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# CBI's Pharmaceutical and Biotech Decision Support and Analysis Summit

## Leverage Strategic Information to Create a Sustainable Market Advantage

November 8-9, 2004 • Sheraton Society Hill Hotel • Philadelphia, PA

Featuring Three Focused Tracks on:



**Market Research**



**Forecasting  
and Modeling**



**Competitive Intelligence**

Over 40 Pharmaceutical Experts  
Present Industry-Specific Models  
of Data Collection and Analysis:

**AstraZeneca Pharmaceuticals**

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**Amgen, Inc.**

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**Biogen-Idec**

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**GE Healthcare Biosciences**

**Genzyme**

**Johnson & Johnson**

**Merck & Co**

**Organon**

**Ortho-McNeil Pharmaceuticals**

**Takeda Pharmaceuticals**

**Vertex Pharmaceuticals**

**Wyeth Pharmaceuticals**

### Day One Keynotes By:



Mark Murcko, Ph.D.,  
Vice President and Chief Technology  
Officer, **Vertex Pharmaceuticals**

*"How to Derive the Most Value from  
Your Information"*



Rich Daly,  
Senior Vice President of Marketing,  
**Takeda Pharmaceuticals**

*"Transform Data and Recommendations  
into Strategic Marketing Intelligence"*



John Yurechko, Ph.D., Director for  
Science and Technology, **The National  
Counter Intelligence Executive**

*"Business Applications of the National  
Counterintelligence Strategy"*

### Day Two Keynote By:



Richard Bayney, Ph.D., Vice President,  
Decision Analysis & Portfolio  
Management, **Johnson & Johnson**

*"Create a System of Accountability  
for Decision-Making"*

### Tracks Chaired By:



Kathryn Jones, Vice President,  
Business Performance Metrics,  
**Wyeth Pharmaceuticals**



Raymond Suehnholz, Vice President of  
New Business Development,  
**Ortho-McNeil Pharmaceuticals**



Clifford Kalb, Vice President,  
Life Sciences, **Wood Mackenzie, Inc.**;  
Past President, **SCIP & PBIRG**

Choose From FOUR Pre-Conference Workshops — Monday, November 8, 2004

**A. Innovative Technologies  
for Data Analysis and  
Decision Empowerment**

**B. ROI Models to Measure  
Return on Resource  
Allocation Decisions**

**C. Through the Looking  
Glass – Generating Future  
Proof Solutions with  
Scenarigames**

**D. Construct a Sound  
Plan for Global  
Market Research**

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## Innovative Technologies for Data Analysis and Decision Empowerment

Technological advances can help your organization achieve elevated levels of performance and effectiveness, which equates to added business value and differentiation. Central data repositories provide actionable intelligence, derived from the largest and most complex data sources and stores, on a cross-organization level. Learn how to deploy the most functionally complete and scalable solution to facilitate information sharing and data analysis for an insight-driven organization. Improve customer relationships and increase product adoption, penetration and market share by discerning market trends. Strategically measure sales and marketing resource allocation to design and deploy multi-channel customer relationship strategies. Attending this workshop empowers those at your organization with the critical insight necessary to make the most adept decisions to respond intelligently to changing conditions with customers, suppliers and business partners.

7:30 *Workshop Registration and Continental Breakfast*

8:30 *Workshop Leaders' Welcome and Opening Remarks*

### I. **Compile and Extract Data Across Multiple Channels and Touch Points**

- Capture customer interactions across multiple channels including:
  - \* call centers
  - \* products and marketing
  - \* the sales force
  - \* the web
- Manage, synchronize, analyze and coordinate syndicated sales and Rx data
- Compile information derived from co-promotion or co-marketing partners

### II. **Funnel Information — The Challenges and Opportunities of Central Repositories and Corporate Dashboards**

- Know the typical hurdles with dashboard adoption
- Reveal patterns and insights hidden within large volumes of data
- Automate identification of problems and opportunities that might otherwise go undetected
- Identify and notify the most appropriate individuals and provide the information needed for decision-making
- Measure and evaluate business performance across customers, products, sales, marketing and service
- Analyze and improve sales and marketing execution with business intelligence modules

### III. **Customize Views and Applications to Match the User's Business Analysis Requirements**

- Empower each member of an organization with relevant and up-to-the-minute customer and business intelligence
- Derive insight into historical and emerging trends, customer behaviors, physician tendencies and the most likely future outcomes
- Compare and measure up against industry benchmarks

12:00 *Close of Workshop*

*There will be a 30-minute networking and refreshment break at 10:00 am*

### — About Your Workshop Leaders —

**Michael L. Barnes, Ph.D.**, Vice President, Business Intelligence and Consulting, **Dendrite International**, joined Dendrite as part of the acquisition of **Software Associates International, Inc.** (SAI) in 2002. Dr. Barnes joined SAI in 1998 as Vice President of Analytics. The Business Intelligence Division of SAI utilizes diverse and sophisticated analytical methodologies, such as neural networks, fuzzy logic, data mining and other decision support technologies, to leverage corporate and third-party data into information that maximizes the client's return on investments and assets. Dr. Barnes has since taken on an expanded role at Dendrite running the consulting, analytics and business process groups known collectively as Business Intelligence and Consulting. He was previously employed by the pharmaceutical division of **Bayer Corporation**, where he gained extensive pharmaceutical experience in many departments within sales and marketing. While at Bayer, Dr. Barnes worked in Sales Administration, Statistical Modeling and Systems, Strategic Contracting, Managed Care and Marketing Research. Before joining Bayer Corporation, Pharmaceutical Division, Dr. Barnes was a management consultant as well as a software developer. He holds a BA, Magna Cum Laude, Psychology and Social Relations from Harvard University, and MS, M.Phil. and Ph.D. degrees in Psychology from Yale University. Dr. Barnes has over 20 professional publications in peer review journals, on topics that span a wide range of both academic and business interests.

