

Healthcare Vision 2020

Nearly 100 women leaders provide their insights on the trends that will shape the industry in the next few years.

PharmaVOICE has exclusive access to nearly 100 women leaders, who are providing their take on the trends that are expected to shape the healthcare industry in the next four years. Identified by their companies as HBA Rising Stars and Luminaries, these industry executives talk about everything from patient-centricity to bridging the gender gap. (For information about the Healthcare Businesswomen's Association [HBA] and its awards, visit hbanet.org.)

Patient-centricity and personalized health are expected to be the dominant trends in the next few years as are pricing, technology, and value. And, as one might expect from this distinguished group, the influence women will have as leaders and caregivers.

Patient-Centricity

The U.S. healthcare system is the most costly in the world, accounting for 17% of the gross domestic product with estimates that this percentage will increase to 20% by 2020, according to the National Healthcare Expenditure Projections, 2010-2020. At the same time, countries with health systems that outperform the United States are also under pressure to derive greater value for the resources devoted to their healthcare systems. Aging populations and increased

longevity, coupled with chronic health problems, have become a global challenge, putting new demands on medical and social services. To address these myriad factors, the Institute for Healthcare Improvement has developed a framework called the Triple Aim, in which the institute is simultaneously pursuing three dimensions: improving the patient experience of care (including quality and satisfaction); improving the health of populations; and reducing the per capita cost of healthcare.

"The business of healthcare in 2020 will continue to evolve in achieving the Triple Aim," says Sherrise Yvonne Trotz, senior director, enterprise immunizations, Walgreens Boots Alliance. "Payers are searching for tools to stunt the growth of the healthcare sector that has resisted cost-containment for decades. For companies to thrive in 2020 in a world of shifting profit pools, they must devise a business model that focuses on outputs in keeping with the Triple Aim rather than simply generating more inputs — more procedures, more products, and ultimately more cost to the payers."

Kelly Cullen, VP, account group supervisor, at Create NYC adds that in terms of an aging population more services will be required and the key challenge will be to deliver those services in the most cost-efficient way to offset the increased demand and cost of delivery.

"For the consumer this means a larger portion of the cost of care is going to progressively be shifted to them as a way of controlling cost and managing demand," she says. "Consumers will be faced with

a higher overall burden for the cost of their own care with incentives to use low-cost therapeutics — generics when available — and formulary restrictions and alternatives to be used first — step edits for example for higher cost therapies like biologics — to control costs."

Suzanne Maahs, Pharm.D., associate director in clinical sciences and innovation, translational medicine, at Novartis Pharmaceuticals, says as the shift toward the patient as a customer continues this will translate into more tangible results.

"2020 healthcare will be patient-focused healthcare," she says. "This is quite different from the sometimes HCP-specific approach now. Rather than put so much weight on ob-



I set a positive example that I hope junior women will emulate for what I deem necessary for professional success: respect, accountability, dedication, and professionalism.

ELIZABETH CICCIO
Skipta

As the business environment and customer behavior change, customer-centric insight and personalization marketing will be key in the business model of the future.

LILY ZHU
Pfizer





Digital communication and health management tools will continue to rise, yet there will be an improved convergence of human interaction with these digital health behaviors.

CATHERINE GOSS

Ogilvy CommonHealth

jective results, such as tests, which are deemed clinically significant, we will start to value the subjective patient experience more.”

Mary Christian, head, oncology academic research group, at Bristol-Myers Squibb, says even though her organization has made tremendous progress toward becoming a customer-centric organization, there is still work to do.

“In 2020, the business of healthcare will look nothing like we have seen before, she says. “I believe that healthcare business will continue to evolve to be more patient- and customer-focused in every sense of the term. Successful healthcare companies will invest resources in truly understanding their customers, their needs, and their expectations. The businesses that will win in 2020 will leverage transformational medicines and science, along with a superior customer experience, to deliver powerful, value-based solutions, which will revolutionize healthcare.”

Michele Schimmel, managing director at Rx Mosaic Health, who is passionate about public health education, as a communicator, brand-builder and healthcare consumer, looks to the continued advancements being seen in the development and availability of innovative treatments and preventative medicine.

