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BPSS BioPharma Strategy Series

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Twelfth Annual

STRATEGIC RESOURCE MANAGEMENT

November 3 - 4, 2014

Enhanced R&D Productivity, Forecasting & Planning

Ninth Annual

PORTFOLIO MANAGEMENT

November 4 - 5, 2014

Aligning Portfolio & Productivity with Corporate Strategy to Drive Innovation

Speaking Organizations

Pfizer
Novartis Institutes for BioMedical Research, Inc.
Merck
Johnson & Johnson
Eli Lilly & Co.
Bristol-Myers Squibb
Daiichi Sankyo Pharma Development
Baxter Healthcare
Merck KGaA
Merck Research Laboratories
Merck Serono
Janssen Pharmaceuticals
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NIH
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The Wharton School, UPenn
TranScrip Partners
Celerion, Inc.
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NOVEMBER 6 - 7, 2014

Project Portfolio Management Certification Master Class

Instructor *Richard Bayney, Ph.D., President & Founder, Project & Portfolio Value Creation; former Vice President, Portfolio Management & Decision Analysis, Johnson & Johnson*

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CONFERENCE-AT-A-GLANCE

Day 1 Monday, November 3	Day 2 Tuesday, November 4	Day 3 Wednesday, November 5	Master Class *Separate Registration Required Thursday, November 6	Master Class *Separate Registration Required Friday, November 7
12th Annual Strategic Resource Management	Breakfast Presentation	Breakfast Presentation	Project Portfolio Management Certification Master Class	Project Portfolio Management Certification Master Class
	12th Annual Strategic Resource Management	9th Annual Portfolio Management		
Lunch	Lunch	Lunch	Lunch	
12th Annual Strategic Resource Management	12th Annual Strategic Resource Management	9th Annual Portfolio Management	Project Portfolio Management Certification Master Class	
	& 9th Annual Portfolio Management			
Interactive Breakouts: A	Interactive Breakouts: B			
Cocktail Reception				

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John Ansell,
Senior Partner, TranScrip Partners

Charles Alsdorf,
Director, Capital Efficiency Services, Deloitte

Sultan Aziz,
Senior Director, Capacity Management, Janssen Pharmaceuticals

Greg Bayer,
Group Director, R&D Scheduling & Resource Management, Bristol-Myers Squibb

Richard Bayney, Ph.D.,
President, Project & Portfolio Value Creation; former Vice President, Portfolio Management & Decision Analysis, Johnson & Johnson

Joseph Billitti, Ph.D.,
MBA, Executive Director, Strategy and Operations, Global Research & Development, Pfizer

Pasquale Cetera,
Consultant, MKTG Pharmaceuticals; former Vice President, Portfolio Management and Strategy, Merck

Jennifer Daubenspeck, Ph.D.,
Manager, Reporting and Capabilities, Bristol-Myers Squibb

Jeffrey Davis, M.D.,
Director, Human Health and Performance (HH&P), CMO, NASA Johnson Space Center

Sydney Edwards, Ph.D.,
Head, Portfolio Management, Allergan, Inc.

Carmel Egan, Ph.D.,
Vice President, Project Management, Eli Lilly & Co.

Philip Fahringer,
Analyst, Center for Innovation, Lockheed Martin

Jonathan Freeman, Ph.D.,
Senior Vice President, Head of Portfolio Management, Merck Serono

Keith Friend, Ph.D.,
Senior Director, Medical Affairs, Otsuka (OAPI)

Krish Ghosh, Ph.D.,
Vice President, Informatics, Covance

Arkady Gusev, Ph.D.,
US Operations Head, Biomarker Development (BMD), Translational Medicine, Novartis Institutes for BioMedical Research, Inc.

Ling He,
Director, Clinical Bioanalysis, Daiichi Sankyo Pharma Development

Hartmut Hein, Ph.D.,
Director, Global Planning Office, Merck KGaA

Rafiqul Islam,
Senior Director, Global Bioanalytical Services, Celerion, Inc.