**Daniel W. Mallard, MBA**, Vice President, Data Validation Services, **Dendrite International**, joined Dendrite through the acquisition of **Analytika, Inc.**, in January of 2000. Mr. Mallard joined Analytika in 1997 and held marketing, sales and product development roles. Promoted to Vice President in 2002, Mr. Mallard now focuses his efforts on creating a larger data management business for Dendrite. Before attending business school, Mr. Mallard was an officer in the United States Marine Corps. In his 12 years of service, Mr. Mallard held numerous leadership roles while in the Marine Corps and has extensive experience in Far East, Middle East and European exercises and battle plans. He holds a Masters in Business Administration from the University of North Carolina's Kenan-Flagler Business School and a Bachelor of Science in Political Science from The United States Naval Academy.



## ROI Models to Measure Return on Resource Allocation Decisions

Accurate predictive modeling methodologies for measuring and maximizing ROI are key to the success of a pharmaceutical firm. An exploration of sophisticated promotional mix performance measures, and an in-depth look at optimizing critical promotional tactics reveals the value of a principled and econometrically sound ROI management strategy. Learn to create statistically grounded ROI models and identify tactical investment opportunities that can benefit from optimization by using state-of-the-art quantitative modeling techniques.

7:30 *Workshop Registration and Continental Breakfast*

8:30 *Workshop Leaders' Welcome and Opening Remarks*

### I. The Value of ROI Analysis and Avoiding Misleading Methodologies

- ROI basics — What is a predictive model and when should I use it?
- Why measuring ROI matters and the risks we bear by not doing it
- Distinguishing between reliable and unreliable analyses — What's informative and what's misleading?
- Developing a statistically sound ROI management strategy and championing it in the organization

### II. Sampling Optimization — Putting Your ROI Analysis to Work

- What is optimization and how does it work?
- The critical link between the sales forecast and the call plan
- Avoiding common modeling and optimization mistakes
- The intrinsic value of experimentation — Selling sampling optimization in your organization

### III. Market Mix Models — Integrating Your ROI Management and Optimization Strategies

- Why single tactic optimization takes you only so far
- Multivariate modeling for simultaneous tactic optimization
- Quantitative strategies for extending your optimization strategy to the therapeutic franchise and brand portfolio level
- Accounting for critical implementation factors
- Tracking results and reporting to senior management

12:00 *Close of Workshop*

*There will be a 30-minute networking and refreshment break at 10:00 am*

### — About Your Workshop Leaders—

**Halbert White, Ph.D.**, Founder, **BW Analytics**, is a world-renowned econometrician and a leading expert in predictive modeling and artificial neural networks. Dr. White has more than 25 years of experience providing advanced analytical solutions to both the business and academic communities. His expertise has been successfully applied to solve complex challenges for top companies in the pharmaceutical, investment banking and financial services industries. His widely published and applied techniques have led him to be recognized as a pioneer in his field. Dr. White is also the Chancellor's Associate Professor of Economics at the University of California, San Diego.

**Patrick J. Burns**, Practice Director, **BW Analytics**, has more than 18 years of experience as an executive and consultant in the public and private sectors. He specializes in strategic planning for business intelligence initiatives using modern data mining and decision support systems. Recently, Mr. Burns successfully designed and directed the analysis of promotional spending ROI for a FORTUNE 500 pharmaceutical company. Using RDMS™, and a predictive data mining strategy, the analysis identified an opportunity to increase annual revenues by more than \$50M.

### — WHO SHOULD ATTEND —

**Does your company want to achieve an integrated approach to decision-making? CBI offers the unique opportunity to send a multidisciplinary team at a discount — Register three function leaders and the fourth attends for free.**

Executives with key responsibilities in the following areas will benefit by attending:

- |                               |                           |
|-------------------------------|---------------------------|
| • Business Intelligence       | • Brand Team Leaders      |
| • Competitive Intelligence    | • Information Analysis    |
| • Franchise Analysis          | • Portfolio Planning      |
| • Forecasting                 | • Pricing                 |
| • Market Research/Analysis    | • New Products Assessment |
| • Business Development        | • Librarians              |
| • Technical Intelligence      | • Knowledge Management    |
| • Strategic Planning/Analysis | • Technical Assessment    |
| • Business Planning/Analysis  |                           |

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or Fax 781-939-2490. Register on our website at [www.cbINET.com](http://www.cbINET.com)**



## Through the Looking Glass — Generating Future Proof Solutions with Scenarigames

Scenarios afford an analysis framework that transforms projections about the future into a knowledge platform for strategic action. The framework addresses why the future will be different from the present, what various futures might be and how they might evolve in different ways. Implications for action can then be tested through use of another strategy tool, the wargame or competitive simulation, to elicit potential opportunities as well as lurking threats. This unique workshop explores the combinatorial process of scenarigames by using a real-life example to illustrate the value and process of the concepts. Attendees have an exceptional and in-depth, real-time, hands-on experience using a timely topic of today, the situation in Iraq.

7:30 *Workshop Registration and Continental Breakfast*

8:30 *Workshop Leaders' Welcome and Opening Remarks*

### I. Environmental Analysis Exercise

- Conceptual introduction to environmental dynamics, change driver identification and scenario generation
- Small group application of concepts leading to creation of several base-case scenarios
- Presentation of the scenarios and full group discussion

### II. Company Analysis Application

- Conceptual introduction to facilitated company analysis
- "Company Groups" are created to represent the US Coalition, Al-Qaeda and Radical Clerics
- Small groups conduct a facilitated analysis of their "companies"

### III. Scenarigames Brought to Life

- Conceptual introduction to scenario based competitive simulation
- Small groups determine strategic imperatives for their "companies" in two scenarios
- Scenarigame conducted and analyzed — Discussion points and key learning points reviewed

