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PREDICTIVE INTELLIGENCE

FOR PHARMACEUTICAL AND BIOTECH COMPANIES

Avoid Unanticipated Threats and Capitalize on Future Opportunity by
Generating Actionable Scenarios of Trends Ahead

JANUARY 24 - 25, 2005 • LOEWS HOTEL • PHILADELPHIA, PA

Conference Chairman:

Cliff Kalb, Vice President, Life Sciences,
Wood Mackenzie, Inc.; Former Senior Director,
Strategic Business Analysis, **Merck & Co., Inc.**

Keynote Speaker:

Jonathan Peck, Vice President,
The Institute for Alternative Futures (IAF)

Distinguished Faculty Includes:

Wayne A. Rosenkrans, Jr., Ph.D.,
Business Strategy Director, External Scientific
Affairs, **AstraZeneca Pharmaceuticals**

Kim Slocum, Director, Strategic Planning,
AstraZeneca Pharmaceuticals

Dean Slack, Director, Strategic Analysis,
Bayer Pharmaceuticals

Sharlene Zagozewski,
Director of Business Intelligence,
Boehringer-Ingelheim Pharmaceuticals

Alan Wills, Vice President, Strategy, Pricing and
Portfolio Evaluation, **Bristol-Myers Squibb**

Mark Phillips, Head of Network Strategy,
Global Manufacturing and Supply,
GlaxoSmithKline UK

Donald Bone, Ph.D., Corporate Director,
Science and Technology, Corporate Office of
Science and Technology, **Johnson & Johnson**

Ian Williams, Former Senior Director,
Strategic Management, **Pfizer Inc**

Andy Hines, Ideation Leader & Futurist, Ventures,
The Dow Chemical Company

Discover How to:

- Identify, track and assess non-obvious patterns throughout your business
- Distill trends and industry indicators into strategic scenarios of the future
- Leverage analytics to better shape products and brands
- Detect and mitigate risk through early warning processes
- Base your consumer growth strategy on predictive intelligence
- Understand the best way to affect change in your organization

In-Conference Industry Think Tank:

How Might Current Issues Shape the Future of Our Industry?

Take part in a structured and thoughtful panel discussion about future possibilities covering a range of pressing issues for the pharmaceutical industry, including:

- Revenue impacts of Medicare Reform
- Potential price controls and reimportation
- The future of ePrescribing and other Medicare-promoted technologies

PLUS!

Johnson & Johnson Case Study

*The Future of Medicine, the Oncology 2012 Project —
Translating the Vision of Tomorrow into the Action Plans of Today*

Choose from Two Pre-Conference Workshops — Monday, January 24, 2005

A **A PRIMER**
Scenario Planning —
Linking Insight
and Action

B **Build a Strategic Early**
Warning System — A Collaborative
Model for Sustainable Visibility
and Intelligence Alerting

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A PRIMER **A. Scenario Planning — Linking Insight and Action**

Scenarios afford an analysis framework that transforms projections about the future into a knowledge platform for strategic action.

The framework helps you address how the future will be different from the present, what various futures might be and how they might evolve in different ways. This tool allows analysis of industry change and evolution that extends considerably beyond what we presume to know about the industry today. Implications for action emerge as scenarios indicate potential opportunities (that may take your firm in unexpected strategic directions) as well as lurking threats (that could derail your current strategy or desired strategic alternatives). The scenario process details each step in the “how-to” of crafting a set of scenarios and assessing them for strategic, operational and organizational implications.

7:30 *Workshop Registration and Continental Breakfast*

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

I. Why Scenario Learning for Bio/Pharmaceutical Companies Gives a Competitive Edge

- Scenario learning —
What it is and what it is not
- Make decisions with greater potential for successful growth
- Understand how and why the future may change

II. Integrate Scenarios with Strategy and Corporate Decisions

- Master the basic approaches to constructing scenarios
- Avoid common errors and pitfalls
- Derive powerful insights from the scenario process

III. Apply Scenario Learning in Diverse Contexts

- Pharmaceutical industry-specific scenarios
- Competitive positioning
- Technology investments
- Anticipating new products

IV. Manage the Organizational Context for Scenario Learning

- Key do's and don'ts
- Avoid complication and facilitate the process
- Inform and manage conversations

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 Business Strategy Director of External Scientific Affairs at **AstraZeneca Pharmaceuticals** and in his current role Dr. Rosenkrans has responsibility for intelligence support for U.S. 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 U.S. 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 has presented at various forums on aspects of competitive intelligence, knowledge management as an intelligence tool, strategic intelligence, benchmarking and the use of information technology in support of strategy. 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.

