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Cover

Conference-at-a-Glance

Event Highlights

Distinguished Speakers

Strategic Resource Management

Joint Keynote Session

Portfolio Management

Project Portfolio Master Class

Interactive Breakout Discussions

Sponsor & Exhibit Opportunities

Hotel & Travel Information

Registration Information

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15th Annual | November 6 - 7, 2017

STRATEGIC RESOURCE MANAGEMENT

Enhanced R&D Productivity, Forecasting and Planning



12th Annual | November 7 - 8, 2017

PORTFOLIO MANAGEMENT

Aligning Portfolio and Productivity with Corporate Strategy to Drive Innovation



November 9 - 10, 2017

PROJECT PORTFOLIO MASTER CLASS

EVENT HIGHLIGHTS

- **Interactive Breakout Discussions** on key topics organized in an informal setting at the end of each conference day
- **50+ Distinguished Faculty** from Top Pharma, Biotech, and Academic Organizations
- This leading industry event brings together **150+ executive participants** from pharma, biotech, CRO, technical/software, government, medical device, academic and hospital organizations
- **Keynote Session** featuring R&D leaders sharing insights on key trends, challenges and opportunities
- **Interactive Exhibit Hall, Networking opportunities, Sponsored talks** by leading technology and service providers showcasing new offerings
- **Special Networking Luncheon** with Lunch-and-Learn Offering

PRESENTING COMPANIES

- AstraZeneca
- Biogen
- Bristol-Myers Squibb
- Eli Lilly and Company
- Gilead
- GlaxoSmithKline
- Harvard University
- Janssen R&D
- Johnson & Johnson
- Merck & Co.
- Merck KGaA, Germany
- Project & Portfolio Value Creation (PPVC)
- Pfizer
- Shire
- Sanofi Genzyme
- Stout Risius Ross (SRR)
- Takeda Pharmaceuticals
- TayganPoint Consulting Group
- The Wharton School



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DAY 1 MONDAY, NOVEMBER 6	DAY 2 TUESDAY, NOVEMBER 7	DAY 3 WEDNESDAY, NOVEMBER 8	MASTER CLASS THURSDAY, NOVEMBER 9	MASTER CLASS FRIDAY, NOVEMBER 10
15 th Annual Strategic Resource Management	15 th Annual Strategic Resource Management	12 th Annual Portfolio Management	Project Portfolio Management Master Class	Project Portfolio Management Master Class
LUNCH	LUNCH	LUNCH	LUNCH	LUNCH
15 th Annual Strategic Resource Management	15 th Annual Strategic Resource Management 12 th Annual Portfolio Management	12 th Annual Portfolio Management	Project Portfolio Management Master Class	Project Portfolio Management Master Class
Interactive Breakouts A	Interactive Breakouts B			
COCKTAIL RECEPTION				

DEAR COLLEAGUE:



Although investment in pharma R&D continues to increase, approval of new drugs remains relatively low. This productivity crisis presents new challenges to biopharma R&D in terms of overall portfolio strategy, therapeutic area strategy, decision making, resource management, forecasting, and R&D operating models. In this environment of declining revenues and uncertain commercial success, biopharma, device and R&D companies need to continuously evaluate their strategy and their portfolios. Manufacturers must make tough decisions about which products and projects to pursue to optimize long-term revenue and reduce overall risk. In addition, to counteract the decline in new therapeutics and high risk of product failure, biopharma must adapt with improved performance planning, R&D analytics, and improved business processes aimed at developing strategic and flexible resource management and PPM systems.

Cambridge Healthtech Institute's and the BioPharma Strategy Series' 15th Annual Strategic Resource Management and 12th Annual Portfolio Management Executive Forum attracts 130+ senior R&D executives from the pharma, biotech, device, IT, public and governmental communities who share best practices in project and portfolio management, R&D innovation, decision analysis, forecasting and the improvement of operational models. Please join us in Philadelphia in November at the top of the Loews Hotel for a unique gathering with fellow executives.

Kind regards,
Micah Lieberman
 Executive Director, Conferences,
 Cambridge Healthtech Institute

EVENT HIGHLIGHTS:

- 2 back-to-back Executive Conferences, plus Annual Updated Project Portfolio Management Master Class
- 15th Annual Strategic Resource & 12th Annual Portfolio Management Executive Forums feature novel case studies, perspectives from thought leaders, industry panels, and the ever-popular interactive breakout discussion groups
- Post-Conference Project Portfolio Management Master Class* led by Dr. Richard Bayney
- Interactive Breakout Discussions on key topics organized in an informal setting at the end of each conference day
- 50+ distinguished faculty from top pharma, biotech, government, academic and private foundations
- Keynote session featuring R&D leaders sharing insights on key trends, challenges and opportunities
- Interactive exhibit hall, networking opportunities, sponsored talks by leading technology and service providers showcasing new offerings
- Special networking luncheon with Lunch-and-Learn offering
- This leading industry event brings together 150+ senior participants from pharma, biotech, CRO, technical/software, government, medical device, academic and hospital organizations

DISTINGUISHED SPEAKERS

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Sultan Aziz, **Senior Director, Product Supply Strategy Deployment, Johnson & Johnson**

Greg Bayer, **Head of Strategy & Operations, R&D Business Insights & Analytics, Bristol-Myers Squibb**