Di Jiang,
Senior Project Management Consultant, Integrated Project Management Company, Inc.

Elayne Ko,
Director, Portfolio and Decision Analysis, Pfizer

William Korinek, Ph.D.,
Vice President, Worldwide R&D Business Operations, Pfizer

Simone Kraemer, Ph.D.,
Associate Director, Reporting Capabilities, Bristol-Myers Squibb

John LaMattina,
Senior Partner, PureTech Ventures; former President,R&D, Pfizer

Sam Mathew, MBA,
Portfolio Capacity Management Leader, Finance/PMO, Janssen Pharmaceuticals

Maureen McNamara,
Executive Director, Global Project Management, Merck Research Laboratories

Carlos Nunes,
Director, Portfolio & Decision Analysis, Portfolio & Commercial Operations, Pfizer

John Phillips,
Director, Capital Efficiency, Business Valuation Consulting, Deloitte Transactions & Business Analytics

George Santangelo, Ph.D.,
Head, Office of Portfolio Analysis (OPA) , Division of Program Coordination, Planning, and Strategic Initiatives (DPCPSI), NIH

Michael Shires,
Vice President, Program and Portfolio Management, Baxter Healthcare

Tom Stone,
Lecturer in Business, Penn State University, Abington College

Bennet Vallet,
Director, Product Development, Siemens

Phil Wolf,
Senior Vice President, Enterprise and On Demand Products, PDWare

Daniel Zweidler, Ph.D.,
Senior Fellow, Mack Institute for Innovation Management, The Wharton School, UPenn; President, DZA, Inc.

"PORTFOLIO AND RESOURCE OPTIMIZATION ARE THE MOST IMPORTANT YET LEAST UNDERSTOOD ASPECTS OF BUSINESS TODAY. CHI GETS EXECUTIVES, PRACTITIONERS AND TECHNOLOGY PROVIDERS IN THE SAME ROOM TO SHARE, LEARN AND MASTER THE COMPLEXITY OF PPM."

- VP Global Marketing & Bus Development, the GenSight group

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Project Portfolio Management Certification Master Class

THURSDAY, NOVEMBER 6 & FRIDAY, NOVEMBER 7, 2014

We are pleased to invite you and your team to attend CHI's and the BioPharma Strategy Series' Project Portfolio Management Certification Master Class being held November 6-7, 2014 at the Hyatt Penn's Landing in Philadelphia, PA. The course is being led by Dr. Richard Bayney, President & Founder of Project & Portfolio Value Creation.

The Master Class will be held in conjunction with the 12th Annual Strategic Resource Management and 9th Annual Portfolio Management conferences, taking place November 3-5, creating a five-day event (Nov. 3-7) covering the topics most important to you (see map below).

HOW THIS MASTER CLASS IS DIFFERENT:

- This course begins with well-founded decision analysis and portfolio theory and quickly moves to practical implementation and executive decision-making
- Principles learned in the master class can be used in business right away
- Unlike other portfolio management courses that focus on portfolio value creation and project prioritization techniques, this master class takes a comprehensive approach to portfolio value maximization using cutting edge methodologies
- Learn how to use the right portfolio analysis to influence corporate decision-makers as well as the strategic and financial direction of your company

WHO SHOULD ATTEND:

Pharmaceutical and biotech industry professionals involved in:

- R&D
- Project management
- Portfolio management
- Strategic and business planning
- Product development
- Marketing and business development
- Finance

WHAT YOU WILL LEARN:

- The CREOPM™ framework, a proven, step-by-step approach to positioning portfolios for short, medium and long-term success
- Categorize project investments into non-discretionary and discretionary buckets
- Analyze risk and assess overall probability of success
- Evaluate assets using four critical drivers – value, 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 M.Sc. and Ph.D. from University of London, MBA from Columbia University, and PMP from the Project Management Institute.

To Register and to Obtain Group Discounts:

Contact our Registration department at 781-972-5400 or Toll-free in the US 888-999-6288.