Kim Slocum is the Director Strategic Planning 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 healthcare, Mr. Slocum has worked in a series of positions in sales, sales training, marketing, new product development, managed care marketing, disease management, healthcare consulting, strategic planning and externalization efforts for a variety of pharmaceutical, biotechnology and healthcare firms. Mr. Slocum's interest in strategic issues associated with healthcare 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 healthcare, 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 healthcare information technology, he works with AstraZeneca's exploratory team on the role of the internet in healthcare and currently serves in the additional role of Director, Strategy and Alliances for the company's U.S. 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.

**To Register Call Toll Free 800-817-8601
(781-939-2438 outside the U.S.) or Fax 781-939-2490.
Register on our website at www.cbnet.com**

B. Build a Strategic Early Warning System — A Collaborative Model for Sustainable Visibility and Intelligence Alerting

A chief pillar of every best-in-class competitive and market intelligence program is the Strategic Early Warning System, enabling a company to avoid or absorb the impact of strategic surprises, while capitalizing on fleeting opportunities before competitors even realize their potential. There are no crystal balls to predict the future, however by visualizing factors that could produce forward-looking scenarios, an early warning system provides timely visibility of unanticipated events in the external environment which are likely to have an impact on the firm's strategic ambitions, business interests or security of market status quo. Participate in this highly interactive and practical workshop, and learn how to elevate the effectiveness and status of your CI program through the implementation of a Strategic Early Warning System in your company.

7:30 *Workshop Registration and Continental Breakfast*

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

I. The Early Warning Process — What It Is and How It Impacts Your Firm's Bottom-Line

- Distinguish between and understand the respective value of market monitoring, tactical warning and strategic warning
- Introduce participants to the problem of 'strategic surprise', and its implications for companies
- Explain how the intelligence methodology can be used to build, or upgrade a company's early warning system

II. Analytical Approaches Used within the Context of a Strategic Early Warning System

- Use back-casting techniques to establish early warning indicators
- Determine the data sources necessary for strategic analysis and warning detection
- Generate timely insights from analysis and deliver them effectively

III. Elevate the Level of Decision-Making Influence

- Understand what an early warning system program means in practice to the CI professional and to his/her internal customers
- Suggest criteria for warning reports that add real value to the thinking of company decision-makers
- Market your services and your results

IV. Build the Early Warning System and Make Continuous Updates to Improve and Adapt Your System and Your Strategy

- Start small and focused but with key stakeholder support
- Gain organizational buy-in to the early warning program and maintain momentum and interest in the cause
- Monitor your own market, constantly adapting your approach to meet organizational needs and interests

12:00 *Close of Workshop*

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

— About Your Workshop Leaders —

Arik Johnson is Managing Director, CEO and Founder of **Aurora WDC**, Senior Fellow of Aurora's CI Best Practices Institute and Chief Strategist at the **ReconG2 Research and Analysis Bureau**, where he advises business leaders seeking a better understanding, degree of early warning and greater predictability about their competitive environment, market rivals and customer behavior. Before launching Aurora in 1995, Mr. Johnson was a business analyst and advisor with a leading international management-consulting firm. He writes a daily online journal critiquing business events called "Competitive Intelligence", edits and publishes "Recon CI News" twice each month for more than 15,000 subscribers worldwide, and is also a contributing editor or columnist to various periodicals on business competitiveness topics, including **KMWorld** and **SCIP's Competitive Intelligence Magazine**.

Jordan Frank is Vice President of Marketing and Business Development at **Traction Software**, the leader in Enterprise Weblog Software. The company was founded in 1996 and funded in 2000 by **In-Q-Tel**, the venture arm of the **Central Intelligence Agency**. Mr. Frank is primarily responsible for all outbound activities, overseeing the marketing, sales and partnership functions of the company. He belongs to **SCIP** and participates as a speaker at events ranging in topic from Homeland Security Tools & Technology and Government Intelligence Data Mining and Discovery to Credit Union Technology. While an integral part of a high-power collective intelligence network at Traction, he also implements the software at leading corporations and government agencies. While on assignment, he delivers consulting, technical and training services. Mr. Frank's previous positions at **Inktomi**, **Adero** and **Cambridge Computer Services** ranged from product management to business development, operations, sales and technology integration. Within each of these roles, Mr. Frank participated as a source and key user of competitive and market intelligence information to guide day to day decisions.