As part of the movement toward patient-centricity there is an increased focus on patient-centered education and communications, both of which many of our experts say are critical to improving outcomes.

Amy Van Buren, VP, implementation, Magellan Rx Management, agrees that one important trend is the continuing development of the patient as an educated consumer.

“We make the time to self-educate and

2016 HBA Rising Stars



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Director of Digital
JUICE Pharma Worldwide



SUSAN ASANTE-ABEDI

Senior Principal
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NYRA BANNIS

Director of Patient Services
Shire



CHIARA BERGERONE

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Director, Forecasting
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ELIZABETH CICCIO

VP, Marketing
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KELLY CULLEN

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PAULA DANTAS

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For an aging population, more services will be required and the key challenge will be to deliver those services in the most cost-efficient way to offset the increased demand and cost of delivery.

KELLY CULLEN
Create NYC

vote with our dollars on personal products and services for our bodies and minds but not always when it comes to medical and mental health treatments," she adds. "As we continue to become better informed about genetic profiles, disease prevention, treatment options, and costs, we will be in a better position as consumers to partner with our HCPs for quality and cost-effective healthcare."

Communications will be the key of healthcare business in 2020, says Pauline Ng, VP, group account supervisor, Phase Five Communications, a division of ghg.

"It is crucial that we try our best to deliver medically and scientifically correct information in the healthcare industry," she says.

Today, as more people are taking an active role in managing their health not only are they more enthusiastically tracking their exercise and knowing more about what they put into their bodies, they are more educated about their healthcare options, says Vildan Kehr, divisional VP, global talent acquisition, Abbott.

"Science and communication have reached new heights with hyper-targeted treatments and engagement efforts," says Lauren Michelle Nook, VP, management supervisor, McCann Echo. "As decisions made by patients, providers, payers, and pharma become more precise and data driven, competition will increase and

meaningful differentiation through products and services will define value.”

Lili Zhu, senior director, global commercial operation, China lead, Pfizer, adds that as the business environment and customer behavior change, customer-centric insight and personalized marketing will be key in the business model of the future, and digital marketing will be the key customer engagement approach.

Debra Harris, senior director, marketing solutions, at Healthcasts, says as physicians are trying to balance the latest, often game-changing, advances in medicine with patient and practice demands, the business of healthcare will need to evolve toward platforms that allow marketers to provide rich and timely content that explains the science underpinning these new treatments — in this context, physicians will actively choose to engage.

“Delivering messages driven by end-user needs will promote physician desire to pull in that information,” she says.

Christine Dellanno, U.S. regulatory healthcare manager, RB, predicts that healthcare business in 2020 will serve the needs of customers like no other year before.

“At the touch of a finger, we will have the ability to obtain the care and medicines we need for common illnesses,” she says. “There will be medical devices that we can download as an app and that will assist with diagnosis and treatment.”

This movement toward holistic wellness and preventive care, or as Quyen Yuen, team leader, at Allidura Consumer, inVentiv Health, calls it from sick care to well care, will only continue.

“The belief that balanced living and moderation are keys to both health and happiness will be realized,” she says. “It’s impossible to expect the average person to live completely without some temptation. I do expect the notion of healthier living to become normalized.”

Technology Drivers

One of the factors driving the trends of patient-centricity and personalized health, whether in the clinical setting or in the communications suite, is technology.

“The healthcare marketplace is very dynamic and will follow in the patterns that our personal lives are moving toward,” says Cheryl Fielding, executive VP, director of client services, at Palio, inVentiv Health. “There will be a lot more focus on technology and its assistance in the efficient provision of quality care. Technology will be used to access care on-demand, with fewer in-person interactions and how ongoing care and outcomes are monitored.”

“Patients will be even more empowered to make decisions supporting their own healthcare,” says Jody Russell, talent partner at UCB. “There will be more transparency needed by patients with more visibility on the flow of the healthcare dollar. This will lead to value being defined on an individual level. Innovation and technology will continue to advance as the healthcare systems take a step closer to personalized medicine.”