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MONDAY, NOVEMBER 3

8:00 am Registration and Morning Coffee

IDENTIFIYING THE KEY CHALLENGES FOR BIOPHARMA R&D TODAY

9:00 Organizer's Welcome

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

9:05 Chairperson's Opening Remarks

Jonathan Freeman, Ph.D., Senior Vice President, Head of Portfolio Management, Merck Serono

9:15 KEYNOTE PRESENTATION: Challenges Facing the Biopharmaceutical Industry

John LaMattina, Senior Partner, PureTech Ventures; former President of R&D, Pfizer

Ironically, despite the tremendous opportunities that now exist in biopharmaceutical R&D, the industry is facing the most challenging time in its history. There are two different aspects to these challenges. The first involves higher hurdles to R&D success due to the need to prove to the FDA and payers the value of new medicines. The second is the industry's poor reputation. Both of these issues will be addressed.

10:00 Practical Resource Management Lessons Learned, Baxter's Story

Michael Shires, Vice President, Program and Portfolio Management, Baxter Healthcare

This presentation will share how we: determined the optimal strategy, timing and techniques for portfolio, project and resource management at Baxter; documented those lessons learned to prevent future challenges and continue successful outcomes; integrated project and portfolio management capabilities to effectively build for the future; and developed benchmarking methods to adapt to shifts in the pharmaceutical industry.

10:30 Coffee Break

CAPACITY PLANNING AND PERFORMANCE TRACKING

11:00 Leveraging Resource Planning and Pipeline Operations to Deliver on Strategic R&D Goals

Greg Bayer, Group Director, R&D Scheduling & Resource Management, Bristol-Myers Squibb

Ensuring successful delivery of our pipeline is key to enabling our BioPharma enterprise and our evolving strategy. Strong delivery first relies on planning effectively to "right-size" the portfolio given fixed budget and resources to ensure delivery of our pipeline within budget, but also not leaving budget or resources underutilized. It also requires managing changes as they occur across our 60+ compounds, particularly where we have strategic imperatives. This presentation will provide insight into our operational capabilities that enable our strategy, with examples of how we re-establish our portfolio budget annually, how we recently established a resource plan for a high priority program, evaluated and resolved resource gaps across our regulatory submissions, operationally plan for a globally distributed clinical trial portfolio, and track and improve the on-time performance of our clinical trials.

11:30 Leveraging Resource Management to Drive Your Operating Plan

Sponsored by PDWARE

Phil Wolf, Senior Vice President, Enterprise and On Demand Products, PDWare

11:45 Co-Presentation: Integration of Kanban and Finance in Development of IT Solutions at Siemens Health Services

Bennet Vallet, Director, Product Development, Siemens

Tom Stone, Lecturer in Business, Penn State University, Abington College

Siemens Health Services is one of the first large-scale R&D organizations to utilize the Agile development process along with the Kanban method for improving the "flow" of the development process. We are now able to measure the cost of inputs and the cost and volume of outputs and identify the work-in-process costs associated with bottlenecks in the R&D process. While our initial implementation looked strictly at the development process, we are now launching a project to apply the Kanban method across our whole value stream. The audience will learn that by understanding flow—and more importantly the metrics of flow—they would be able to take specific actions to improve overall predictability and process performance. The reason these flow metrics are preferable to traditional agile metrics is because they are much more actionable and transparent.

12:30pm Luncheon Presentation: Increasing the Value of Your R&D Portfolio with Planisware Analytics

Sponsored by Planisware

William Ramos, Executive Consultant, Planisware USA

Your organization has been diligently scheduling projects, forecasting resources, estimating expenses, and tracking progress and risks. How can you inspect this body of information to transform data into decisions? In this presentation, William Ramos will review a selection of simulation, modeling, and optimization techniques in Planisware that provide insight for R&D organizations to make better informed, data-driven project and portfolio level decisions, to ultimately increase the value of your portfolio.