12:00 *Close of Workshop*

*There will be a 30-minute networking and refreshment break at 10:00 am*

#### — About Your Workshop Leaders —

**Wayne A. Rosenkrans, Jr., Ph.D.**, is the Head of Strategy at **AstraZeneca Pharmaceuticals**. In his current role, he has responsibility for intelligence support for US Commercial, Clinical, R&D operations and for provision of expertise and mentoring to non-US AstraZeneca groups. He is a recipient of the Society of Competitive Intelligence Professionals (SCIP) Fellows Award, and a former President of the Society. Previous positions include Director of US Commercial Intelligence at AstraZeneca, Competitive Technical Intelligence Group Leader and Research Planning Analyst at Zeneca Pharmaceuticals, Director of Strategic Intelligence Systems for **Windhover Information**, Director of Drug Intelligence Systems Sales and Marketing for **Adis International** and Associate Director and Head of Strategic Intelligence for **SmithKline Beecham Pharmaceuticals R&D**. He holds an S.B. in Biology from MIT, a Ph.D. in Cell and Molecular Biology from Boston University and received post-doctoral training in Cancer and Radiation Biology at the University of Rochester.

**Ihor W. Rak, M.D.**, is Global Product Director at **AstraZeneca**.

He received his M.D. from the College of Physicians and Surgeons at Columbia University. Dr. Rak completed medical residency and fellowship training in pediatrics, neurology, epilepsy, clinical neurophysiology and sleep medicine at Children's Hospital of Philadelphia, University of Pennsylvania and University of Virginia resulting in several medical board certifications. He founded and directed a tertiary care and clinical research epilepsy center and a sleep disorders center. Since joining AstraZeneca in 1996, Dr. Rak has held a number of senior medical and business leadership roles in neurologic and psychiatric global drug development. His experience has included disease area strategic planning, business development strategic planning and he is currently Trustee and Vice President of Strategic Planning and Alliances for the American Academy of Pharmaceutical Physicians. He is a Board Member of National Alliance for the Mentally Ill in Delaware and leads the organization's strategic planning.

**Kim Slocum** is Director of Strategic Planning and Business Development at **AstraZeneca Pharmaceuticals** and is involved in both strategic planning and merger/acquisition activities for this multi-national bioscience company. Over his thirty year career in health care, Mr. Slocum has worked in a series of positions in sales, sales training, marketing, new product development, managed care marketing, disease management, health care consulting, strategic planning and externalization efforts for a variety of pharmaceutical, biotechnology and health care firms. Mr. Slocum's interest in strategic issues associated with health care delivery and financing dates back nearly a decade when he supervised the former Zeneca Pharmaceuticals' first strategic planning effort focused on various managed care audiences. He also helped to found **Stuart Disease Management Services**, the former Zeneca's major effort in disease management and spent nearly two years as part of that organization's management team. In line with this interest in a holistic approach to health care, Mr. Slocum is a member of the Board of Trustees of the Texas Health Policy Research Institute. He also recently became a member of the Knowledge Expertise Network for the University of the Sciences in Philadelphia. Also interested in health care information technology, he works with AstraZeneca's exploratory team on the role of the internet in health care and currently serves in the additional role of Director, Strategy and Alliances for the company's US Emerging Business Technologies unit. He is a Fellow Member of the Healthcare Information and Management Systems Society (HIMSS) and is a former member of the Society's Board of Directors. Mr. Slocum earned his Bachelor's Degree at the State University of New York at Geneseo and did his graduate studies in Business at Xavier University.





## Construct a Sound Plan for Global Market Research

Global market research is necessary for growth, yet it is challenging to conduct — Especially given the expansion of the EU to 10 new acceding countries, global market research is a must-have for a competitive pharmaceutical or biotech firm. Additionally, Asian markets offer additional obstacles with the languages, culture and even character sets. Simply understanding the U.S. marketplace is not enough, as insight is needed, in quantitative and qualitative form, from a wide range of countries. This workshop outlines the expected challenges encountered in a global market research rollout, and the workshop leaders provide concrete answers for tackling these hurdles and conducting a sound research project on a global scale.

7:30 *Workshop Registration and Continental Breakfast*

8:30 *Workshop Leaders' Welcome and Opening Remarks*

### I. Typical Hurdles and Constraints of a Global Market Research Project

- Time is critical — The world is rapidly changing, and insight is needed quickly to account for numerous changing variables in the global market
- Orchestration of numerous global agencies is difficult and can be messy — There are alternatives
- Results and methodologies are often inconsistent and unreliable in delivery
- Various countries have various rules, regulations and customs — All must be understood and observed
- Global projects are costly and time consuming

### II. Surmount the Hurdles — Strategies for Rolling-out a Sound and Efficient Global Market Research Plan

- Call center and web-survey strategy:
  - \* where should the call center be located?
  - \* how do you design and implement a centralized approach?
  - \* how many countries and languages can be covered through one call center?
- Interviewer and management structure:
  - \* who should the interviews and supervisors be
  - \* where should they be from?
  - \* how can consistency, quality and deadlines be ensured?

- Questionnaire design:
  - \* language considerations
  - \* culture considerations
  - \* web surveys
  - \* interview techniques, country by country

### III. Case Study Presentation

- Global market research project case example
  - \* challenges and solutions are shared

12:00 *Close of Workshop*

*There will be a 30-minute networking and refreshment break at 10:00 am*

### — About Your Workshop Leaders —

**Harry Bunn** is President and CEO of **RONIN** and founded the company in 1986. Previous to that he managed International Marketing Strategy Divisions in a major management consulting firm. He has led RONIN's focus on global market research including defining the technology used for global data collection and the processes for a global call center and web-survey farm which operates 24 x 7 from a London, England facility covering over 70 countries in local language. Mr. Bunn has a Bachelor's degree in Commerce (Economics) from the University of New South Wales in Sydney, Australia.