Richard Bayney, Ph.D., **President & Founder, Project & Portfolio Value Creation (PPVC)**

Elizabeth Claire Bearby, **Pharm.D., Senior Director, R&D, Project Management, Eli Lilly and Company**

Robert Boland, **MBA, Associate Director, Emerging Science and Innovation Strategy, Johnson & Johnson**

Erin Brubaker, **Vice President, R&D Strategy Development and Deployment, GlaxoSmithKline**

Amy Davis, **Senior Director, Pharmaceutical Project Management, Medicines Development Unit, Eli Lilly and Company**

Gill Eapen, **Managing Director, Predictive Economics, Stout Risius Ross (SRR)**

Jared Fantasia, **Head, Global NPD Portfolio Operations, Johnson & Johnson**

Sam Gabrielli, **Associate Director, Portfolio & Project Management, Gilead Sciences**

Steve Galatis, **Director, Strategic Options and Assessment, Specialty, Bristol-Myers Squibb**

Keith Gardner, **Senior Director, Decision Science, AstraZeneca**

Heather Gaylord, **Associate Director & Lead, Program and Change Management, Shire**

Lauren Hirshon, **Affiliated Faculty, Organizational Dynamics, University of Pennsylvania; Director of Operations and Development, Leadership for a Networked World, Harvard University**

Jo James, **Associate Director, Resource & Performance Management, R&D Business Operations, Biogen**

Josh Kaminetz, **Director, Resource Management, Global Regulatory Affairs and Clinical Safety, Merck & Co.**

Elayne Ko, **Director, Portfolio & Decision Analysis, Pfizer**

Delfi Krishna, Ph.D., **Director of Operations, Planning and Strategy, Cell and Gene Therapy Platform, GlaxoSmithKline**

Nathan Lewis, **Senior Advisor, LRL Project Management, Eli Lilly and Company**

Sam Mathew, **MBA, R&D Analytics Leader, Project Portfolio Management, Janssen, Pharmaceutical Companies of Johnson & Johnson**

Derek Newberry, Ph.D., **Business Anthropologist; Affiliated Faculty, Organizational Dynamics, University of Pennsylvania; Author, "Committed Teams"**

Daniel Patrick, **Senior Consultant, TayganPoint Consulting Group**

Matthew Pazdernik, **Director, Submission Planning and Portfolio Management Lead, Regulatory Affairs, Merck & Co.**

Amy Hargis Peltz, **Senior Director, Pharmaceutical Project Management, Medicines Development Unit, Eli Lilly and Company**

Ian Popoff, **Senior Director, Strategic Portfolio Management, Pfizer**

Aaron Salancy, **MBA, Director, Strategic Options & Assessment, Bristol-Myers Squibb**

Kelly Schmidt, **Senior Director and Head, R&D Analytics, Project Management Organization, Janssen Research & Development**

Kathrin Schoenborn-Sobolewski, Ph.D., **Vice President, Integrated Planning, Analytics & Partnering, Merck KGaA, Darmstadt, Germany**

Dan Smith, **Vice President, Enrich**

Richard Sonnenblick, Ph.D., **CEO, Enrich**

Pik Leng Wong, **Director, Biologics Project Management Office (PMO), Sanofi Genzyme**

Yong (Sean) Xue, Ph.D., **CFA, Director, Global Portfolio Management, Takeda Pharmaceuticals**

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Although investment in pharma R&D continues to increase, approval of new drugs remains relatively low. This productivity crisis presents new challenges to biopharma R&D in terms of resource management, forecasting, and capacity planning. To counteract the decline in new therapeutics and high risk of product failure, biopharma must adapt with improved performance planning, intelligent outsourcing, and new big data analytics aimed at developing strategic and flexible resource management systems. Cambridge Healthtech Institute's and the BioPharma Strategy Series' 15th Annual "Strategic Resource Management: Enhanced R&D Productivity, Forecasting and Planning" attracts over 100 senior R&D executives sharing best practices and new ideas on how to enhance R&D productivity, forecasting and planning with important discussions on optimizing resource management, outsourcing, innovation, R&D, clinical capacity planning, forecasting and business intelligence strategies.

MONDAY, NOVEMBER 6

7:45 am Registration and Morning Coffee

OPENING SESSION:

INTEGRATING PPM, RESOURCE MANAGEMENT AND TECH TO SUPPORT DECISION MAKING AND PROGRAM EXECUTION

8:45 Organizer's Welcome

Micah Lieberman, Executive Director, Conferences, BioPharmaceutical Strategy Series, Cambridge Healthtech Institute (CHI)

8:55 Chairperson's Opening Remarks: Another Year in Industry...Where Are We Now and Where Are We Going?

Steve Galatis, Director, Strategic Options and Assessment, Specialty, Bristol-Myers Squibb

9:00 **CASE STUDY: A Year of Development and a Year of Use of Integrated PPM Strategic Project Resource & Portfolio Management System, Processes & Tools**

Sam Gabrielli, Associate Director, Portfolio & Project Management, Gilead Sciences

Integrating PPM at Gilead, where breakneck speed, decision agility and low overhead are prized over precise project cost accounting, required a thorough PPM maturity assessment, rigorous requirements development and thoughtful partner selection. In a year-long journey, Gilead PPM went from a winning rugby team to an even more highly effective team with an aligned and integrated project, portfolio and resource management system managed by 30 people.