INTELLIGENT OUTSOURCING FOR IMPROVED RESOURCE MANAGEMENT

1:40 Chairperson's Remarks

Scott Babler, Strategic Realization Manager, Integrated Project Management Company, Inc.

1:45 Project and Portfolio Management for Clinical Outsourcing

Arkady Gusev, Ph.D., US Operations Head, Biomarker Development (BMD),

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Translational Medicine, Novartis Institutes for BioMedical Research, Inc.

This presentation will share an approach for project-portfolio management of clinical assays and biomarkers outsourcing. The presentation will address our strategy, the value proposition, details of the project, management of assays carried out by external service providers, integration with the clinical portfolio, and differentiation between in-house and outsourced portfolio management. Other critical elements including quality and regulatory compliances and their integration into the project-portfolio management will be presented.

2:15 CRO-Pharma Co-Presentation: Intelligent Outsourcing for Improved Resource Management

Part 1: Unleashing Partners & Networks: Intelligent Outsourcing for Improved Resource Management – A CRO Perspective

Rafiq Islam, Senior Director, Bioanalytical Services, Celerion

There is an accelerating trend in the biopharmaceutical industry of R&D outsourcing to CROs and other service providers. The number of suppliers (i.e. CROs and service providers) and type of offerings has also increased significantly. This growing number of supply alternatives means a wider range of the quality and cost of service. Designing the right global portfolio of R&D partners and service providers has become increasingly complex and inefficient. As a result the strategic, operational and financial benefits of R&D outsourcing often remain untapped. This presentation will provide a CRO prospective on how to set up and effectively utilize a network of partner service providers to dramatically improve R&D performance.

Part 2: Intelligent Outsourcing that Enables Right Decision at Right Time with Reasonable Cost

Ling He, Director, Clinical Bioanalysis, Daiichi Sankyo Pharma Development

The pharmaceutical R&D organizations have been increasingly challenged to "do more with less." As a mid-size pharmaceutical company, effective outsourcing is an essential part of Daiichi Sankyo's clinical development strategy. The author will share insights and perspectives, including value considerations, regulatory framework, and quality attributes regarding outsourcing of specialty lab work (such as clinical bioanalysis and biomarkers), and discuss the guiding principle of "right decision at right time with a reasonable cost."

3:15 Sponsored Presentations *(Opportunities Available)*

3:45 Refreshment Break in the Exhibit Hall

4:30 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.

Topics may include:

- Designing and tailoring strategic and flexible resource management systems specifically for pharma R&D
- Applying weights to quantitative and qualitative criteria for improved decision making
- Incorporating a globalized workforce and other resourcing options (off-shoring, in-sourcing, in-out licensing and risk-sharing) into capacity management
- Building partnerships between project management, resource management, functional management, and finance to drive productivity
- Resource management: centralized vs. decentralized
- Achieving more effective and real-time portfolio management and resource allocation

5:30 Welcome Reception in the Exhibit Hall

6:30 Close of Day

TUESDAY, NOVEMBER 4

7:30 am Registration

BIG DATA TO IMPROVE DECISION MAKING AND FORECASTING

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

8:25 Chairperson's Remarks

Charles Alsdorf, Director, Capital Efficiency Services, Deloitte

8:30 Big Data and Analytics for Pharma: Enabling Improved Forecasting and Decision Making

Sam Mathew, MBA, Portfolio Capacity Management Leader, Finance/PMO, Janssen Pharmaceuticals

9:00 A Closer Look at Big Data and Analytics to Improve Drug Development Performance

Krish Ghosh, Ph.D., MBA, Vice President, Informatics, Covance

Big Data is one of the hottest buzz phrases among pharmaceutical executives today. They recognize that the implications of utilizing big data in a way that will benefit the business cannot be ignored, specifically in the areas of portfolio/

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resource management and forecasting. Exploring the use of big data through utilization of such capabilities as data analytics and data mining, gives companies the opportunity to discover new insights among existing information that can enable improved forecasting and portfolio decision making, in ways that may have been unattainable until now.