**Jess Mathur** has been at **RONIN** since January of 2001 managing the Pharmaceutical Practice in the London office. Previously she worked at **Isis Research** for three and a half years in fieldwork client liaison where she oversaw the management of various global quantitative and qualitative ad hoc health care research studies. Since joining RONIN, Ms. Mathur has managed extensive International pharmaceutical research projects using a mix of methodologies including telephone, web-based and paper surveys. She holds a BA Hons degree in International Politics and French from Manchester University.

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**“You leave this conference with ample new knowledge to incorporate to any company to improve CI/BI/MR and or any other support function.”**

— 2004 C.I. Attendee, Jeannet Maldorado, Manager, Strategic Information, Advancis

## MAIN CONFERENCE

### Day One — Monday, November 8, 2004

12:00 Main Conference Registration

1:15 Chairman's Welcome and Opening Remarks



**Michael L. Barnes, Ph.D.**, Vice President, Business Intelligence and Consulting, **Dendrite International**  
*Dr. Barnes runs the entire consulting, analytics and business process groups known collectively as Business Intelligence and Consulting. He was previously employed by the pharmaceutical division of Bayer Corporation where he worked in Sales Administration, Statistical Modeling and Systems, Strategic Contracting, Managed Care and Marketing Research.*

### Day One Opening Address

1:30 **With So Much Decision Support, Why Don't We Have Better Decisions?**

Never before have we had so much intelligence, gathered so rapidly and precisely, analyzed with such high-powered statistical tools, presented with such compelling graphics. Never before have we had strategists who are so educated, so experienced and so motivated. Given all those advantages, you'd think that strategies wouldn't fail. Yet they do. Performance falls short of targets. Managers scramble to "make the numbers" at the end of the quarter. They are surprised by competitors' actions. They develop glorious plans that sit in binders on shelves. They look back at the end of the year, reorganize, resolve to work harder and smarter and repeat the process. With so much decision support, why don't we have better decisions? Answering that question is what this session is about. How can you put your data, tools and skills to work and create dramatic improvements in bottom-line performance? Learn how!

- How conventional techniques that mean well lead to decisions that fail
- How simulation and war-gaming technologies let you realistically model the actions of your educated, experienced motivated competitors
- How to use what you already know to produce startling insight, commitment and results
- What has happened in real-life pharmaceutical businesses when strategists applied these principles

Come see how you can produce much better strategic decisions for your business.



**Mark Chussil**, Founder and Chief Executive Officer, **Advanced Competitive Strategies, Inc.**

*Mr. Chussil began developing ACS's ValueWar® in 1986. Now one of the world's most-powerful, best-known and time-proven business simulators, ValueWar won the "Best in Class Software" award from Competia in 2002. Mr. Chussil has worked with ACS clients on four continents, including Astra Merck, AT&T Wireless Services, Bell Atlantic (now Verizon), British Airways, DuPont, GlaxoSmithKline, Kodak, Nortel, Novartis, Shell, Sprint, Sprint PCS, USWEST (now QWEST) and Weyerhaeuser. Previously, Mr. Chussil spent 15 years at the Strategic Planning Institute (The PIMS Program), where he was Director, Business-Unit Strategy Research and Director, PC Products. His experience also includes three years in market research and strategy development at Sequent Computer Systems (subsequently acquired by IBM). Mr. Chussil is lead author of Strategy Analysis with ValueWar (Scientific Press, 1993). Mr. Chussil earned his MBA from Harvard University and his BA from Yale University.*

### Science and Innovation Keynote Address

2:15 **How to Derive the Most Value from Information**

This keynote reflects on the value of information, from all sources, as a cornerstone of strategy and decision-making in pharmaceutical research. Properly gathering, curating, analyzing and disseminating information, and applying it to unique new situations, are all daunting problems. This keynote presenter provides insights into the following topics:

- The curation of research data and information — How to do it and what is it good for?
- How to mine the history of pharmaceutical research — What can we learn from the past?
- How can we analyze and understand the worth of chemical intellectual property?



**Mark Murcko, Ph.D.**, Vice President and Chief Technology Officer, **Vertex Pharmaceuticals**

*In his role as Vice President, Chief Technology Officer and Chair of the Scientific Advisory Board of Vertex Pharmaceuticals, Dr. Murcko is responsible for the strategic evaluation, identification and integration of new technologies into worldwide research and development. Prior to being named Chief Technology Officer, he was Vice President and Senior Research Fellow at Vertex. He joined Vertex as a Founding Scientist in 1990 and started the company's molecular modeling, bioinformatics, IS and chemoinformatics groups. He is a co-inventor of Agenerase® and Lexiva®, Vertex's first two marketed drugs, as well as several other compounds in Vertex's clinical pipeline. Prior to Vertex, Dr. Murcko was at Merck in West Point, PA from 1987 to 1990. At Merck, he helped discover multiple clinical candidates against cardiovascular and ocular diseases, including inhibitors of the enzyme carbonic anhydrase for the treatment of glaucoma. One of Merck's development candidates in this area, Trusopt®, became the first marketed drug to result from a structure-based drug design program. Dr. Murcko is a co-inventor on more than 30 issued patents, has co-authored more than 75 scientific articles, and has delivered more than 100 invited lectures. Dr. Murcko currently sits on the scientific advisory boards of several outside companies and has been an editorial board member for many scientific journals including the Journal of Medicinal Chemistry. Dr. Murcko received his Ph.D. in organic chemistry from Yale in 1987.*

3:00 Networking and Refreshment Break

### Marketing Intelligence Keynote Address

3:30 **Transform Data and Recommendations into Strategic Marketing Intelligence**

This keynote discussion explores the value and position of decision support functions within an increasingly competitive and regulated marketplace. Hear the perspective of a senior marketing manager on some of the most pressing issues facing market researchers and marketers alike.