Cherene Powell, managing director at Accenture Strategy, says the healthcare industry is at a tipping point, noting that the healthcare landscape in 2020, while only four years away, will look dramatically different, including a more research and digitally savvy customer base that will demand more end-to-end services.

“The silos within the industry — medical device and drug manufacturers, healthcare providers, and insurance providers — will be more closely integrated with the customer at the center of the experience,” she says. “Technology will dramatically change how we diagnose and treat illness, prevention will be a greater focus, diagnosis will be much earlier, and treatment will be more precise to the individual. It’s an exciting time to be part of the industry.”

Julie Schiffman, VP portfolio and decision analysis, Pfizer, agrees that 2020 will be an exciting time in healthcare and the patient journey will look very different than it does today.

“Patients will be even more engaged and empowered with the tools available to them,” she says. “Disruptive technologies and big data will allow patients, payers, and providers to access information and drive the healthcare environment in ways they never have before. At the same time, we could be moving into a scientific renaissance that may revolutionize treatment options that are available for patients. Most importantly, there will be an opportunity for greater cooperation across all the channels of the healthcare ecosystem, including new nontraditional partners, which will hopefully lead to better outcomes for patients around the world.”

As consumers become more informed, Catherine Goss, senior VP, managing director, at Ogilvy CommonHealth, says they will also become more demanding when it comes to their health and healthcare options.

“As part of this, the growing trend of virtual care will be more prevalent,” she says. “Digital communication and health management tools will continue to rise, yet there will be an improved convergence of human interaction with these digital health behaviors.”

Healthcare will be more at patients’ fingertips than ever before and the advent of digital healthcare tracking devices for all will give patient and healthcare professionals more in-



2020 will be a time of strong competition, requiring innovation and collaboration to assure success in this environment.

DR. EBELE OLA
Johnson & Johnson



There will be a focus on quality and outcomes but with greater teeth in the game exposing risk on all sides of what is quickly becoming more of an octagon model.

DEENA WARD
Novo Nordisk

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formation than can possibly be sorted through, says Kirsten Hansen Tonnesen, VP, management supervisor, McCann Healthcare.

“For instance, my phone now knows how many steps I take and how many stairs I climb — or don’t climb,” she says. “It will be increasingly important to filter all these inputs into something useful for patients and physicians to act on. In this way, we can look to have technology support a way to drive the prevention of major avoidable diseases and track others that can be managed. It will take more than a few years to have a complete system where patients and physicians have a seamless information loop, but the beginnings of this information exchange are happening now.”

In terms of digitization, Sara Allen, director of digital at Juice Pharma Worldwide, says the industry is likely to increasingly turn to mobile platforms and artificial intelligence (AI) to improve patient access to high-quality support, revolutionizing healthcare in multitudes of ways.

“With more access than ever before, patients will be drivers of their own care and of change in the health industry,” she adds.

Technology has and will continue to revolutionized healthcare and play a huge role in the future.

“By 2020, healthcare business models will focus heavily on the convergence of technology and medical treatments to manage diseases and improve patient outcomes,” says Eliza Oristano, assistant VP, Makovsky. “Marketers and brands will need to expand patient touchpoints beyond traditional and digital communications.”

Emery Rogers, account director, TBWA\WorldHealth, concurs, noting that in 2020, healthcare and technology will be more closely tied than ever before, creating a more empowered, engaged, and educated population.

“This ubiquitous marriage will change the definition of healthcare; instead of caring for the ill, the focus will be on prevention and promoting being well,” she says. “By 2020, more treatments will be more accessible to more people in more places thanks to tools such as 3D printing, mobile apps, and drones. In addition to more and more healthcare occurring outside of the traditional doctor’s office, therapies will become more targeted, less invasive, and more tailored for the individual, allowing for the overall healthcare experience to be one that is better for all.”

Additional experts, such as Tara Sullivan, senior VP, client service director, CDM NY, agree that advancements in technology and digital innovations will challenge those in the business of healthcare to demonstrate value and clinical relevance differently — and they

will completely change how consumers manage their own health.