9:30 Finally! Rough-Cut Portfolio Planning Fast Enough for Any Boardroom

Sponsored by ProModel

Kurt Shampine, Senior Vice President, Life Sciences Solutions, ProModel Corporation

This presentation will demonstrate a new way to do conduct rapid rough cut portfolio planning, live during any meeting. Capabilities covered will include: importing portfolio planning data, determining which new initiatives make it into the portfolio, starting new projects at the right time to meet goals, and choosing and scheduling project within capacity.

9:45 Coffee Break in the Exhibit Hall

ADDRESSING R&D CRISIS WITH OPTIMAL PROJECT PORTFOLIO MANAGEMENT

10:30 Co-Presentation Case Study: Standardizing the Resource Forecasting Algorithm into a Development Process

Simone Kraemer, Ph.D., Associate Director, Reporting Capabilities, Bristol-Myers Squibb

Jennifer Daubenspeck, Ph.D., Manager, Reporting and Capabilities, Bristol-Myers Squibb

It took over 9 months to develop and deploy a resource forecasting algorithm at BMS. This protracted process was hindering the adoption and expansion of the project and resource management processes and tool. BMS standardized the process and the supporting tool equation to shorten the development and deployment process to 3 months or less.

11:00 Utilizing Qualitative and Quantitative Approaches to Improve Portfolio Decision Making in a Collaborative Approach Between R&D and Commercial

Maureen McNamara, Executive Director, Global Project Management, Merck Research Laboratories

"YEAR AFTER YEAR, CHI'S STRATEGIC RESOURCE AND PORTFOLIO MANAGEMENT CONFERENCE OFFERS A CONSISTENT LINE UP OF RELEVANT TOPICS, PROVIDING INSIGHT INTO INDUSTRY TRENDS. DRAWING EXECUTIVES, PRACTITIONERS AND TECHNOLOGY PROVIDERS ALIKE, THIS EVENT PROVIDES GREAT OPPORTUNITIES FOR INTERACTIVE DISCUSSION AND LEARNING."

Director of Marketing, Planisware

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11:30 PANEL: Addressing R&D Productivity Crisis Leveraging Portfolio Management and the Partnership between R&D and Commercial

R&D productivity crisis needs to be addressed in terms of both its efficiency and its effectiveness; optimal Project Portfolio Management can help significantly in this endeavor. In addition, the early establishment of a partnership between R&D and Commercial is critically important; in fact already in the preclinical phase, the commercial perspective (especially in terms of market access) can be instrumental in guiding important decisions. Key discussion points include:

- Is the FIPCo (Fully Integrated Pharmaceutical Company) model still viable in the drug industry?
- How best define the value of a new drug years before its launch?
- How can drug companies launch globally new products and satisfy payors with different standards of care and different needs?
- How can shared goals be created between R&D and Commercial to ensure that R&D 'pushes' what Commercial 'pulls'?
- An alternative business model to the R&D productivity crisis - Disease Management

Moderator: Melquiades de Jesus, Director, R&D Operations, Bristol-Myers Squibb

Maureen McNamara, Executive Director, Global Project Management, Merck Research Laboratories

David Parker, Ph.D., Vice President, Market Access Strategy, Precision for Medicine

Sydney Edwards, Ph.D., Head, Portfolio Management, Allergan, Inc.

Sultan Aziz, Senior Director, Capacity Management, Janssen Pharmaceuticals

BUSINESS AND OPERATIONAL MODELS

Shared Session between Strategic Resource Management & Portfolio Management

12:15 pm Welcome PORTFOLIO MANAGEMENT Conference Registrants & JOINT SESSION Luncheon Announcements

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

12:30 Luncheon Presentation: Discover the Strategy Hidden in Your Portfolio and Decide if It Is the Strategy You Want

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

Sponsored by enrich

This presentation will focus on three key points: How to identify the strategic dimensions of your portfolio; How to assess depth and strength in each strategic dimension; and How to build a portfolio assessment the entire company will believe, support, and act upon.