- The critical importance of solid market research and deep market intelligence in positioning products in a hyper-competitive marketplace — What is needed from decision support teams and brand teams to capture optimal return on investment?
- How to best utilize data to make brand, product and portfolio decisions with a quantifiable ROMI
- Messaging strategies for building better brands — How market research data and commercial insight are critical to crafting a targeted message

- What is the intrinsic value of decision support activities, and how can value be better communicated to challenging senior managers?
- Building a sound business case approach for market research, analytic and competitive intelligence activities



*Rich Daly, Senior Vice President of Marketing, Takeda Pharmaceuticals North America, Inc.*

*In his role as Senior Vice President of Marketing, Mr. Daly oversees all of the marketing activities for TPNA's first commercial product in the US - ACTOS® (pioglitazone hydrochloride). Mr. Daly's responsibilities include Brand Marketing (Diabetes, Cardiovascular and Neuroscience), Marketing Analytics and Research, Managed Markets and Hospital Marketing. Mr. Daly also works closely with Takeda's R&D organization in managing all commercial aspects of TPNA's portfolio through the Marketing Department's New Product Planning group. Mr. Daly has held positions in Sales, Managed Care Sales, Brand Management, Market Research, Marketing Operations Management and New Product Planning. In 1983, Mr. Daly earned a Bachelor of Science in Microbiology from the University of Notre Dame. He also has his MBA from Northwestern's Kellogg School of Management.*

## Government Keynote Address

### 4:15 Business Applications of the National Counterintelligence Strategy

In the 21st century, the counterintelligence (CI) challenges confronting the United States have grown more and more complex. Counterintelligence involves more than protecting our nation's secrets; it is an essential component of our overall national security strategy, including homeland defense. And it is based on policies that must reach beyond the government sector into the critical elements of our national infrastructure, into its business and commercial enterprises. This presentation highlights some of the current counterintelligence challenges and recommends a course of action for improving C.I. capabilities in the commercial environment.

- "The Price of Democracy is Eternal Vigilance"
- Intelligence and counterintelligence — What is it and what are the challenges we face in the 21st century?
- Developing a coherent counterintelligence strategy and a plan of action
- Creating an authority and an architecture for implementing a strategy
- Identifying the threat
- Employing both defensive and offensive tactics to achieve strategic goals
- Examining and learning from past failures and successes
- Communications and metrics
- Sustaining the fight



*John Yurechko, Ph.D., Director for Science and Technology, The National Counter Intelligence Executive*

*Dr. Yurechko joined the Defense Intelligence Agency (DIA) in 1981 as an air forces analyst in the Directorate for Research, Soviet/Warsaw Pact Division. He then served as a senior analyst for Soviet military doctrine and strategy in the Political-Military Branch and as a command, control and communications program manager in the Technical Production Office. In 1994, this office was expanded to a division and renamed the Special Planning Support Division. In 1996, Dr. Yurechko was appointed Chief of the newly established DIA Information Warfare Support Office. In February 1998, Dr. Yurechko was promoted to the Defense Intelligence Senior Level*

*(DISL) position of Senior Defense Intelligence Expert for Information Operations. In October 1998, Dr. Yurechko was selected as DIA's first Defense Intelligence Officer (DIO) for Information Operations (IO). As the DIO for IO, Dr. Yurechko represented DIA on several planning and policy working groups and acted as the senior substantive authority and issue manager for all matters related to IO, including cyber security, electronic warfare, psychological operations and computer network operations. In May 2004, Dr. Yurechko joined the National Counterintelligence Executive (NCIX) as the National Counterintelligence Officer for Science and Technology. He received his Bachelor of Arts degree in History from Wesleyan University and earned his Master of Arts and Doctorate in History from the University of California, Berkeley. In addition to his government employment, Dr. Yurechko has taught as an Adjunct Professor in the National Security Studies Program at Georgetown University.*

### 5:00 Elevating the Brand/Product Team and Decision Support Exchange

How can brands and decision support teams exchange and synthesize information better in order to arrive at superior decisions? This panel explores various avenues for fostering an integrated decision-making environment.

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- How to create and sustain interactive and frequent dialogue between brands and decision support teams
- The value of monthly business reviews — Ensure commitment on both ends
- How to share information within companies — What works well and what doesn't?
- How to best utilize the information generated by decision support groups
- Delivering negative or difficult news — How to remain objective and unbiased
- Know and understand the true customer of the group's output

*Moderator: Allen Kamer, Director, Decision Support, Biogen-Idec*



*His group is responsible for product forecasting, market research and sales analytics for the company's Immunology franchise. Prior to his present role, Mr. Kamer served as Associate Director for Market Research and Business Intelligence in Biogen's Global Commercial Strategy group. Mr. Kamer came to Biogen from MORPACE Pharma Group, Ltd., where he was one of seven founding members of the company. He directed MPG's product sales forecasting activities and global physician network. Mr. Kamer also formerly served as a Product Manager for Decision Resources Inc.'s New Product Development group, where he managed the primary research, health economics, and drug pricing components of the company's MarketBase forecasting service.*

*Panelists: Baz Van Cranenburgh, Director of Global Strategy and Market Research, Bausch & Lomb*

*Julia Levy, Vice President of Business Intelligence, GE Healthcare Biosciences*

*JR Buzzelli, Senior Product Manager, Organon*

*Sandy Lauterbach, Director, Strategic Marketing, Genzyme*

5:45 Close of Day One

5:45-6:45

**Networking Cocktail Reception**

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## Day Two — Tuesday, November 9, 2004 (Choose from One of Three Conference Tracks)

### Track A — MARKET RESEARCH

7:30 Continental Breakfast

8:00 Chairman's Review of Day One



*Kathryn Jones, Vice President, Business Performance Metrics, Wyeth Pharmaceuticals*

*Ms. Jones has been working in the pharmaceutical industry for over 20 years. Her career began as a Research Scientist, followed by several years with IMS and as a Director at ISIS and Martin Hamblin. In the late 1980's, Ms. Jones was at ICI Pharmaceuticals transferring to the U.S. for the development of programs for sustaining brand equity. Returning to Zeneca Headquarters in Cheshire, she spent several years as the Leader of International Market Research and Commercial Business Planning for Infection. Ms. Jones came to Wyeth in 1998 and until two years ago, held the position of AVP for Global Business Intelligence. She now leads a Corporate initiative establishing key Business Performance Measurements communicated through highly advanced Executive "Dashboards".*

8:15 **Infusing Market Research into R&D for Early Go/No-Go Decision-Making**

The drug development process consists of a series of decision points, at each of which there is an option to stop or go, or to make other choices with respect to further development including, licensing out. Market research provides important information for early R&D decisions, and for decisions throughout the life of the project up to and including the launch of the drug into the market. In this presentation, the following questions are addressed:

- What "value of information" does market research add in early strategic decisions with respect to drug development?
- How can we capture the sensitivity of the decisions to the value drivers in the forecast?
- How do updates to market research help leverage the downstream options in optimizing an R&D asset?