“In 2020, we will also have a more informed, healthy aging population but also lifestyle diseases reaching epidemic proportions,” Ms. Sullivan says. “The treatments we develop in response to these changes, as well as the conversations we cultivate with our patients and

healthcare professionals, will be very different. There couldn't be a more exciting time to be in the business of healthcare — and the future couldn't be brighter.”

“It will be interesting to see what healthcare will look like in 2020, with continued technology developments, a focus on personalized medicine, an aging baby boomer pop-

ulation bookended by the diverse millennial generation shaped by technology,” says Ruth Trzeciński, senior manager, compliance, in-Ventiv Health. “With potential regulatory or policy changes in the United States, healthcare likely will have a different face in 2020 than it does today. My hope is that the human interactive quality of



In 2020, healthcare will be...

Connected, value-driven, and technology-enabled. — **SUSAN ASANTE-ABEDI, IMS Consulting Group**

More consumer-driven, more digitally enabled, more integrated, but still costly. — **SANDY BABEY, BD**

Enabled by the use of home self-administered therapies, which will become more and more common and the future of drug primary packaging will move to process analytical technology (PAT), which will replace more and more the normal batch-to-batch production. — **IRIS BAVAJ, West Pharmaceutical Services**

Influenced by each country's health authorities reviewing the HTA (Healthcare Technology Assessment) for new medications to be paid for or reimbursed; the HTA is extensive, and aims to prove that the new medication is not only useful, but the cost is justified over less expensive alternatives. — **JOAN CANNON, Lundbeck**

Increasingly targeted in terms of therapeutic approaches with communication strategies. — **FRANCINE CARRICK, PH.D., GSW, inVentiv Health**

Customer-based, rather than product-based by 2020; patients want more information and want to feel empowered to make better, healthy decisions. — **PAULA DANTAS, EY**

More patient-focused, improved health outcomes as a result of data and technology advances, and continued efforts to address healthcare accessibility and cost in the U.S. — **NANCY SHORE DILELLA, Genentech**

Fused; the connectivity we are advancing today will be fully fused into a new business models that thrive on customer experience at the core. — **LYN FALCONIO, Publicis Health**

More connected and hopefully we will see patients taking on more responsibility for

making healthcare purchasing decisions. — **HEATHER GERVAIS, athenahealth**

Focused on leveraging technology to speed drug development, however, the patients will still be at the core of drug development. — **KASEY QUINN GRIFFIN, Quintiles**

Far more visibly diverse, with more efficient business models that have benefited from said diversity. — **SAMINA KANWAR, PH.D., Merck**

More patient-centric, connected/digital, and affordable, with better quality and healthy living aging programs. — **IRINA KUSNEZOW, EY**

A much more collaborative relationship where the patient is collaborating with providers to be an active consumer of healthcare. Specifically, choices about whether treatment should be pursued or not depending on personal circumstances. — **LISA MICARELLI, McCann Managed Markets**

Completely transformed by the business of investigator payments, as the process becomes invested in and automated. My hope is that we stop talking about the issues of late and inaccurate payments by 2020. — **APRIL MULRONEY, Medidata**

More inclusive of diversity and the empowerment of the patient with management of their care. Quality will continue to drive how organizations and providers serve their communities in the healthcare landscape. — **VERONICA PICKENS, Inovalon**

Even more engaged in personal health and we'll be able to do more with that knowledge. Physicians will know everything there is to know, which will hopefully help to provide better solutions to patients. — **SARAH RADICSH, Havas Life New York**

More digital and more on-demand. — **KIMBERLY ROBINSON, Giant Creative Strategy**

Digital; technology advances will continue

to provide new and creative ways to reach HCPs and patients providing more seamless access to information, processes, and procedures and a shift in the in-office role of the representatives. — **NICOLE ROMANO, Publicis Touchpoint Solutions**

Offering more options for patients and enabling more informed individual-data driven decisions. — **EUGENIA RUTENBERG, Actelion Pharmaceuticals**

Shifting toward preventive medicine with a focus on shorter hospital stays, avoiding sickness vs. treating patients, and payers seeking ways to decrease cost through risk-based payment models. — **JENNIFER SHIMEK, KPMG**