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

Sultan Aziz, Senior Director, Capacity Management, Janssen Pharmaceuticals

1:30 Going Big! Establishing End-to-End Integrated Project & Resource Planning across Pfizer

Joseph Billitti, Ph.D., MBA, Executive Director, Strategy and Operations, Global Research & Development, Pfizer

In 2011, Pfizer committed to transforming its R&D engine and to a multi-year effort that would modernize and integrate our R&D project planning and resource management capabilities across the enterprise. In its third year, the program has now established foundational and industry leading capabilities across the entirety of R&D, including integrated end-to-end planning, resource forecasting and tracking, and holistic portfolio reporting. This session will discuss Pfizer's implementation approach across many large and diverse functions, including the approaches to our discovery and generics portfolios. Examples will be covered of how the capabilities are being utilized across the business, and highlight the overall benefits being realized from having an integrated platform.

2:00 Implementation of R&D Operations within Merck Serono

Hartmut Hein, Ph.D., Director, Global Planning Office, Merck KGaA

How to best align the book of work which needs to be delivered considering the constraints of internal resources and overall R&D budget is still a key topic within Pharma R&D. At EMD Serono we are currently running a change project to establish an integrated R&D operations environment to align project, resource, finance and portfolio management. First delivery will be achieved by end of August. Experience with first achievements and challenges focusing on resource demand to deliver the book of work will be presented.

2:30 NASA's Human Health and Performance Business Model to Accelerate Innovation

Jeffrey Davis, M.D., Director, Human Health and Performance (HH&P), CMO, NASA Johnson Space Center

Dr. Davis will describe the new business model for the NASA Human Health and Performance (HH&P) Directorate. The 2007 and 2012 strategic plan charted a course accelerating innovation through strategic partnerships and the NASA Human Health and Performance Center (NHHPC) was established in 2010 (now with 6 active projects and over 140 members). NASA's HH&P ran pilot programs in open innovation in 2009-2012 with outstanding results and now conducts prizes for NASA and other federal agencies through the Center of Excellence for Collaborative Innovation (CoECI). Through a rigorous risk management process, the HH&P research and development portfolio is completely expressed through deliverables – partnerships and open innovation tools are deployed where inadequate knowledge, technology or resources may be hindering progress in risk mitigation.

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3:00 PANEL: Driving Innovation in R&D Organizations

Moderator: *Daniel Zweidler, Ph.D., Senior Fellow, Mack Institute for Innovation Management, The Wharton School, UPenn; President, DZA, Inc.*

Panelists: *Joseph Billitti, Ph.D., MBA, Executive Director, Strategy and Operations, Global Research & Development, Pfizer*

John LaMattina, Senior Partner, PureTech Ventures; former President of R&D, Pfizer

Jeffrey Davis, M.D., Director, Human Health and Performance (HH&P), CMO, NASA Johnson Space Center

Carmel Egan, Ph.D., Vice President, Project Management, Eli Lilly & Co.

Jonathan Freeman, Ph.D., Senior Vice President, Head of Portfolio Management, Merck Serono

Over the last decade we have witnessed an exponential increase in marginal costs of innovation in the biopharma sector, as well as a foreseen paradigm shift from blockbusters to precision medicine. These two powerful forces call for a new sustainable business model for the healthcare ecosystem in general and R&D in particular

- What is the role of collaborative innovation in today's R&D environment?
- When is it the right time to invest in a disruptive technology and how?
- How do payers (private or public) influence R&D choices?
- What will today's "Big Pharma" look like in 20 years?

3:45 Refreshment Break in the Exhibit Hall

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.