9:30 **CASE STUDY: An Analytical Approach to Resource Management**

Kathrin Schoenborn-Sobolewski, Ph.D., Vice President, Integrated Planning, Analytics & Partnering, Merck KGaA, Darmstadt, Germany

At Merck Biopharma R&D (EMD Serono in the US), we have developed our capabilities to forecast resource demand via algorithms and attrition models for our R&D portfolio. As the next step in our journey, we are focusing on developing analytical dashboards to allow our stakeholders in the functions to better utilize the data to run their business and make informed decisions. We would like to share our approach and deliverables that have been developed and the challenges and lessons that were learned to allow for a successful adoption in the organization.

10:00 **Times They Are a-Changin'... Implementation of Business Process and Technology Changes to Support a New R&D Operating Model**

Jo James, Associate Director, Resource & Performance Management, R&D Business Operations, Biogen

The presentation will demonstrate how Biogen has combined its need to update technology and business process to enable more effective portfolio management and resource management and align with new prioritization and governance structures within a new R&D operating model.

10:30 **Networking Coffee Break**

SHORT- & LONG-TERM FUNCTIONAL RESOURCE PLANNING AND FORECASTING IN DYNAMIC ENVIRONMENTS: WORKFORCE AGILITY, IMPACT OF PARTNERSHIPS

11:15 **CASE STUDY: Increasing Forward Planning and Workforce Agility ... A New Culture in R&D Organizations?**

Delfi Krishna, Ph.D., Director of Operations, Planning and Strategy, Cell and Gene Therapy Platform, GlaxoSmithKline

Strategic resource management is critical in meeting business objectives, selecting and retaining the best talent and achieving financial effectiveness of an organization. With ambitious R&D agendas to be delivered under flat budgets, maintaining competitive edge in a resource constraint environment can be very challenging. We will share some approaches of resource modeling and forecasting, capacity planning, and methods to align productivity to short-term and long-term organizational strategy. We will also share some approaches to attract, develop, engage, retain and motivate scarce and highly specialized resource capabilities.

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11:45 Understanding and Addressing the Short- and Long-Term Impact of Business Development (Partnerships, Licensing, Co-Development, etc.) Agreements on Functional Resources

Josh Kaminetz, Director, Resource Management, Global Regulatory Affairs and Clinical Safety, Merck

Business development opportunities often come with a business case that is presented as overwhelmingly positive for the company. Once the deal is signed, the celebrations and congratulations occur, then BD is off to the next deal. What remains is an obligation to use functional area resources in support of work that was neither forecasted by the area, nor properly reflected in the business case. A case study in how this issue was addressed by our functional sub-division will be presented.

12:15 pm Luncheon Presentation (Sponsorship Opportunity Available) or Enjoy Lunch on Your Own

HOW TO LEVERAGE THE PROJECT MANAGEMENT OFFICE (PMO) TO BEST ENABLE PROJECT/PORTFOLIO DELIVERY

1:55 Chairperson's Remarks

Sam Gabrielli, Associate Director, Portfolio & Project Management, Gilead Sciences

2:00 Simple Tips for a 180° Transformation of a PMO

Pik Leng Wong, Director, Biologics Project Management Office (PMO), Sanofi

Is your PMO a trusted value-added partner of your organization? Is there a need to increase the effectiveness of your PMO? This talk showcases the transformation of a PMO for a commercial operation site from a non-value added organization to one recognized as best-in-class within the whole of Sanofi Genzyme.

2:30 How to Leverage the PMO to Best Enable Project/Portfolio Delivery

Amy Hargis Peltz, Senior Director, Pharmaceutical Project Management, Medicines Development Unit, Eli Lilly and Company

Most pharmaceutical companies leverage Project Management Offices (PMOs) yet there is high variability in how they are utilized. The purpose of this session is to share how we leverage our PMO and facilitate discussion on how others leverage as well. There is a need in industry to have a facilitated discussion on this topic in order to improve the overall productivity of our industry.

3:00 CASE STUDY: Development of Shire's Prioritization Methodology – An Exercise in Change Management

Heather Gaylord, Associate Director & Lead, Program and Change Management, Shire

Are we doing the most valuable combination of projects? Shire has been developing a method to answer this question consistently across a 15,000 person Technical Operations organization. This talk shares the change management approach we took to develop and roll out a new way of working.

3:30 Breakout Discussion Groups Remarks & Introduction to Tables and Moderators

Daniel Patrick, Senior Consultant, TayganPoint Consulting Group

3:35 Refreshment Break with Exhibit Viewing

INTERACTIVE BREAKOUT DISCUSSIONS

4:15 Interactive Breakout Discussions

Concurrent breakout discussion groups are interactive, guided discussions hosted by a facilitator or set of co-facilitators to discuss some of the key issues presented earlier in the day's sessions. Delegates will join a table of interest and become an active part of the discussion at hand. To get the most out of this interactive session and format, please come prepared to share examples from your work, vet some ideas with your peers, be a part of group interrogation and problem solving, and, most importantly, participate in active idea sharing.

The Breakout Discussion session will run two times - on Monday afternoon just before the reception and Tuesday afternoon at end of day. See page 10.

