

Pharma **VOICE**

THE FORUM FOR THE INDUSTRY EXECUTIVE

YEAR IN PREVIEW

2009

CORPORATE STRATEGIES

Globalization

R&D

New Development Models

SALESFORCES

Skills for the Future

MARKETING

Media Revolution

COMMUNICATIONS

Patient Education

Contents

36



Novartis'
Dr. Daniel
Vasella

SPECIAL ISSUE Year in Preview

10 AN INDUSTRY OVERVIEW

Life-sciences companies will have to transform themselves into more nimble, forward-thinking entities.

14 AT A GLANCE

Industry experts provide highlights of the trends covered in this issue.

18 CRYSTAL BALL

Industry experts identify the top trends they expect to shape the industry.

36 THE CORNER OFFICE

Comments from CEOs and Presidents of leading life-sciences companies reveal strategies and top trends for the coming year.



Gene Guselli
InfoMedics

18

42 GLOBALIZATION

Emerging markets provide opportunities for pharmaceutical companies as well as their partners.

50 COUNTERFEIT DRUGS

The counterfeit medicines market is a real, clear, and present danger to public health.

58 EARLY RESEARCH

Discovery and research technologies will have a tremendous impact on the pipelines of the future.

64 DEVELOPMENT

Successful biopharmaceutical companies will be those that review R&D business models and implement updated strategies.

72 PERSONALIZED MEDICINE

Obstacles and challenges still remain to make the vision of personalized medicine a reality.

76 PATIENT RECRUITMENT

Larger, more complex trials have made the enrollment of patients even more challenging.

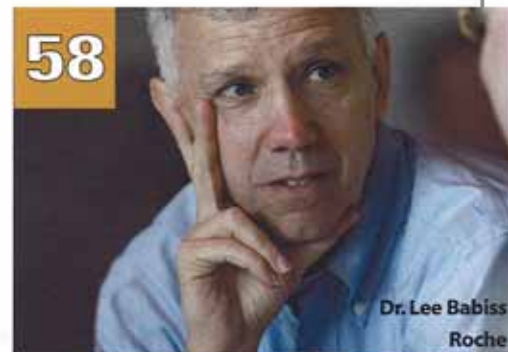
82 SALESFORCES

The industry will employ innovative ways to do more with less and add a value proposition to sales strategies.

90 MARKETING

Pharma begins the move from informing to interacting amid the Web 2.0 revolution.

58



Dr. Lee Babiss
Roche

98 PATIENT EDUCATION

Product managers still need to reach patients with messages that resonate on a personal level.

102 DOCTORS' CHOICE AWARDS

A review of the 2008 winners.

IN EVERY ISSUE

3 Letter from the Editor

6 UpFront

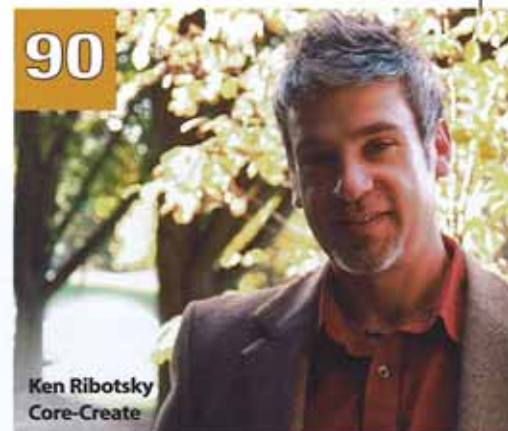
104 What's New

108 E-Media

113 On The Calendar

116 Talent Pool

90



Ken Ribotsky
Core-Crete

▶ The CRYSTAL BALL

We asked our readers to act as prognosticators and identify the top trends that they expect to shape the industry in the coming year and beyond. **SOME OF THEIR RESPONSES MAY ALREADY BE PART OF YOUR STRATEGIC VISION, WHILE OTHERS MAY ADD A WRINKLE TO YOUR PLANS.** Whether you agree or not with the following predictions, 2009 is sure to shape up to be a tumultuous 12 months punctuated by cost reductions, belt-tightening, and an overall mandate to do more with less.

(Editor's Note: Predictions are presented in alphabetical order by contributor's last name.)

FUNCTIONAL OUTSOURCING

Glenn Bilawsky
CEO

i3

Pharmaceutical manufacturers will increasingly turn to CRO partners to manage complete functions, helping to cut costs and increase efficiencies.

Integrated, seamless technologies on the horizon will revolutionize clinical trial management by accelerating the study process to complete trials quickly and efficiently.

The emphasis on postmarketing research and safety surveillance will expand, and pharmaceutical manufacturers will leverage this research to optimize their competitive advantage and maximize ROI.

i3, a global Ingenix company, Basking Ridge, N.J., provides integrated scientific strategies and solutions throughout the pharmaceutical product life cycle. For more information, visit i3global.com.



PAYERS TAKE MAJOR ROLE

Diana Conmy
Corporate Director, Market Insights
IMS Health

Shifting stakeholder influence increases the importance of payers and patients.

The economy is now impacting the market unlike past downturns.

Higher-growth segments are tied to innovation and primarily in specialist driven and biotech areas.

IMS Health, Norwalk, Conn., reveals insights using comprehensive market intelligence. For more information, visit imshealth.com.

A CHANGING SALESFORCE LANDSCAPE

Evan Demestihias, M.D., R.Ph.
CEO

The Medical Affairs Company

Demand for healthcare products is rising dramatically because of aging



baby boomers, who also take a very active role in their healthcare. While more pressing financial sector reforms take the front seat for the next several years, substantive healthcare reform is clearly on deck and may face a Congress and administration with a mandate to enact significant changes to our healthcare system.