The presentation helps analysts and decision makers get a better insight into the strategic role of market research in early R&D decisions.

*Vish Viswanathan, Ph.D., Director, Decision Analysis, Johnson & Johnson*

9:00 **Target Profitable Therapeutic Areas to Penetrate**

Knowing the factors and variables that drive the market in which a new product competes can aid in attaining the edge needed to penetrate the market upon launch. Given the competitive climate, unmet needs and status of the market, resources and efforts can be allocated in the most effective way to ensure not only a successful launch, but also exceptional performance of the product throughout its lifecycle. The variables to consider include:

- Market definition, market potential and market dynamics
- Identification of all customers who influence use of your product
- Knowing the current unmet needs of all stakeholders such as health care providers, patients and payors
- Valuing the need
- Future competitive situation
- Attributes, benefits and differentiating features of all products in the therapeutic category



*Neil Rogers, Director, Market Research and Business Analysis, Respiratory, AstraZeneca UK*

9:45 **Tap into the Psyche of Physicians and Consumers for a Polished Product Profile**

New product planning marketing teams and market research have a responsibility during early drug development,

sometimes even prior to clinical trials, to ensure that the development and the commercialization plans deliver a commercially attractive product at launch. The target product profile is the blueprint for the construction of the plan to address unmet medical needs, thus creating value for the end user — the patient. In this session, learn how to:

- Understand current market and the key market dynamics — How to breach the gap between today's market and future market environment?
- Target product profile in early drug development — How to direct drug development efforts towards expected future key drivers?
- Get everyone on board — How to ensure diffusion of market research findings across multiple teams (basic science, clinical, regulatory, marketing etc)?
- Scenario testing and lifecycle management — Maintain continued success in a dynamically changing competitive environment?



*Evlogi Itsev, Analyst and Franchise Business Partner, Merck & Co*

10:30 **Networking and Refreshment Break**

11:00 **Leverage Secondary Data in Market Research for Pre-Launch Products**

Explore how to best utilize secondary data to understand the market for pre-launch products and to inform primary research. Specifically discuss examples of how to leverage secondary data to:

- Identify and size market opportunities
- Understand treatment progressions and the competitive set so that you can outline intended messages and design appropriate clinical trials
- Detailed competitive analysis and profile of competitors' key patient segments
- Identify treatment behaviors and dynamics in the market to influence, such treatment guidelines or use of diagnostic tests
- Develop segmentations and profile priority segments

*Dan Paterson, Vice President Marketing and Corporate Development, Pharmetrics*

11:45 **Realize Brand Potential Using Anonymous Patient-Level Data**

This session focuses on specific examples of how information from APLD affects the ability to impact brand performance from pre-launch positioning through post launch targeting efforts. Advanced APLD metrics complement generalized market share metrics answering important questions such as:

- Is there a market for my product?
- Where are predominant patient populations?
- Who are the target providers?
- Was my pull-through program effective?

*Jamie Schaeffer, Pharm D., R.Ph., Director Client Services, Ingenix*

12:00 **Luncheon Hosted by:**

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## Day Two — Tuesday, November 9, 2004 (Choose from One of Three Conference Tracks)

### Track B — FORECASTING & MODELING

7:30 Continental Breakfast

8:00 Chairman's Review of Day One



*Raymond Suehnholz, Vice President of New Business Development, Ortho-McNeil Pharmaceuticals*

*Mr. Suehnholz is the Vice President of New Business Development and Business Intelligence, CoE at Ortho-McNeil Pharmaceuticals. Mr. Suehnholz began his career with Johnson & Johnson as Manager, Marketing Research with Ortho Pharmaceutical. Mr. Suehnholz also served a two-year term as President of the Industry's Pharmaceutical Marketing Research Group (PMRG). Mr. Suehnholz formed and led a Business Analytics function for the Strategic Marketing Group in the Johnson & Johnson Pharmaceutical Sector. Later, Mr. Suehnholz returned to Ortho-McNeil as the newly appointed VP of Business Analytics and Assessments. In March of 2003, Mr. Suehnholz was named the Vice President, New Business Development and was appointed to the Ortho-McNeil Management Board. Mr. Suehnholz earned a BS degree in Pharmacy and an MBA from Rutgers University.*

8:15 **Create Accurate Expectations for Management and Wall Street**

The pharmaceutical industry has historically achieved some of the highest annual growth percentages of any industry. However, double-digit growth has become much more difficult to sustain, as blockbusters are few and far between and the pressures for innovation mount. Nonetheless, management and investor expectations for high growth continue, creating pressure to deliver on expectations with robust and promising forecasts. Discuss these challenges facing forecasters, and hear ways to balance expectations with reality.