5:00 Welcome Reception with Exhibit Viewing

6:00 Close of Day

TUESDAY, NOVEMBER 7

DEVELOPING AND LEVERAGING INTEGRATED ANALYTICS FOR R&D

8:00 am Breakfast Presentation (Sponsorship Opportunity Available) or Morning Coffee

8:40 Chairperson's Remarks

Nathan Lewis, Senior Advisor, LRL Project Management, Eli Lilly and Company

8:45 CASE STUDY: Developing and Leveraging Integrated Analytics for R&D

Steve Galatis, Director, Strategic Options and Assessment, Specialty, Bristol-Myers Squibb

In 2017, BMS launched an effort to integrate analytics support for its R&D organization to systematically capture the full potential of BMS's analytical capabilities. Key elements of this effort included strengthening existing analytical capabilities, breaking down walls between analytical groups, quickly and efficiently sharing development team issues with appropriate members of the analytics community, and simplifying interactions between development teams and the analysts supporting them. Examples of capabilities included in the case study will be analytical support for clinical trial design, including trial risk, timing, and overall strategy.

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Making Strategy Happen

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9:15 CASE STUDY: Advancing Analytics to Boost R&D Productivity

Sam Mathew, MBA, R&D Analytics Leader, Project Portfolio Management, Janssen, Pharmaceutical Companies of Johnson & Johnson

This case study will share our efforts at advancing analytics to boost R&D productivity. The presentation of use cases covers strategies and actions that enable: Let's Predict, Let's Succeed, Let's Prescribe, Let's Model. The presentation will share examples from our pragmatic implementation of predictive and prescriptive modeling analytics at Janssen, and will share how we used a Design Thinking approach for risk management, forecast error, portfolio simulation and modeling.

9:45 Sponsored Presentation (Opportunity Available)

10:15 Coffee Break with Exhibit Viewing

PREDICTIVE ANALYTICS, ECONOMIC VALUATION AND CROWDSOURCING TO OPTIMIZE PORTFOLIOS

11:00 Predictive Analytics, Economic Valuation and Decision Options in Pharmaceutical Portfolio Management

Gill Eapen, Managing Director, Predictive Economics, Stout Risius Ross (SRR)

Decision Options combines machine learning and economic analysis to help select and design projects and to maximize the value of a portfolio of diverse projects. By combining predictive analytics and economic valuation techniques, it provides a practical way to portfolio management supported by theory. Attendees will learn how to connect project level thinking - section and design of projects with portfolio level decisions, based on economic value.

“ Each year, CHI's Strategic Resource and Portfolio Management event is our most important venue for reconnecting with key decision makers and thought leaders in Portfolio Management and Resource Planning. ”

President and CEO, Enrich

11:30 Leveraging the Wisdom of the Crowd to Optimize Your Portfolio

Robert Boland, Associate Director, Emerging Science and Innovation Strategy, Johnson & Johnson

Prediction markets and crowdsourcing have been leveraged for some time by some of the biggest companies in the world. Discover how companies such as Johnson & Johnson are leveraging these innovative approaches in unique ways to capitalize on the knowledge of their employees, while driving strategic insights and key decision making on some of their most important portfolios.

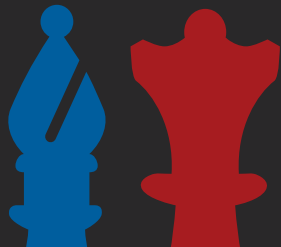
12:00 pm Session Break, Transition to Luncheon

12:10 Joint Keynote Session and Welcome Luncheon

STRATEGIC RESOURCE MANAGEMENT & PORTFOLIO MANAGEMENT FORUMS

See Page 6 for details

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November 7, 2017

JOINT KEYNOTE SESSION

Strategic Resource Management & Portfolio Management Forums

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TUESDAY, NOVEMBER 7

12:10 Welcome Portfolio Management Conference Registrants & Joint Session Luncheon Announcements

Micah Lieberman, Executive Director, Conferences, BioPharmaceutical Strategy Series, Cambridge Healthtech Institute (CHI)

This year, the joint keynote session will begin with a networking Welcome Luncheon and Presentation. Attendees from Strategic Resource Management and Portfolio Management are invited to enjoy a delicious plated luncheon while networking and collaborating with fellow attendees during an informative "Lunch-and-Learn" presentation.

12:15 LUNCHEON-AND-LEARN: Lessons from the Field: Presenting Your Assets for Effective Decision Making

Richard Sonnenblick, Ph.D., CEO, Enrich

This lunch and learn presentation will focus on three key lessons: 1) Identifying the portfolio strategy when your executives haven't, 2) Preparing an effective portfolio dossier: critical processes and methods; and 3) Ensuring executives get what they need before, during, and after the portfolio review meeting.

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INTEGRATING STRATEGY DEVELOPMENT AND DEPLOYMENT TO IMPROVE CULTURE AND ENHANCE PRODUCTIVITY

1:25 Chairperson's Opening Remarks for Shared Keynote Session

Robert Boland, Associate Director, Emerging Science and Innovation Strategy, Johnson & Johnson

1:30 SPECIAL CO-PRESENTATION: Managing the Human Side of Strategy Implementation

Part I: Creating a Culture of Effective Strategy Execution: Why Organizations Resist Change and How to Bring Them Along

Derek Newberry, Business Anthropologist; Affiliated Faculty, Organizational Dynamics, University of Pennsylvania; Author, "Committed Teams"

"Culture eats strategy for breakfast," as management guru Peter Drucker famously said. We know that for strategy to succeed, it must be supported by an organization's culture, but creating this alignment can be especially difficult in the context of a rapidly changing pharmaceutical industry. In this session, we will apply time-tested principles of cultural change to understand how to identify and overcome the invisible forms of resistance in organizations that cause strategies to fail.