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Register on our website at www.cbnet.com**

*Do you know what business challenges
and opportunities will likely
arise 5, 10 even 15 years from now?
Your competitors probably do.
— Attend CBI's Predictive Intelligence
Conference and learn how to direct
today's strategy with the probability
of tomorrow.*

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MAIN CONFERENCE

Day One — Monday, January 24, 2004

12:00 *Main Conference Registration*

1:15 *Chairman's Welcome and Opening Remarks*
*Cliff Kalb, Vice President, Life Sciences, **Wood Mackenzie Inc;** Former Senior Director, Strategic Business Analysis, **Merck & Co., Inc.** Mr. Kalb has over thirty years of experience in the pharmaceutical industry. Most recently, he served as Senior Director, Strategic Business Analysis in Worldwide Human Health Marketing at **Merck & Co., Inc.** Previously, he held positions in sales, marketing research, health economics, public policy management, marketing management, licensing, business intelligence and business development at **Marion Labs, Pfizer Pharmaceuticals and Hoffmann La Roche.** He has served as Chairman of the Conference Board Council on Competitive Analysis. He is also President emeritus of the board of directors of the **Society of Competitive Intelligence Professionals (SCIP)**, as well as the **Pharmaceutical Business Intelligence and Research Group (PBRIG).** Mr. Kalb holds a BA from Rutgers University and an MBA from Fairleigh Dickinson University.*

OPENING KEYNOTE ADDRESS

1:30 **Predictive Intelligence —
What Is It and What Are the Applications
to the Pharmaceutical Industry?**

Predictive intelligence is seeing situations in advance to thrive in a changing environment and it is based on two forms of knowledge. Inner knowledge is what resides inside organizations, cultures and thought leaders, and it is vital for understanding the pharmaceutical industry's potential in healthcare. Outward facing knowledge is what recognizes the key changes in science, healthcare, business and politics that will help the pharmaceutical industry reach its potential. This address explores both forms of knowledge, highlighting the power of predictive intelligence for pharmaceutical companies, and helps the industry take more responsibility for global health through:

- Foresight that identifies tipping points and strategic opportunities in the long-term, mid-term and near-term
- Bold goals that organize effective collaborations, leverage corporate resources and compel disciplined action
- A vision of corporate social responsibility that can unite the hearts and minds of citizens, patients and healers

Jonathan Peck, Vice President,
The Institute for Alternative Futures (IAF)

Trained as a political scientist and futurist, Mr. Peck provides a wide range of consulting, speaking and facilitation. His work fosters visionary leadership, scenario-based strategic planning and creative learning opportunities for a diverse clientele. He is a certified practitioner of the Myers-Briggs Type Indicator (MBTI), and has integrated psychological concepts from the field of organizational development into futures studies. He regularly consults with boards of directors and senior executives, for clients that include Fortune 500 companies, professional associations and government agencies. Mr. Peck designs and directs futures programs in the international pharmaceutical industry that provide vision, scenarios and environmental scans for what lies ahead. He serves as a consultant to pharmaceutical companies and to organizations important to the pharmaceutical industry — from the FDA to medical societies, from pharmacists to patient groups. His knowledge of the industry has also led him to create training programs for pharmaceutical executives in sales, managed care, human resources, regulatory and public affairs. His proprietary

scenarios describe the changes in reimbursement, regulations and the scientific underpinning of global pharmaceutical markets. His public projects have looked over the edge of current scientific and regulatory horizons and pointed to an exciting future for pharmaceutical innovation.

2:15 **With All This Intelligence, Why Don't We Have Better Strategies?**

Making better strategy predictions and decisions isn't about getting intelligence a day faster or with another decimal point of precision. It's not about newer, better, faster, cheaper sources. It's not about finding magic words that win the hearts and minds in the executive suite. In short, it's often not about the intelligence at all. It's about people, and how people use (or don't use) intelligence to make good predictions and good decisions. Using intelligence well is rarely about more-voluminous data or more-precise analysis. Rather, it is more often about how you use what you've already got, and in thinking differently and better than your competitors. Given all of the management expertise available, you'd think that predictions and strategies would never fail. Yet, they do. This session is about applying intelligence in compelling, interactive, connected-to-the-bottom-line and proven techniques. In this highly interactive session, learn how you can put your intelligence to work to create dramatic improvements in business performance.