Under pressure for better and more equitable care, which will continue to pressure the industry to innovate and make step-function changes working with other sectors and technologies. — **AMY STARCK, Deloitte Consulting**

Influenced by the outsourcing or offshoring of entry-level roles for information technology professions in the healthcare/life-sciences; longer term the impact will be a lack of experienced professionals to fill leadership positions in the field. — **KAREN VARI, Knowledgegent**

Consolidation in the delivery of healthcare as providers continue to merge through ACOs or other types of organizations; healthcare will continue to get closer and closer to patients with new solutions that enable them to manage their health. — **JACQUIE VEALEY, Quest Diagnostics**

Much more individualized, which will allow patients to receive the care that is the most effective for them and improving how care is selected and delivered improves patient outcomes while addressing many other ills in the healthcare ecosystem. — **MARILYN VETTER, Horizon Pharma**

2016 HBA Luminaries

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IRIS BAVA

Senior Director Quality Operations,
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BETH BECK

General Manager
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DEBBY BETZ

Chief Officer of Corporate Affairs
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BRIDGET BOYLE

VP and Site Head Human
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Roche Diagnostics



FRANCINE CARRICK, PH.D.

Executive VP, Chief Scientific
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MARY CHRISTIAN

Head, Oncology Academic Research
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Novartis Pharmaceuticals



JENNIFER DAMICO

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SABINA EWING

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LYN FALCONIO

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AMY STARCK

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healthcare is not lost and that potential policy changes do not burden the pharma industry in such a way that compromises or handcuffs manufacturers from conducting the necessary and needed research they execute today.”

Over the next five to 10 years, several experts also say the movement toward having more access to data being collected will become a reality.

“Medical records will be better organized and easier to access, which will make more de-identified information available to researchers who can use the information to understand treatment patterns, outcomes, enable early detection, etc.,” says Clare Tong, senior director, custom research, AlphaImpactRx. “Mobile devices will not only be able to make medical information more accessible to patients, HCPs will be able to better track their patients, such as checking in on compliance or checking how they are doing after a treatment.”

Healthcare Personalization

Personalized health has many definitions depending on who is doing the personalizing, but our experts agree that the movement to providing custom care is just beginning.

“I believe that in 2020 we will see a transformation of our healthcare industry,” says Raffaella Faggioni, senior director, R&D, at MedImmune. “We will definitely see more personalized healthcare, and consumers and payers being more selective in how they manage healthcare costs.”

Meredith Valentine, senior brand manager, Johnson & Johnson, also believes the business of healthcare will be more personalized by 2020, as digital capabilities and technology continue to broaden what’s possible.

“Millennial consumers already expect heightened levels of personalization in most other aspects of their life, and healthcare will be no exception,” she says.

On the opposite end of the spectrum is the looming coming of age of boomers and the challenges and opportunities that the silver tsunami will bring.

“Research suggests that there will be increased disease prevalence as the population ages, the healthcare landscape will continue to evolve given policy reforms to create greater access to healthcare treatment and medicines, and patients will continue to be empowered regarding their care management, particularly given the impact of technology and social media platforms that create incredible access to healthcare information,” says Rhonda Nesmith Crichlow, VP and head, U.S. diversity and inclusion, Novartis Pharmaceuticals. “My hope is that given these trends, by 2020, we will have new and improved models of engage-



Communications will be the key of healthcare business in 2020.

PAULINE NG

Phase Five Communications, a division of ghg

ment and partnership across the healthcare spectrum, so that we can work collaboratively to ensure that all patients understand their healthcare risks, options for care, and ultimately, improve their health outcomes.”

In 2020, more informed patients will be partners in their own healthcare.

“Patients are better informed about their genetic profile, they are true customers,” says Chiara Bergerone, senior business director Europe, Becton Dickinson. “They understand they have options and will use information and data about themselves and providers to get the best treatment at the time, place, and cost convenient for them. The home will become where much of the medical care takes place. Care will no longer be confined to clinicians in the clinics or hospitals.”

Personalization will also involve community-based care, says Adrienne Gonzalez, senior counsel, litigation and government investigations, Bristol-Myers Squibb. She adds, communities of color will continue to grow in terms of population and the unmet needs in those communities will also continue to rise.