Part II: Getting Teams Aligned on Strategy: Why Groups Fail to Execute on Goals and What to Do About It

Lauren Hirshon, Affiliated Faculty, Organizational Dynamics, University of Pennsylvania; Director of Operations and Development, Leadership for a Networked World, Harvard University

In an uncertain healthcare environment, effective collaboration will be more crucial than ever. Most strategic initiatives fall short of their goals, and one of the biggest

reasons is that the teams charged with developing and implementing strategy become misaligned or underperform. In this session, we step through a simple framework for creating high-performing teams that make better strategic decisions and can execute effectively.

2:30 Integrating Strategy Development, Innovation, Change Management and Program Execution

Erin Brubaker, Vice President, R&D Strategy Development and Deployment, GlaxoSmithKline

As pharmaceutical, biotech and device companies continue to search for new cures, develop new technologies and pursue innovation both inside and outside of their own walls with creative partnerships, some of the biggest challenges are not always related to the molecule or the technology. To effectively deploy a highly-skilled R&D workforce in pursuit of the optimal portfolio, a well-defined strategy must be in place first. Then, in tandem and with equal importance, the organization must manage change and execute on the strategy. Too often these are all disparate activities. This presentation will share a story on how we are trying to tie it all together.

3:10 Take Your Data to the Disco: Transforming Your Culture to Generate Insights for Action

Kelly Schmidt, Senior Director and Head, R&D Analytics, Project Management Organization, Janssen Research & Development

Our team has championed self-service analytics to support all facets of project planning, forecasting, and portfolio for more than five years. We've focused on tools, data and process, but the key is really about culture shift. We'll share how our change journey in the last year has focused on embedding new analytics and insights into the culture by focusing more on the "blue disco ball" concept and design thinking.

3:50 Breakout Discussion Groups Remarks & Introduction to Tables and Moderators

Daniel Patrick, Senior Consultant, TayganPoint Consulting Group

3:55 Refreshment Break with Exhibit Viewing

4:40 Interactive Breakout Discussions

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5:30 Close of STRATEGIC RESOURCE MANAGEMENT Executive Forum (PORTFOLIO MANAGEMENT continues on through Wednesday, November 8)

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PORTFOLIO MANAGEMENT

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TUESDAY, NOVEMBER 7, 2017

11:00 am Registration

12:10 pm Joint Keynote Session and Welcome Luncheon

STRATEGIC RESOURCE MANAGEMENT & PORTFOLIO MANAGEMENT FORUMS

See Page 6 for details

WEDNESDAY, NOVEMBER 8

7:45 am Breakfast Presentation (*Sponsorship Opportunity Available*) or Morning Coffee

UTILIZING DATA VIZ & STRUCTURED DECISION MAKING TO IMPROVE PORTFOLIO VALUE

8:25 Chairperson's Remarks

Greg Bayer, Head of Strategy & Operations, R&D Business Insights & Analytics, Bristol-Myers Squibb

8:30 **CASE STUDY: Data Insight Visualization and Structured Decision Making to Support an Agile Operating Plan**

Jared Fantasia, Head, Global NPD Portfolio Operations, Johnson & Johnson

This talk will share experience in managing a global governance model and lessons learned from implementing these best practices in a global/cross-functional organization. 1) Optimizing R&D pipeline decision making by identifying areas of constraints and challenges, 2) Making strategic trade-off decisions and determining the impact of your project portfolio on your future pipeline sufficiency, 3) Ensuring alignment of every project in your portfolio to your corporate strategy and growth ambitions.

9:00 **CASE STUDY: What Do Experts Know? Combining Data and Opinion for Portfolio Evaluation in Pharma**

Keith Gardner, Senior Director, Decision Science, AstraZeneca

AstraZeneca has more than 20 individual compounds that are suitable for combination with each other and development for the mitigation of cancer. The number of possible alternatives precludes us from trying each one, for financial and other resourcing reasons. The Decision Science team has offered a solution by way of MCDA (multi-criteria decision analysis). We combine expert opinion with some available data and generate a measure of uncertainty alongside a rank ordering.

9:30 **Measuring Quality in the Portfolio**

Ian Popoff, Senior Director, Strategic Portfolio Management, Pfizer

This presentation will focus on identifying and converging on objective measures of non-quantitative attributes of projects in the early clinical portfolio to enable decision making, and include a brief overview of a 'Portfolio Health' exercise that ran at Pfizer in the recent past.

10:00 **Coffee Break with Exhibit Viewing**

EVALUATING OPPORTUNITIES ACROSS THERAPEUTIC AREAS & LIFECYCLES

10:45 **Evaluating Pharma R&D Lifecycle Opportunities: Process and Methodology**

Elayne Ko, Director, Portfolio & Decision Analysis, Pfizer

Pharmaceutical companies pursue lifecycle (product enhancement) opportunities to maximize the value of the asset and, subsequently, the R&D portfolio. There are different options to pursue lifecycle studies which impact the timing, risks and return tradeoff. This case study illustrates the process to facilitate investment decision-making and the methodology to analyze lifecycle programs. The presentation highlights the decision analysis process, the focus of the dialogue during facilitated meetings, and the appropriate evaluation structure based on identified the upside potential, downside risks and technical risk dependencies.