- Balance out investor's expectations with realistic benchmarks and forecasts
- How to maintain efficiency and accuracy in your forecasting techniques
- Measure the accuracy of a forecast with reliable models
- Continually validate a revised forecast to maintain or update expectations
- Determine the —
  - \* role of an effective forecaster in different settings
  - \* users of the forecast
  - \* information needs of management/users
  - \* format for delivery of the forecast
  - \* summaries/syntheses that will help user understand forecast message

*Farong Li, Forecasting Director, Amgen, Inc.*

9:00 **Use Commercial Analytics to Strengthen and Accelerate New Products, Licensing and R&D Output**

Market research and forecasting are powerful tools that successful pharmaceutical companies use to enhance the product development and strategic commercialization processes, including determining where to invest their resources. This session explores how to:

- Use market research to check the practical feasibility of human trials and enhance their time-lines
- Understand how market research and business analysis are used to value R&D or licensing opportunities
- Leverage market research and business analysis approaches to decide on the trade-off between the robustness of indications
- Develop an organization-wide approach to strategic forecasting



*Dean A. Slack, Director, Strategic Analysis, Bayer Pharmaceuticals*

9:45 **Modeling to Optimize the Promotional Mix**

Brands not only have to compete with traditional competitors, but also have to compete with other brands within their own company for promotional funding. Examine the guidelines, critical to creating and forecasting the optimal promotional mix, in order to help you derive the most dollars from your marketing budget. Learn how to:

- Obtain the best measures of promotional effectiveness
- Utilize common metrics across promotional fronts:
  - \* prescriptions \* market share
  - \* dollars — drill down to dollars to evaluate bottom-line effect
- Combine metrics across products and promotional campaigns
- Create response measurements, i.e. sales response curves
- Consider strategic objectives
- Optimally allocate promotional spending

*Satish Medakkar, Director of Market Research, Bristol-Myers Squibb*

10:30 *Networking and Refreshment Break*

11:00 **Forecasting Strategies for New Indications and Line Extensions**

New line indications and product innovation expands the variety of therapeutic choices and attributes available to consumers. How is the decision to expand into a new indication determined, and what is needed from a forecasting perspective in order to make that decision sound and strategic?

- Conduct in-line analysis for current drugs — Ensure that past decisions reflect current and future market drivers
- Analyze the historical market for each therapeutic area and apply future trends
- Accurately predict the evolution of the market and quantify the revenue stream of a new indication

*Kai Trepte, Co-Founder and Vice President of Sales, John Galt Group*

11:45 **Quantify the Impact of Generic Erosion**

In order to overcome the increasing challenges of thinning ROI, pricing pressures and generic competition, pharmaceutical companies must adapt to changing conditions with certainty and clear expectations. As generic competition lingers ahead, forecasters play a key role in quantifying and communicating the imminent impact of generic introduction, allowing the organization ample time to adjust and redefine strategy. Learn how to:

- Map out strategies to recoup sales lost as patent expires
- Assess the effects of strategies on future revenues
- Examine the effects of OTC availability on the overall market in which you compete
- Forecast the market scenario 5, 10 and 15 years down the line

*Thomas Buchholz, Partner, Simon-Kutcher*

12:00 *Luncheon Hosted by:*

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## Track C — COMPETITIVE INTELLIGENCE

7:30 Continental Breakfast

8:00 Chairman's Review of Day One



Clifford Kalb, Vice President, Life Sciences,  
**Wood Mackenzie, Inc.;** Past President, **SCIP & PBIRG**

Mr. Kalb has twenty-nine years experience in the pharmaceutical industry, holding a series of positions of increasing responsibility in sales, marketing research, health economics, public policy management, marketing management, licensing, business intelligence and business development. In addition to working for large corporations such as **Marion, Pfizer and Hoffmann La Roche**, Mr. Kalb has acted as an industry consultant and headed the marketing and business development function for a small biotechnology company. He most recently held the position of Senior Director, Strategic Business Analysis in the Worldwide Human Health Marketing department of Merck & Co., Inc. He is past President, of the Board of Directors of the **Society of Competitive Intelligence Professionals (SCIP)**. He has also served as past Chairman of the **Conference Board Council on Competitive Analysis**, and past President, **Pharmaceutical Business Intelligence and Research Group**.

8:15 Quantifying the Bottom Line Impact of C.I.

With tightening budgets and increased pressures to prove ROI, quantifying the benefits of C.I. is imperative. This presentation focuses on case examples and techniques for expanding the C.I. function within one of the largest pharmaceuticals companies in the world today. The concepts and strategies used to position the growth of the C.I. function within this organization are explored. C.I. professionals can increase their profile within their organizations.

- Understand what drove the formation of C.I. units within the pharmaceutical and biotechnology arena
- Explore concepts used to quantify the benefits that C.I. provided that improved the bottom line performance of the company
- Receive insights on techniques used to raise senior management's awareness of the impact that the C.I. function had on the bottom line performance of the company

Daniel Pascheles, Ph.D., Vice President, Head of Competitive Intelligence,  
**Aventis Pharmaceuticals**

9:00 Building Human Intelligence Activities in an Organization

Human intelligence is a critical tool to building a strategic picture of market and competitor activity. However, it can be seen as time consuming and a distraction from people's "day jobs". This session takes you through the experiences with gaining organizational buy-in and involvement in human intelligence by looking at:

- Competencies and resources required
- Infrastructure and processes developed
- Cultural changes, fundamental increasing human intelligence activity
- Demonstrated results and business impact that enabled C.I. advancement



**CASE STUDY**

Julia Levy,  
Vice President of  
Business Intelligence,  
**GE Healthcare Biosciences**



John McDonald-Dick, Senior  
Business Intelligence Analyst,  
**GE Healthcare Biosciences**

9:45 Delivering C.I. to Internal Clients for High-Level Influence and Strategic Decision-Making

Running through the veins of the pharmaceutical industry is the lifeblood shared by all — scientific innovation, accelerated R&D, aggressive business intelligence, speed to market and effective sales and marketing in the face of increasing pressures

on our ability to promote new products. Gaining a competitive edge is key to all of these components, making the C.I. function of utmost importance. To protect against the constraints of budget and corporate cutbacks, the C.I. function must maintain an influential and effective role. Hear best practices for elevating the effectiveness and influence of the C.I. function.