Big pharma companies will continue to modify their salesforce

model to improve on both the quality and length of interactions between reps and physicians. Physicians want to interact with more highly trained reps focused on clinical data and evidence-based medicine. While significant reductions in traditional sales reps are well under way, several big pharma companies, to better serve the needs of their physician customers, are pioneering expansion of clinical specialist positions. This could be the salesforce of the future.

The impact of electronic technology on medicine will become more dramatic. As many as 99% of physicians are online and more than 80% say the Web is essential to the way they practice medicine. Instantaneous access to medical information through technology is the norm. Almost half of all physicians are already participating in e-detailing, most of whom consider it equal or superior to face-to-face promotion. E-communications may become the best and possibly the only way to reach the majority of physicians.

The Medical Affairs Company, Kennesaw, Ga., provides pharmaceutical, biotech, and medical-device industries a complete array of strategic and tactical medical affairs solutions, including: contract and consultative MSL programs, MSL knowledge management solutions, and medical communications services. For more information, visit themedicalaffairscompany.com.

SEA CHANGE

Glen de Vries
President

Medidata Solutions Worldwide

Clinical development is evolving from a "black box" management model relating productivity to operating expenses to one where transparency and efficiency will be critical success factors for both large and small com-



ed, consistent, and cohesive brand campaigns. Forward-thinking companies will name chief marketing officers toward this end.

Specialization. With virtually all primary care-oriented therapeutic categories now satisfied, in most cases with generic alternatives, all marketers' attention will be shifted to niche markets and specialty therapeutics — and the audi-

ences, channels, and chatter critical to their success.

Chaos vs. control. As Web 2.0 turns to 3.0, marketers will realize that they're no longer in control of their brands' messaging destiny, and they will be challenged by heightened regulatory, legal, and economic forces. Continuous scenario planning, real-time analytics, and marketing agility will become the new brand survival skills.

CommonHealth, Parsippany, N.J., is a network of highly specialized healthcare marketing companies, all aligned to build brands that dominate in a complex and crowded marketplace. For more information, visit commonhealth.com.



BEHIND THE COUNTER

George Glatz
President and Chief Branding Officer

Vox Medica

Physicians face increased time constraints, yet the volume of patients with chronic diseases is on the rise, therefore a growing number of products will transition to "behind the counter" — that is, they will be

increasingly available through pharmacists or PAs and/or NPs to streamline the patient prescription management and compliance process.

Mom — acting on behalf of many generations — will become an incredibly powerful primary-care expert in this self-directed and interactive healthcare era. And since Mom won't settle when it comes to caring for loved ones, she will demand more engaging patient- and caregiver-friendly educational resources at her fingertips.

Healthcare industry executives will look to complement their skills with nonindustry brand management and leadership expertise that pushes them to become better at brand vs. product marketing, while outsourcing more traditional aspects of sales, marketing, and R&D to keep costs down.

Vox Medica, Philadelphia, delivers inventive, cost-effective communication solutions to healthcare clients worldwide. For more information, visit voxmedica.com.

PERSONALIZED MEDICINE

Glenn Gormley, M.D., Ph.D.
President and CEO

Gemin X Pharmaceuticals

Personalized medicine will become more important as we learn about how individuals differ in their susceptibility to disease, their clinical presentation of disease, and their response to intervention. Therapeutic interventions will be tailored to these differences rather than to the characteristics of populations.

Collaborative initiatives for process improvement in the clinical-research enterprise will take advantage of a diverse and broad knowl-



edge base across both public and private sectors, enhancing public confidence in the clinical-research enterprise. These efforts will lead to increased transparency of clinical-trial results and the implementation of more effective approaches to monitor and interpret safety data.

Efficiencies in DNA sequencing will lower the time and cost to a degree that will make it possible for anyone to have their own genome analyzed and available to guide personal and medical decisions.

Gemin X Pharmaceuticals, Malvern, Pa., discovers and develops advanced oncology therapeutics based on novel mechanisms of action. For more information, visit geminx.com.



PERSONALIZED PRESCRIBING

Gene Guselli
Cofounder, President, and CEO

InfoMedics Inc.

The long-term future for healthcare looks bright as personalized medicine holds the promise of delivering the right treatment for each individual patient. But "personalized prescribing" should be deployed today as it offers significant improvement over current "trial and error prescribing." Proactive and targeted application of tools, which facilitate

better patient-physician communications will enable "personalized prescribing" by bringing new information to doctors at the point of care. This new approach will not only break long-established practice patterns but also improve the likelihood of the right medication being prescribed for each patient the first time.

The industry has always spent far more money on patient acquisition than on patient retention. Even though recent initiatives are more retention focused, I would contend that retention should be the focus of an acquisition program from the outset. The industry must invest in strategies that foster a personalized dialogue between physicians and patients, starting with condition awareness and diagnosis, through prescribing and continuing throughout the treatment regimen. Retention challenges are specific to patients and to physicians (not one size fits all) and they evolve continuously. If we get it right, we will provide physicians with the knowledge to select the right patients for a particular medication, achieve better treatment responses and adherence, and best of all, build brand loyalty.

InfoMedics Inc., Reading, Mass., helps pharmaceutical companies and managed care organizations improve the quality of communications between patients and their physicians. For more information, visit infomedics.com.



NICHE VERSUS BLOCKBUSTER

Terry Hisey
Vice Chairman and U.S. Industry Leader, Life Sciences

Deloitte LLP

We expect 2009 to be a guardedly positive year for the life-sciences sector. The sector will focus on transforming itself to evolve where it needs to be for the future by increasingly moving to more efficient cost structures as companies work to align them-