“My hope is by 2020, there will be some dividends from proper investment by the healthcare industry into building credibility with these communities to gain access so that both sides can benefit from the partnership,” Ms. Gonzalez says. “We know that disease does not behave the same way from one group to another and to properly serve our patients, which will at some point include every human being fortunate to live long enough, we must invest in identifying and providing medicines that will truly meet the needs of the changing populations, factoring in racial and ethnic differences as well as becoming more creative in providing access to various segments of the population.”

Jani Hegarty, president, Health & Well-

ness Partners, emphasizes that great strides have been made in healthcare during the past few decades with life expectancy at birth increasing and deaths from CVD decreasing. Despite these important advances, public health challenges remain and health disparities must be addressed during the next five years..

Rachelle Jacques, VP, U.S. hematology marketing, Baxalta, envisions more participation of women and minorities in trials, improving the understanding of therapies across a broader and more representative population.

“With the evolution of technology and science, I expect we will be able to deliver increasingly personalized therapies, resources, and care,” she adds.

Better science is leading to innovative treatments and our panel of experts is hopeful that by 2020, new medicines will be developed for a variety of oncology and rare diseases.

“The future of healthcare requires the need to make breakthrough discoveries in personalized medicine,” Bridget Boyle, VP and site head human resources, Roche Diagnostics. “We must continue to make advances in what we do well today — delivering greater efficiency and value in diagnostic testing — and we must dive deeper into understanding how certain diseases respond to certain therapies to improve outcomes for individual patients.”

2016 HBA Luminaries



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JACQUIE VEALEY

Executive Director Segment
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MARILYN VETTER

VP, Government and Public Affairs
Horizon Pharma



Congratulations, Pauline Ng!

Pauline's passion and expertise separates her from the pack, and puts Phase Five Communications ahead of the game.

We are proud to honor her and all of the
2016 Healthcare Businesswomen's Association Rising Stars.

PHASE
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With more access than ever before, patients will be drivers of their own care and of change in the health industry.

SARA ALLEN
JUICE Pharma Worldwide

Ebele Ola, M.D., director, medical affairs, at Johnson & Johnson, is optimistic that the business of healthcare will showcase new and exciting innovations, and at the same time these will be tempered by cost-containment and new players in the business of healthcare data mining and interpretation.

"2020 will be a time of strong competition, requiring innovation and collaboration to assure success in this environment," she says.

"Hopefully we will have more cures for diseases such as cancer and we will further improve the level of access to affordable high-quality medicines for patients," says Michelle Quinn, VP, head legal, generics, Sandoz. "I think we will also see more choices for patients in terms of how and from whom they get their medicines."

Over the next four years, we will continue to see the importance of personalized medicine and the increased sophistication of patient engagement through the use of technology, says Sabina Ewing, VP, business technology, Pfizer.

"Patients will have greater, more convenient ways to manage their health as well as engage with their healthcare providers," she adds. "I'm also excited to see how immuno-oncology evolves in getting us closer to a cure for cancer."

Anne Keating, executive director, global development team leader, Astellas, who has worked in oncology drug development for more than 15 of her 21 years in the pharmaceutical industry, believes that healthcare will change to a more focused approach with decisions on therapy, both preventive and treatment, based upon a patient's genetic profile.

"Therapies themselves will also be more

directed to specific targets and will result in better outcomes for patients with less severe toxicities," she says.

Phuong Khanh (P.K.) Morrow, M.D., executive medical director, at Amgen, says in the oncology sector there will be an even higher bar set for achievement.

"Specifically, not only will the efficacy, safety, and risk-benefit profile of a treatment regimen be crucial to appropriate use, but demonstrating the holistic value of the regimen will be vital to ensuring access to life-saving drugs for patients," she says.

Kassie Wooton, senior staff liaison to the president and CEO at Mallinckrodt Pharmaceuticals, believes that healthcare innovation will make great strides by 2020 and hopes that there will be more cures and treatments available for patients with rare diseases.