- Ideal curriculum, training and core competencies
- Recruiting for and staffing the C.I. group — Leverage unique professional backgrounds for their C.I. potential
- Optimizing the structure of business intelligence to maximize strategic influence
- Delivering information to stimulate action
- Raising the profile of the C.I. unit throughout the organization
- Embedding C.I. value in the business process

Robin Kirkby, Director of Strategic Intelligence, **Altana Pharma**

10:30 Networking Break

11:00 Beyond Corporate Governance — Sarbanes-Oxley, C.I. Software and the "Real Time Disclosure of Material Events"

New financial reporting standards for publicly traded firms make it necessary to select C.I. software and portal infrastructure that will work in compliance with the firm's corporate governance rules. Only robust competitive intelligence applications can enable the required 48 hour time horizon for reporting. Explore how C.I. software is a critical component of corporate governance plans for public companies, as well as private companies that may be acquired by a publicly held firm in the future, or need to compete with public competitors today. You will learn:

- The implications of new regulatory mechanisms to C.I. groups and how to ensure compliance
- How the C.I. team became the Board's right-hand
- Which software tools can help enable compliance and how do they fit
- How to best structure the involvement C.I. should have with upper management
- Ensure C.I.'s seamless involvement in the broader legal and financial guidelines



Arik Johnson, Managing Director, **Aurora WDC**

11:45 Leveraging C.I. in the Direct to Consumer Business — A Lesson for Pharma

What can lessons and strategies can the pharmaceutical industry garner from a financial services firm? In this presentation, we discuss:

- Understand how C.I. and decision support works in a direct to consumer business — What are the possible applications for pharma?
- Leverage multiple information sources to provide a complete picture of the consumer relationship
- How C.I. works with other decision support systems to facilitate truly information-based decision support in multiple distribution channels

Melanie Wing, First Vice President and Senior Group Manager,  
Competitive Intelligence, **Bank One**; President of **SCIP**

12:00 Luncheon Hosted by:

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## DECISION-MAKING KEYNOTE ADDRESS

### 1:45 Create a System of Accountability for Decision-Making

Since decisions are built upon the insights, data and intelligence provided to the decision-makers, it is critical to measure the effect of these functions on end results. This keynote discussion probes the following critical questions:

- Is there a need for better decision-making in the industry?
  - \* a cursory look at the current state of the industry
- What is a good decision and how is it determined?
  - \* a good outcome is easy to measure; the same cannot be stated of a good decision
- What constitutes a good decision-making process?
  - \* the mix of opinions, logic, heuristics, data, analysis and, of course, politics
- How well are we trained in making decisions?
  - \* knowing what you need to know to make a decision
- Will the future state of the industry look anything like its past?
  - \* since the future can't be predicted, the best we can do is to project its possibilities
- What is required of today's decision-makers to increase the likelihood of tomorrow's successes?
  - \* transparent, logically consistent strategic thinking as well as believable, effective scenario planning



*Richard Bayney, Ph.D., Vice President, Decision Analysis & Portfolio Management, Johnson & Johnson*

*Dr. Bayney joined Johnson & Johnson's Pharmaceutical Research & Development (PRD) in 2002 as Vice President, Decision Analysis & Portfolio Management. Prior to his arrival at J&J PRD, he was Executive Director of Decision Analysis & Portfolio Management at Bristol-Myers Squibb, responsible for project and portfolio support to pre-clinical and clinical development. Before joining Bristol-Myers Squibb, he was the Head of Strategic Planning for the Biotechnology division of Bayer Corporation where he was responsible for decision analysis and portfolio management support for the Biotechnology portfolio. Dr. Bayney spent 10 years in Molecular Biology research at Merck & Company and Bayer Corporation/A.G., during which time he authored/co-authored more than 20 reviewed papers on hepatic drug detoxification and Alzheimer's Disease. He also spent two years on a foreign assignment as an international Project Manager in the area of cardiovascular diseases. He holds M.Sc. and Ph.D. degrees from London University and an M.B.A. from Columbia University.*

### 2:30 Building Organizational Decision Competency

In the high-stakes and increasingly competitive pharmaceutical industry, the winners will continue to differentiate themselves on their ability to bet on the right science and on their ability to make smart choices on how they market their products. As a consequence, it's not surprising that leaders are currently investing in their organization's competence in decision-making. Decision competency involves using a balanced set of processes, tools and organizational skills to make high quality decisions, doing so regularly on its most important choices, and working continuously to improve decision capabilities. While many companies achieve excellence on one competency dimension or in isolated areas, few have been able to achieve organizational congruence that results in performance far exceeding the sum of the parts. Learn:



#### CASE STUDY



*Carl Spetzler,  
Chairman,  
Strategic Decisions Group*



*Jerry Cacciotti,  
Managing Director,  
Life Sciences Practice,  
Strategic Decisions Group*

- The keys to achieving decision competence and organizational congruence
- The specific stages through which organizations desiring decision competence progress
- Case example — How one major pharmaceutical company has built decision competence and realized the benefits
- How to diagnose your own company's decision competence

### 3:15 Strategies to Interface Knowledge Between Support Functions

#### PANEL

At the top of most strategists "to-do" list you will likely find alignment or integration. Interfacing knowledge between decision-supporting functions maximizes the reach, recommendations and strategy of an organization. This panel discusses the challenges and the opportunities for firms to better interface knowledge between market research, forecasting and competitive intelligence.

*Moderator: Denise Myshko, Managing Editor, PharmaVOICE*

*Panelists: George Chressanthos, Ph.D., Director, Promotion Response Insight, AstraZeneca*

*Bill Friedrich, Director of Marketing Research, Wyeth*

*Neil Rogers, Director, Market Research and Business Analysis, Respiratory, AstraZeneca UK*

*Robin Kirkby, Director of Strategic Intelligence, Altana Pharma*

### 4:00 Close of Conference

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For more information, please visit <http://www.scip.org/>

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