- How well-intentioned, conventional techniques lead to decisions that fail
- How simulation and war gaming use your intelligence to explore your strategies against those 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 businesses when managers applied these principles

Mark Chussil, Founder and CEO,

Advanced Competitive Strategies, Inc.

3:00 **Advanced Statistical Analytics and Forecasts for Future Projections and Pattern Assessment**

Statistical analyses and sophisticated forecasts enable you to discern beyond broad trends to see the all variables influencing patterns. By using an artificial intelligence system, companies can connect the dots and fill the gaps of massive data collected daily throughout the company. Benefits of learning applications of advanced statistical analytics include:

- Identify, track and assess non-obvious patterns throughout your business
- Detect and mitigate risk
- Leverage analytics to better shape products and brands
- Streamline processes

Dean Slack, Director of Strategic Analysis, Bayer Pharmaceuticals

3:45 *Networking and Refreshment Break*

4:15 **The Future of Medicine, the Oncology 2012 Project — Translating the Vision of Tomorrow into the Action Plans of Today**

Hear how the Corporate Office of Science and Technology at Johnson and Johnson engaged in a powerful scenario futures, designed to predict what the medical practice of oncology would be in 2012, covering prevention,

detection and treatment. This case study, led by the leader of the Oncology 2012 project, presents the methods used in developing future predictions, as well as the challenges encountered when attempting to redirect the strategy of a substantial, decentralized organization. Learn how they:

- Collaborated with an expert futures consultant group to plan and execute the project and to ensure that the vision of Oncology 2012 would be based on the best and broadest input
- Enlisted the ideas and perspectives of various internal and external stakeholders through interviews
- Worked to translate vision of tomorrow into the mechanisms and actions of today

Donald Bone, Ph.D., Corporate Director, Science and Technology, Corporate Office of Science and Technology, Johnson & Johnson

5:00 **The Tools and the Approach for Hunting for New Business Platforms**

This presentation is a case example of a recent exercise performed to identify new "hunting grounds" for new business platforms. Discover how the data from these activities were brought together into a "smashing" session and combined into potential new business platforms to be scoped out as the organization moves forward.

- Review the overall process used
- Hear highlights of the specific tools and techniques
- Learn how this approach generated potential new business platforms for the future

Andy Hines, Ideation Leader & Futurist, Ventures,

The Dow Chemical Company

5:45 *Close of Day One*

	5:45-6:45 Wine & Cheese Networking Reception Join colleagues and friends in a relaxed setting.
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Day Two — Tuesday, January 25, 2005

7:45 *Continental Breakfast*

8:15 *Chairman's Review of Day One*

Cliff Kalb, Vice President, Life Sciences, Wood Mackenzie Inc; Former Senior Director, Strategic Business Analysis, Merck & Co., Inc.

8:30 **Link Scenarios, Strategy and Market Monitoring**

Organizations should change the way they monitor the market at the same time they change the strategy. Few do. Market monitoring often continues in parallel with implementation planning and execution, with only a loose connection between them. Integrating monitoring deeper and more directly into your organizations can pay huge dividends in terms of organizational agility, alignment and decision-making. This session illustrates how to:

- Connect scenario development with market monitoring
- Use monitoring to gain alignment without developing "blind spots"
- Leverage insight to enrich strategy-making and move you from a "Big Bang" to continuous process of strategic thinking
- A case study illustrating how this process has led to the development of a web-based tool to monitor the ever-changing face of Medicare reform

Christopher Serjak, Principal, Wood Mackenzie, Inc.



9:15 **Separating Signals from Noise — Effective Monitoring of the Competitive Landscape**

The abundance of competitive information available from published and human sources is overwhelming. While environmental scanning has been a technique long employed by pharmaceutical companies, few can point to success at being able to consistently anticipate competitive developments and respond accordingly. This presentation offers guidance and instruction on how to identify and evaluate indicators of competitor and market behavior that are meaningful. You learn how to:

- Choose the right set of indicators to monitor based on an assessment of future industry and competitive conditions that could have a major impact on your organization
- Assess the diagnostic worth of indicators
- Employ a set of forward-looking analytic techniques that can assess the likelihood of future competitor activity

Plus, hear a case study of a pharmaceutical company that successfully monitored diagnostic indicators and used them to anticipate competitor behavior.

