

Best practices in R&D: From concept ideation to scaling-up

Product Development Success



July 29-30, 2026

Dairy Products Technology Center, CalPoly San Luis Obispo, CA

TIME	Wednesday, July 29	Program as of June 22, 2026. Subject to change.
8:30 am	Welcome & Introductions	
9:00 am	Where Is the Next \$100M Dairy Product? Ben Yee, Processor Partnerships, California Milk Advisory Board - Market trends shaping the dairy sector - White space opportunities: retail, foodservice, and exports - California production strengths and innovation gaps - Key intelligence sources: Circana, Innova, and Technomic resources	
9:45 am	From Trend to Concept: Building Ideas That Stick Kelli Williamson, California State University, Fresno - Trend mapping and consumer needs identification - Concept screening frameworks - Where to find quality R&D intelligence resources, analyzing data and using AI resources	
10:30 am	Break	
10:45 am	Product Design & Formulation Fundamentals for Dairy Industry Dr. Rohit Kapoor, Dairy Management Inc. - Milk and dairy ingredient composition, unit operations overview - Ingredient functionality and interactions - Formulating to deliver content or nutrition claims	
12:00 pm	Lunch	
1:00 pm	Anticipating and Solving Equipment and Process Constraints Dr. Carmen Licon, California Polytechnic State University, San Luis Obispo - Typical process and equipment for key dairy products - Utilizing fluid and dry ingredients effectively, membrane filtration systems - CIP and upscaling considerations	
1:45 pm	The Sensory Toolkit: Knowing When and How to Test Dr. Carmen Licon, California Polytechnic State University, San Luis Obispo - Types of sensory tests and their appropriate applications - In-house vs. external testing: how to decide - Resources and tools compatible with small and mid-sized operations <i>In-Action Practice: Triangle tests and hedonic evaluation</i>	
2:30 pm	Break In-Action Practice: Sweetness Curves Mardi Fitzgerald, Nutriba	
3:15 pm	Designing Products for Successful Scale-Up. Dr. Hari Meletharayil, Dairy Management Inc. - Ingredient interactions during processing - Process tolerance windows and heat stability - Texture, viscosity, and pumpability targets, Critical formulation limits	
3:45 pm	Smarter Pilots: Prototyping and Designing Trials Dr. Carmen Licon, California Polytechnic State University, San Luis Obispo - Planning effective pilot trials - Experimental design principles and what data to collect - Avoiding common pilot-to-scale pitfalls - Where to run your trials and what to expect	
4:30 pm	Dairy Products Technology Center — Pilot Plant Tour <i>Following the tour, join our speakers for Q&A and a Happy Hour reception (location TBD; 21+ only).</i>	

TIME	Thursday, July 30
8:30 am	Artificial Intelligence for Innovation Dr. Nicole Martin, Cornell Dairy Foods Center, Cornell University - Developing SOPs with AI and innovative tools - Using AI for food safety plans
9:15 am	The Economics of Innovation: Cost Modeling from Ingredient to Shelf (Part I) Sarah Masoni, Oregon State University Food Innovation Center - Ingredient cost modeling - Yield calculations and processing costs - Packaging options and their cost implications - Setting and tracking margin targets
10:00 am	Break
10:15 am	Real Products, Real Decisions: Scale-Up in Practice (Part II) Dr. Bryan Quoc Le, Mendocino Food Consulting - Nutrition and ingredient labeling, food safety and ingredient evaluation - Evaluate the potential commercial landscape for an investment opportunity into a new line or product. - Case Studies
11:00 am	Closing the Gap: From Prototype to Profitable Launch Panel — Chaired by Dairy Management Inc. Panelists: Navi Bola, Albertson's, Ben Yee, CMAB & industry guests - Key decisions ahead of scale-up - Channel considerations: where will you market? - Shelf-life stability and packaging strategy - Constraints unique to dairy plants and food safety considerations
11:45 am	Q&A and Certificate Presentation

Thursday Afternoon: Focused Track *Optional | Limited Enrollment*

Dr. Esther Zeledon, BeAct.Change

Open to founders, student teams, and "entrapreneurs" (R&D, marketing) bringing a concept to market

This focused afternoon track is designed for those at the earliest stages of a dairy venture: R&D and marketing personnel, student teams competing in innovation challenges, founders, or industry professionals exploring a new products line or process. Sessions combine frameworks, live coaching, and peer interaction to sharpen your concept and your ability to communicate it.

1:00 pm	Pitch Perfect: Communicating Your Innovation to Any Room <i>Whether you're presenting to your leadership, a board, a buyer, or a potential investor, the ability to articulate your concept clearly and compellingly is as important as the product itself. This workshop gives you a practical framework for crafting and delivering a pitch that lands — whatever the audience.</i> - Framing your value proposition - Adapting your message for different audiences - Handling questions with confidence
2:00 pm	Building Your Brand Story: Digital Strategy for Dairy Innovators <i>In a crowded market, your brand story can be as powerful a differentiator as your formulation. This session covers how to build an authentic, consistent digital presence that connects with your target customer and drives awareness — without a big agency budget.</i> - Defining your brand identity and voice - Platform strategy for food and dairy products - Content that builds trust and drives trial
3:00 pm	Live Coaching Sessions <i>Put the day's learning to work. Sign up for a free, private one-on-one coaching session with an expert — first come, first served.</i>
~5:00 pm	Adjourn

REGISTRATION: The course is **FREE** for invited guests, California processors, start-ups, suppliers to the industry, students and academic partners. To register for this course email nvanbuskirk@cmab.net with your name, title, affiliation and emails. Other registrations/out of state, please contact Samantha L. Bass slbass@calpoly.edu

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**CALIFORNIA DAIRY
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