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PORTFOLIO MANAGEMENT

Aligning Portfolio and Productivity with Corporate Strategy to Drive Innovation

11:15 INTERACTIVE PANEL DISCUSSION: Portfolio Management within TAs and across the Pan-Company Portfolio

Panelists:

Nathan Lewis, Senior Advisor, LRL Project Management, Eli Lilly and Company
Elizabeth Claire Bearby, Pharm.D., Senior Director, R&D, Project Management, Eli Lilly and Company
Ian Popoff, Senior Director, Strategic Portfolio Management, Pfizer
Yong (Sean) Xue, Ph.D., CFA, Director, Global Portfolio Management, Takeda Pharmaceuticals

Managing a corporate portfolio requires trade-offs, strategic investments, and prioritization. There is no “one way” to effectively manage the budget, maintain focus, or implement a methodology for decision making. The objective of this presentation and discussion of panelists is to highlight different best practices and to address the following questions:

- How do companies do portfolio management within TAs and across the pan-company portfolio?
- What systems and metrics are being used to enable portfolio management?
- Do companies limit focus to core therapeutic areas, allow for opportunistic clinical investigation or a mix? How do companies remain opportunistic?

12:00 pm Luncheon Presentation (Sponsorship Opportunity Available) or Enjoy Lunch on Your Own

INTEGRATING PIPELINE/PORTFOLIO INFORMATION TO OPTIMIZE CROSS-DIVISIONAL ALIGNMENT, SUBMISSIONS AND OVERALL PORTFOLIO HEALTH

1:25 Chairperson's Remarks

Keith Gardner, Senior Director, Decision Science, AstraZeneca

1:30 Building and Optimizing Global Regulatory Submission Project and Portfolio Management

Matthew Pazdernik, Director, Submission Planning and Portfolio Management Lead, Regulatory Affairs, Merck & Co.

Our Portfolio and Submission Project Management (PSPM) tool and supporting processes deliver the planning capability to support global regulatory submissions. Because of implementing PSPM, we have the ability to view the entire portfolio of regulatory submission work, including the lifecycle status of each submission. The business impact is transparency and visibility of each regulatory filing status across the portfolio, enabling robust portfolio management and ultimately prioritization and resource management decisions. In addition, the tool and process drive significant impact in increasing 'right-first-time' quality and reducing cycle time and rework for filings around the world.

2:00 Connecting Portfolio Management to Portfolio Strategy to Ensure Data Reporting/Analytic Can Really Address Business Needs

Yong (Sean) Xue, Ph.D., CFA, Director, Global Portfolio Management, Takeda Pharmaceuticals

This talk will discuss how we started with portfolio strategic questions and overall business goals, then connected to TA and individual asset strategies. We defined critical data needs for reporting/visualization, tracking and analytics and avoided data analysis for the sake of analysis. Instead, we focused on the key portfolio data requirements. With the insights gained from data and leveraging industry benchmarks we then set organization goals (KPIs) to incentivize the right behaviors to fulfill our portfolio goals.

CO-PRESENTATIONS AND INTERACTIVE DISCUSSION: DECISION MAKING UNDER CONDITIONS OF UNCERTAINTY

2:30 INTERACTIVE PANEL: Decision-Making Under Conditions of Uncertainty: Implications for Optimal Portfolio Management

Panelists:

Sultan Aziz, Senior Director, Product Supply Strategy Deployment, Johnson & Johnson
Greg Bayer, Head of Strategy & Operations, R&D Business Insights & Analytics, Bristol-Myers Squibb
Daniel Patrick, Senior Consultant, TayganPoint Consulting Group

Given the inherent volatility and uncertainty in the drug development process, the panelists will discuss topics such as the following:

- Frameworks for addressing the uncertainties in the drug development process
- Perspectives relative to the differences in the decision-making process between early-stage and late-stage R&D assets, including differences in inputs to the analysis for early vs. late stage programs
- How to factor in the “risk tolerance” of the organization
- How to maintain objectivity in the decision-making process when evaluating R&D programs
- Performing “post-mortem reviews” of R&D programs and lessons learned

3:15 Chairperson's Closing Remarks

3:20 Close of PORTFOLIO MANAGEMENT Executive Forum

Register by August 18
SAVE up to \$400



November 9 - 10, 2017

PROJECT PORTFOLIO MASTER CLASS

The Project Portfolio Management Master Class will be held November 9-10, 2017 at the Loews Philadelphia Hotel in Philadelphia, PA. The course is being led by Dr. Richard Bayney, President & Founder of Project & Portfolio Value Creation.

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Portfolio Management

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Cambridge Healthtech Institute



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HOW THIS MASTER CLASS IS DIFFERENT:

This class begins with well-founded economic and portfolio theory, and quickly moves to practical training in portfolio value maximization using Excel add-in optimization software.

Economic principles learned in the master class can be used during preparations and analysis for portfolio reviews and executive decision-making right away.

Unlike other courses that focus on value creation and project prioritization, this master class utilizes a comprehensive approach to value maximization using cutting edge portfolio methodologies within a holistic portfolio management framework – CREOPM™.