Ken Sawka, Principal, Outward Insights LLC

10:00 **Build the Capability to Assess Implications of Industry Drivers and Trends**

Trends, signals and industry developments need to be understood and considered as potential forces or key drivers that impact future scenarios — This enables you to develop multiple scenarios, spanning a plausible range of outcomes. These processes can be applied across the business. Understand how to make these processes and scenarios valuable and how they may be used to develop robust business strategies.

- Create a roadmap of trends and consider how they can assess and articulate future uncertainties
- Understand the interaction and relationship between trends and plausible futures
- Determine “wildcards” and evaluate how should they be integrated into the mix
- Keep the process organic —
Revisit and revise scenarios
- Consider the process in the context of:
 - * manufacturing and supply chain
 - * factory investments
 - * distribution

Mark Phillips, Head of Network Strategy, Global Manufacturing and Supply, GlaxoSmithKline UK

10:45 *Networking and Refreshment Break*

11:15 **Gain Competitive Advantage with Sophisticated Analytical Assessments**

The future of your company lies in the hands of today’s decisions. What can you do to maximize the chance of success of these critical decisions? How can you ethically tap into significant intelligence and make sense of telling signals in order to maximize the market advantage of your company? Analytics assessments, if applied sophisticatedly, can produce advanced insights and counsel to your internal clients. Learn to:

- Investigate the strategic intent of competitors and individuals to give you a distinct market advantage
- Predict market segmentations
- Discern the future impact of a competitors future actions

- Determine the best strategy of response
- Understand the strategy and results of “red team attacks”

William DeGenaro, President, DeGenaro and Associates, Inc.; Former Director of Business Research and Analysis (Intelligence), 3M Company

12:00 *Luncheon*

1:15 **Industry Predictions — How Current Issues Might Shape the Industry’s Future**

This panel discussion stimulates structured and thoughtful speculation about future possibilities covering a range of pressing issues for the Pharmaceutical industry. Have an opportunity to take part in a conference-wide, think-tank discussion where the possibilities of various futures are explored and rationalized.

- Revenue impacts of Medicare Reform
- Potential of price controls and reimportation
- The future of ePrescribing and other Medicare-promoted technologies
- Pharmacoeconomics and disease management programs
- Pharmaceuticals and the age of consumerism

Moderator: Cliff Kalb, Vice President, Life Sciences, Wood Mackenzie, Inc.;

Think-Tank Leaders:

Mark Phillips, Head of Network Strategy, Global Manufacturing and Supply, GlaxoSmithKline UK
Sharlene Zagozewski, Director of Business Intelligence, Boehringer-Ingelheim Pharmaceuticals
Alan Wills, Vice President, Strategy, Pricing and Portfolio Evaluation, Bristol-Myers Squibb

2:15 **The Leadership Challenge — Once You See the Future Clearly, How Do You Lead Through Change?**

Link your vision of the future to execution by identifying the people who need to be influenced, the mechanisms to make them change and the specific actions they need to take in order to prepare your organization for the future.

- Understand the best way to effect change in your organization
- Create the intellectual and emotional energy to enact these changes
- Understand the responsibility of leaders in bringing about evolutionary change and why so many leaders fail in this arena

Ian Williams, Former Senior Director, Strategic Management, Pfizer Inc

3:00 *Close of Conference*



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Topics include:

- Detect and Prevent Future Threats to Your Business
- Scan and Monitor the Industry to Identify New, Profitable Business Platforms
- Turn Future Scenarios About the Pharmaceutical Industry into Action Plans for Today

Speakers Include:

Wayne A. Rosenkrans, Jr., Ph.D., Business Strategy Director, External Scientific Affairs, **AstraZeneca Pharmaceuticals**

Alan Wills, Vice President, Strategy, Pricing and Portfolio Evaluation, **Bristol-Myers Squibb**

Mark Phillips, Head of Network Strategy, Global Manufacturing and Supply, **GlaxoSmithKline UK**

Jonathan Peck, Vice President, **The Institute for Alternative Futures (IAF)**

Donald Bone, Ph.D. Corporate Director, Science and Technology, Corporate Office of Science and Technology, **Johnson & Johnson**

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