"The U.S. healthcare system is generating tremendous innovation that could fundamentally change the length and quality of human life over the next decade," she says. "However, we're in a perilous political environment, where much of the discussion is focused on cost without the appropriate attention to value and innovation. There are solutions to the cost challenges we face in this nation and across the world, but it will take patients, providers, industry and the government working together toward a sensible solution that protects innovation and patient access."

As the life-sciences industry moves toward 2020, outcomes will continue to play an important role.

Debby Betz, chief officer of corporate affairs and communications, Indivior, says companies will be challenged to continually advance treatment to address the unmet needs of patients improving not only outcomes, but their overall treatment experience, while also delivering a strong value proposition to payers to ensure patient access to the most innovative treatments possible as the environment becomes even more cost-conscious.

"The business of healthcare will continue to become more focused on patient outcomes," says Belinda Drew, deputy director, global hemophilia strategic marketing communications and excellence, Bayer. "As healthcare coverage evolves, insurance companies may begin to put more emphasis on quality-of-life measures when determining the true cost of a treatment. Patients will be able to provide these data as they become more of a champion for own their health through smart devices that will detect more advanced biometrics than we can even conceive of today."

For Patrice Gilooly, VP, quality assurance and operations, Regeneron Pharmaceuticals, the hope is that healthcare innovations will be measured in more cures and less treatments;

longevity will be measured in more birthdays and less funerals; and there is more discussion of healthcare and less discussion of health cost.

"My fear is that patients will be forced to choose which treatments they can afford and research and development will be viewed as a bad return on investment," she says.

We are in a time of constant change within our healthcare industry, both in how healthcare is managed for the patients and in the decisions being made by the providers, says Deirdre Albertson, executive director, clinical research, inVentiv Health.

"I am encouraged by the increasing focus on rare diseases and treatments for patients who suffer from diseases that do not have a cure currently," she adds. "I would love to see healthcare in 2020 have many new treatments to offer these patients."

Nyra Bannis, director, patient services, Shire, predicts the business of healthcare will bring even more exciting advances in technology and much-needed treatments.

"Working in patient services for rare diseases, we are very excited about is the opportunity to use advances in technology as a platform to connect more with patients," she says. "It is our responsibility to ensure that we are being innovative

Women in Healthcare

Executive women provide guidance to other women to not only help advance their careers but improve overall healthcare.

My advice is to never shut down an opportunity without hearing it through.

PAMELA WILLE, PH.D.,
Flashpoint Medica

I set a positive example that I hope junior woman will emulate for what I deem necessary for professional success: respect, accountability, dedication, and professionalism. I listen, support, and coach women to be the best they can be.

ELIZABETH CICCIO, Skipta

Given the strong focus on hiring diverse talent, fostering a culture of flexibility, and nurturing the growth and development and confidence in women, I believe we will see a more diverse workforce including more women from all over the globe leading in all functions of the healthcare industry and achieving both personal and professional goals.

JENNIFER DAMICO, Pfizer



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Never shut down an opportunity without hearing it through.

PAM WILLE, PH.D.
Flashpoint Medica

in our approach to providing more education and resources to support our patients.”

There are definitely major shifts happening in healthcare that will make it a very different marketplace in 2020.

“We can already see new players entering the space as they seek to gain a share of healthcare dollars, be it in how healthcare is measured or how it is diagnosed, delivered, and treated,” says Bárbara Büchel, VP, global business director, Indigenus, the global network of the bloc. “Real-world outcomes and the overall value story will only gain importance as governments are pressured by the cost of providing healthcare to a growing population. Personalized medicine will become the standard and pharma companies will probably have to review their models to deliver true value. Getting a drug approved won’t be sufficient; it will have to be accompanied by a diagnostic tool that determines which patients will truly benefit from a treatment.”

Kris Cappo, director of forecasting at Teva Pharmaceuticals, says because of the movement toward patient-centricity the focus will be on delivering strong value and outcomes.

“Technology and innovation will drive improved healthcare data that will allow for a more personalized approach,” she says.

Value: But at What Price?

The debate around value and price is expected to continue until 2020 and beyond, as payers continue to push back on cost and companies continue to bring new and innovative products for unmet needs to the market.