Learn how to shape the strategic and financial goals of your company by using compelling and actionable portfolio analysis to influence corporate decision-makers.

WHO SHOULD ATTEND:

Pharmaceutical and biotech industry professionals involved in:

- Research
- Clinical Development
- Project, Program, & Portfolio Management
- Resource Management
- Marketing
- Licensing & Business Development
- Finance

THURSDAY, NOVEMBER 9

- 8:00 am Registration
- 8:30 Session 1: Overview, Goals, Survey Results
- 9:30 Session 2: Decision-Making under Risk and Uncertainty
- 10:30 Coffee Break
- 10:45 Session 3: CREOPM
- 12:00 pm Lunch
- 1:00 Session 4: Financial Valuation
- 2:30: Refreshment Break
- 2:45 Session 5: Project Prioritization
- 4:00 Session 6: Portfolio Optimization (I)
- 5:30 End of Day One

WHAT YOU WILL LEARN:

- The CREOPM™ framework, a proven, step-by-step approach to positioning R&D portfolios for short-, medium-, and long-term success.
- Categorize project and program investments into non-discretionary and discretionary buckets.
- Analyze risk and assess overall probability of success.
- Evaluate assets using four critical drivers – benefit, risk, cost, time.
- Optimize portfolios to make the best use of constrained budgetary and human resources.
- Prioritize projects using quantitative and qualitative decision criteria.
- Manage risk, resources and stakeholders and improve decision-making under conditions of risk and uncertainty.

ABOUT YOUR MASTER CLASS LEADER:



Dr. Richard Bayney is President & Founder of Project & Portfolio Value Creation, a consulting boutique providing training and education in project, program, portfolio, resource, and risk management as well as client services in strategic, business, and portfolio planning. He is an adjunct faculty member at the University of Pennsylvania. Dr. Bayney is a 23-year veteran of the Pharmaceutical & Biotechnology industry at Merck & Co., Bayer Corp. and AG, Bristol-Myers Squibb, and Johnson & Johnson Pharmaceutical Research & Development. He obtained his MSc and Ph.D. from University of London, MBA from Columbia University, and PMP from the Project Management Institute. In his last corporate position, Dr. Bayney was Head of Decision Analysis & Portfolio Management at Johnson & Johnson Pharmaceutical Research & Development.

FRIDAY, NOVEMBER 10

- 8:00 am Morning Coffee
- 8:30 Session 7: Portfolio Optimization (II)
- 10:00 Coffee Break
- 10:15 Session 8: Portfolio Management Capability Maturity Models
- 11:00 Session 9: Strategic, Portfolio, & Business Plans
- 11:30: Q&A
- 12:00 pm End of Master Class

Register by August 18
SAVE up to \$400

INTERACTIVE BREAKOUT DISCUSSIONS

Concurrent breakout discussion groups are interactive, guided discussions hosted by a facilitator or set of co-facilitators to discuss some of the key issues presented earlier in the day's sessions. Delegates will join a table of interest and become an active part of the discussion at hand. To get the most out of this interactive session and format please come prepared to share examples from your work, vet some ideas with your peers, be a part of group interrogation and problem solving, and, most importantly, participate in active idea sharing.

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The Breakout Discussion session will run two times - on Monday afternoon just before the reception, and Tuesday afternoon at end of day.

TABLE 1: Making Decisions in the Presence of Growing Information and Complexity

Moderators:

Gill Eapen, Managing Director, Predictive Economics, Stout Risius Ross (SRR)

Elayne Ko, Director, Portfolio & Decision Analysis, Pfizer
Charles Dormer, Principal, APEX STP

- How do "gut feel" decisions fare in the modern world, dominated by exponentially growing information?
- How could information technology and analytics help make better and faster decisions?
- How does one measure decision quality? How do decisions relate to Value and Risk?

TABLE 2: What Are Some Best Practices around Using (Imperfect) Planning Assumptions and Presenting the Assumptions Used in Our Analyses?

Moderators:

Josh Kaminetz, Director, Resource Management, Global Regulatory Affairs and Clinical Safety, Merck & Co.

Keith Gardner, Senior Director, Decision Science, AstraZeneca

Sultan Aziz, Senior Director, Product Supply Strategy Deployment, Johnson & Johnson

- What happens when we don't have all the inputs required to conduct a thorough analysis?
- How do we use assumptions cascaded to us that we believe to be inaccurate? How many scenarios should be conducted/presented to bracket the uncertainty of the inputs?
- How do we fairly present the (in)accuracies of our analyses while maintaining confidence that the analysis itself is valuable? How do we keep the caveats (footnotes, assumptions, etc.) from clouding the key messages?

TABLE 3: How to Leverage the PMO to Best Enable Project/Portfolio Delivery

Moderators:

Amy Hargis Peltz, Senior Director, Pharmaceutical Project Management, Medicines Development Unit, Eli Lilly and Company

Jared Fantasia, Head, Global NPD Portfolio Operations, Johnson & Johnson

Pik Leng Wong, Director, Biologics Project Management

Office (PMO), Sanofi Genzyme

- Why is there such variability in how pharma companies leverage Project Management Offices (PMOs)?
- What are some ways we, in various organization, leverage our PMO? Where do we fail and where do we succeed?
- What are some key insights we can consider for our own PMO?