5:15 Close of Strategic Resource Management **Executive Forum (**Portfolio Management **continues on through Wednesday, November 5)**

WEDNESDAY, NOVEMBER 5

7:30 am Registration

OPPORTUNITY EVALUATION

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

8:25 Chairperson's Remarks

Carlos Nunes, Director, Portfolio & Decision Analysis, Pfizer

8:30 Analyzing Investments in Biomedical Research at NIH

George Santangelo, Ph.D., Director, Office of Portfolio Analysis (OPA), Division of Program Coordination, Planning, and Strategic Initiatives (DPCPSI), The National Institutes of Health (NIH)

One of the activities of DPCPSI is to identify and analyze emerging scientific opportunities, rising public health challenges, or scientific knowledge gaps that merit further research. Though most drug targets are members of a few well-known protein families—G-protein coupled receptors (GPCRs), nuclear receptors (NRs), ion channels, protein kinases, and proteases—roughly 6,000 members of these families are at best poorly annotated. Analytics can be used to prioritize efforts to address this major gap in knowledge.

9:00 How Likely Is a New Product to Become Profitable? The Encouraging Evidence from Products Launched this Century

John Ansell, Senior Partner, Commercial, TranScrip Partners

One of the most difficult aspects of defining commercial potential for a future product is to assess whether it is likely to become profitable. This is more difficult for external than for internal projects because less data is at hand. The latest Tufts Institute data suggest that only 20% of new products launched will become profitable. The presentation explains new research showing that 40-50% of products actually become profitable.

9:30 Innovation: Ideation to Fruition in Healthcare

Sponsored by UMT Consulting

Keith Friend, Ph.D., Senior Director Medical Affairs, Otsuka (OAPI)

Innovation is a challenging process, particularly in a highly regulated industry like Pharma. In the age of social media and digital apps, Pharma has to cleverly navigate regulatory constraints to bring interesting projects to reach key stakeholders through hitherto unexplored channels. Best practices should include collaborative work by a cross-functional matrix team of Medical, Commercial and Compliance team members with clear definition of common goals and a flexible and responsive project management approach.

10:00 Coffee Break in the Exhibit Hall

10:40 Balancing Portfolio Prioritization: A Case Study in Optimizing Life Cycle Project Selection

Sponsored by IPM Integrated Project Management

Scott Babler, Strategic Realization Manager, Integrated Project Management Company, Inc.

Product lifecycle projects are an important aspect in preserving product portfolio value. Competition for resources from new product development often limits the focus on current products, which provide today's revenues. This competition often results in the same resources being stretched between high-priority development efforts and current product quality and efficiency improvements. This case study addresses one large organization's struggle and solution for creating a better process to balance project resources within the portfolio.

11:10 Evaluating R&D Projects under Two Different Business Models: Discrete and Continuous Revenue Realization

Elayne Ko, Director, Portfolio and Decision Analysis, Pfizer

Tom Stone, Lecturer in Business, Penn State University, Abington College

While pharmaceutical companies operate under the discrete revenue realization business model with the R&D projects, there are technology-based companies with a licensing-fee-based business model that would require a different approach. Understanding and evaluating the specific investment dollars and the eventual revenue generation for the continuous revenue / licensing-fee based business model is challenging, and the presentation discusses potential ways to address the issues.

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11:40 The Effects of M&A and Licensing on Driving Portfolio Value

Sponsored by Deloitte.

John Phillips, Director, Life Science Lead for Capital Efficiency Practice, Business Valuation, Deloitte Transactions and Business Analytics LLP

Hector Calzada, MBA, Managing Director, Corporate Finance, Deloitte Transactions & Business Analytics, LLP

12:10 Luncheon Presentation *(Sponsorship Opportunity Available)* **or Lunch on Your Own**

PREDICTIVE MODELING, SIMULATION AND PORTFOLIO OPTIMIZATION

1:25 Chairperson's Remarks

Hartmut Hein, Ph.D., Director, Global Planning Office, Merck KGaA

1:30 FEATURED PRESENTATION: Breaking Pharma Portfolio into Asset Classes: The Role of Differentiation in Risk/Reward Management

Jonathan Freeman, Ph.D., Senior Vice President & Head, Portfolio Management, Merck Serono

Merck Serono has implemented a new portfolio management model that assesses project opportunities in the context of both their individual and asset class risk. This is a very innovative and pragmatic way to look at portfolios and maximize value while decreasing risk.