“Market access pressures will continue to

impact how we run our business, from pricing and reimbursement to how we design trials to ensure we are showing patient-level benefit,” says Gina Fusaro, Ph.D., senior director, global scientific communications, solid tumors and early pipeline, Celgene.

Pricing and market access pressures will continue to be one of the most important business drivers in 2020, says Diane DiGangi Trench, head of account management, managed markets, Takeda Pharmaceuticals.

“The outcome of the 2016 political process will be critical in paving the way for important policy changes and shifts that will impact the landscape in 2020,” she adds. “The healthcare industry has to continue to enhance its value proposition to the public to have a seat at the table and be part of these important policy discussions moving forward.”

Shauna Horvath, director of client services, Cambridge BioMarketing, a division of Everyday Health, agrees that an increased focus on drug pricing, approvals, etc., will only continue.

“This scrutiny will cause pharma companies and agencies to think differently about how they approach the various aspects of their business,” she says. “On the positive side, there is a ton of innovation happening through technology and precision medicine. We will be better able to track health, diagnose patients, and develop innovative treatments.”

Beth Beck, general manager, McCann Health North America, believes over the next several years, there will be a true shift to value-based healthcare.

“This means we will see customers demanding value defined by both outcomes and cost-effectiveness,” she says. “This will also expand the power of governments, regulators, and insurers in that there will be a shift toward value-based payment structures. The healthcare market will most likely also be focused on preventing and managing illness, using approaches that combine pharmaceuticals with value-based programs and technology. Treatment options will increasingly be tailored to individual genomes and co-morbid conditions and patients/consumers will take a broader role in their own diagnosis, monitoring, and treatment. Patients will demand greater transparency, more control and convenience, and lower costs as well as more intangible benefits and tradeoffs in lifestyle and health and wellness.”

Meg McKenna, VP, U.S. surgical care sales, at Baxter Healthcare, describes the business of healthcare in 2020 in three words: affordable, convenient, and accountable.

“Through existing efforts we will find a way for healthcare to be more affordable for patients,” she explains. “Through data and predictive analytics we should be able to continue

to standardize more treatments/procedures in an effort to reduce costs. IDNs and vendor partners will need to find new ways to reduce hospital costs through operational efficiencies and the government and health plans will continue to develop new outcome measures to pay for performance. Manufacturers and suppliers will continue to be pressured to reduce costs and bring cost-effective innovation to market sooner. All stakeholders will be held accountable to improve the business of healthcare.”

“I envision all stakeholders coming together,” says Lisa Miller, Pharm.D., executive director, health care systems, at Purdue Pharma. “Lines will be blurred between payers, providers, and solutions companies. As the march to quality and value continue, all stakeholders will continue to evolve and find new ways to compete and contribute.”

Tara Schweitzer, national account director, Boehringer Ingelheim, envisions a healthcare environment where technology is maximized to ensure higher engagement and accountability of its stakeholders, including patients, providers, payers, manufacturers, and healthcare systems.

“While transparency and quality will continue to be critical to increasing value, I also believe consumer incentives, innovation, and competition will be critical to the sustainability and growth of the industry by year 2020,” she says.

Deena Ward, senior director, area accounts, Novo Nordisk, believes the industry will continue to move further down the path of value-based care.

“There will be a focus on quality and outcomes but with greater teeth in the game exposing risk on all sides of what is quickly becoming more of an octagon — payer, employer, IDN, provider, community, government, manufacturers, pharmacy — model,” she says. “All parties are seeking risk-based partnerships to align goals and seek greater outcomes.”

Jenny Sung, associate VP, evidence based medicine research, Sanofi, provides three trends that will come to bear by 2020.

“First, there is growing demand by healthcare decision makers for relevant, high-quality evidence of real-world comparative value — CER — and rigorous evidence appraisal,” Ms. Sung explains. “Second, there is a need to engage decision makers early and often throughout the product lifecycle and configure relevant internal and customer-facing resources to ensure decision makers’ requirements for evidence of value are met. And third, there is the potential opportunity for shift from transactional to collaborative relationships with health plans, via shared focus on improved patient outcomes/and quality.” ^{PV}

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