TABLE 4: Portfolio Management Process Implementation: Success Factors

Moderators:

Richard Bayney, Ph.D., President & Founder, Project & Portfolio Value Creation (PPVC)

Matthew Pazdernik, Director, Submission Planning and Portfolio Management Lead, Regulatory Affairs, Merck & Co.

Greg Bayer, Head of Strategy & Operations, R&D Business Insights & Analytics, Bristol-Myers Squibb
Heather Gaylord, Associate Director & Lead, Program and Change Management, Shire

- What are the key success factors in implementing Portfolio Management Processes and ensuring sustainability?
- Who are the key personnel that contribute to the success in implementing Portfolio Management Processes and ensuring sustainability?
- How do you identify and engage stakeholders?

TABLE 5: Portfolio Management within TAs and across the Pan-Company Portfolio

Moderators:

Nathan Lewis, Senior Advisor, LRL Project Management, Eli Lilly and Company

Ian Popoff, Senior Director, Strategic Portfolio Management, Pfizer

Yong (Sean) Xue, Ph.D., CFA, Director, Portfolio Management, Takeda Pharmaceuticals

- How do companies do portfolio management within TAs and across the pan-company portfolio?
- What systems and metrics are they using to enable the portfolio management?
- Do other companies define core TA areas and manage to this or do they remain opportunistic?
- Concentration of TA?

TABLE 6: How Do You Achieve Workforce Agility in a Large R&D Organization?

Moderators:

Delfi Krishna, Ph.D., Director of Operations, Planning and Strategy, Cell and Gene Therapy Platform, GlaxoSmithKline

Jo James, Associate Director, Resource & Performance Management, R&D Business Operations, Biogen

- What is workforce agility?
- Why is it important and how do you drive it?
- What are some concrete actions that can be taken to achieve workforce agility?

TABLE 7: Developing and Leveraging Integrated Analytics for R&D

Moderators:

Steve Galatis, Director, Strategic Options and Assessment, Specialty, Bristol-Myers Squibb

Sam Mathew, MBA, R&D Analytics Leader, Project Portfolio Management, Janssen, Pharmaceutical Companies of Johnson & Johnson

Kathrin Schoenborn-Sobolewski, Ph.D., Vice President, Integrated Planning, Analytics & Partnering, Merck KGaA, Darmstadt, Germany

Richard Sonnenblick, Ph.D., CEO, Enrich

Dan Smith, Vice President, Enrich

- How are companies advancing analytics to boost R&D productivity?
- Where are the greatest opportunities inside of biopharmaceutical organizations for business operations optimization and improved decision making?
- What are pragmatic examples of implementation of predictive and prescriptive modeling analytics for risk management, forecast error, portfolio simulation & modeling?
- What are challenges and lessons learned for a successful adoption in an organization?

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Sponsorship, Exhibit, and Lead Generation Opportunities

CHI offers comprehensive sponsorship packages which include presentation opportunities, exhibit space, branding and networking with specific prospects. Sponsorship allows you to achieve your objectives before, during, and long after the event. Any sponsorship can be customized to meet your company's needs and budget. Signing on early will allow you to maximize exposure to qualified decision-makers.

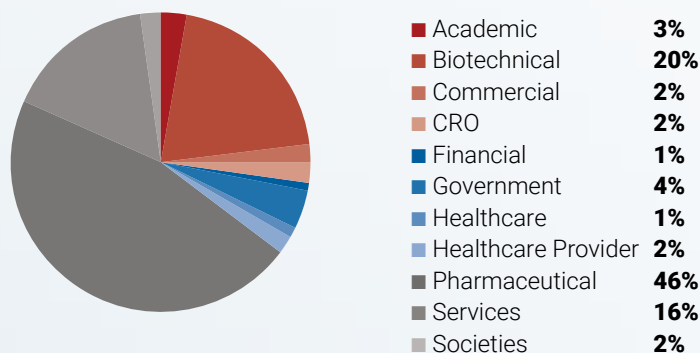
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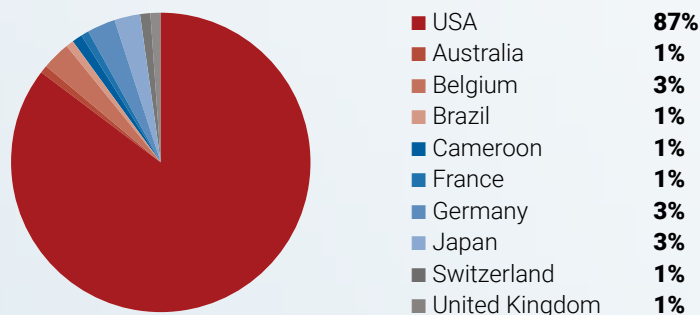
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- Webinars
- Custom Market Research Surveys
- Podcasts

For sponsorship and exhibit information, please contact:

Uma Patel
 Business Development Manager
 781-972-1349 | upatel@healthtech.com

Hotel & Travel

Conference Venue and Hotel:

Loews Philadelphia Hotel
 1200 Market Street
 Philadelphia, PA 19107
 Tel: 215-627-1200

Discounted Room Rate: \$219 s/d

Discounted Room Rate Cutoff Date: October 6, 2017

For reservations and additional information, please visit the travel page of ExecutiveDecisionMaking.com.