2:15 Simulation & Optimization Capability in the Pharmaceutical Project Management Environment

Sultan Aziz, Senior Director, Capacity Management, Janssen Pharmaceuticals

Capacity and demand forecasting methodology and process is well established within the pharmaceutical industry. While the tools used to generate this data may differ, the overall objectives are somewhat clear. The bigger opportunity, however, lies in predictive modeling and simulation & optimization capabilities. Effective utilization of simulation and optimization capabilities should lead to increased throughput and value of the pipeline.

2:45 Portfolio Analytics to Support Strategy

Sydney Edwards, Ph.D., Head, Portfolio Management, Allergan, Inc.

One of the goals of most firms is to maximize the value of the portfolio of projects against one or more business objectives. This presentation will examine some of the analytic methods used in Allergan portfolio management. It will include NPV analysis, value for money analysis and explicit strategic objectives.

3:15 Portfolio Investment Scenario Planning: Computing Outcome Distributions to Compare/Contrast Investment Risk

Carlos Nunes, Director, Portfolio & Decision Analysis, Pfizer

The composition of a drug development portfolio is most often initiated by selecting the projects with the highest risk-adjusted Net Present Value (NPV) and/or Internal Rate of Return (IRR). Although point estimates of a project's risk adjusted NPV and IRR offer a good base reference for portfolio investment decisions, to make more informed investment decisions, the variability inherent in each of these metrics given the variability in the underlying project valuation components (development milestone dates, probability of technical and regulatory success by phase, development and commercial costs and projected revenues) presents a need to look deeper into the range of metrics outcomes that a selected portfolio might yield. This talk will step through the thought processes and techniques for looking at several portfolio investment alternatives and to consider how different investment decisions might be made given greater knowledge of the range of portfolio outcomes.

3:45 Communicating Uncertainty in Your Portfolio

Philip Fahringer, Analyst, Center for Innovation, Lockheed Martin

Short description: Portfolios are comprised of, by definition, a mix of assets. Each of these assets, whether it's a stock portfolio or a pharmaceutical portfolio, or any portfolio, has a set of uncertainties common to those elements in the portfolio. Too often, when a portfolio is optimized, the uncertainties of the elements are not clearly represented; and therefore, the portfolio effects are not always well understood. This presentation will demonstrate how to represent the uncertainties as vectors that are clearly visible, how correlations between the elements can be shown graphically, and how different uncertainty assumptions for the elements impact the overall portfolio outcomes.

4:15 Chairperson's Closing Remarks

4:25 Close of Portfolio Management Executive Forum (Project Portfolio Management Certification Master Class continues on Thursday-Friday)

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Hyatt Regency Philadelphia at Penn's Landing
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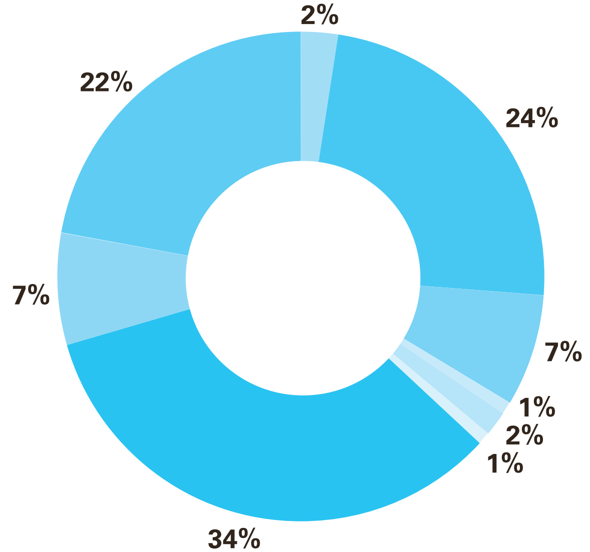

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