

A VISION OF the Future



HBA's Rising Stars and Luminaries honorees — almost 100 executive women — provide their insights on the trends they expect to impact the healthcare industry in the future.

PharmaVOICE asked the nearly 100 industry executives identified by their companies as HBA Rising Stars and Luminaries to identify the biggest trends they believe will impact the industry in the next few years. Top on their lists are innovation and value. They also tackle the topics of big data, patient-centricity, and health and wellness. For information about the Healthcare Businesswomen's Association (HBA) and its awards, visit hbanet.org.

Innovation

Within the life-sciences industry, innovation is tied into everything from big data and analytics to new scientific discoveries to



The evolution and increased sophistication of remote monitoring technology will continue to empower patients, connect communities, and allow healthcare providers real-time insights into a patient's health and well-being.

COLLEEN CARTER
JUICE Pharma Worldwide

breakthrough therapies to the digital transformation that is impacting delivery systems and commercialization.

One of the most exciting and impactful trends for healthcare is the advancing technology in the field of digital/data analytics, says Kate Priestman, VP, R&D strategy and portfolio, GlaxoSmithKline.

"From the ability to capture in-stream data from clinical trials for earlier signal detection than ever before, to the assimilation and integration of diverse sets of real-world data, the power of this emergent field is transformative and will allow the industry, regulators, and payers to accelerate the most effective medicines to market and to better compare and evaluate medicines for specific patient groups."

Els Poff, executive director, data integrity center of excellence, Merck, agrees that big data and data analytics will have a big impact on pharmaceutical operations and when deployed and used correctly will provide a competitive advantage.

"I truly believe that one of the largest underlying drivers that will continue to influence the life-sciences industry is the use of big data and analytics as a lever in our pursuit

for innovation and growth and to really drive a meaningful health impact to society," says Tanya Alcorn, VP, global supply chain, Pfizer. "In all areas of our industry and business, we are constantly automating and collecting mass amounts of data. The step change is that as a society patients are more willing to share their history and story openly on social media or sites such as 23andMe. This opens up our data sets and connects us directly with large populations of people. Creating simple user-friendly tools that enable us as an industry to mine large data sets and link normally unlinked data will drive clarity and agility in decision-making and allow us to anticipate trends that will really start to transform the way we make decisions today especially those in R&D."

Fabienne Schlup-Hasselmann, manufacturing director, Couvet site, Celgene, says collecting and managing data are key and will become even more critical for companies to remain both competitive and compliant.

"Data volume and complexity are increasing rapidly, just like the potential benefits they can bring to patients and to the industry," she says.



Over the next few years we will see a change in how clinical research is conducted and new therapies are tested, approved, and brought to market.

NICOLE PARAGGIO
Accenture

As part of the big data movement, Elena Cant, VP, commercial — vaccines, Takeda Vaccines, believes that the major impact on healthcare in the future years will be coming from the progress in artificial intelligence and big data analytics. "The combination of the enhanced ability to access and analyze disease information, patient data, existing clinical insights and publications, generation of more advanced modeling with predictive analytics, and better understanding of consumer behavior and trends through

CHOICE

Colleen Carter,
2017 HBA Luminary

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fellow award winners. **Shine On.**

social media will create new opportunities for breakthroughs in pharma R&D, pharma marketing, patient treatment, and healthcare services across multiple therapeutic areas,” she says. “Moreover, AI and an evolution in technologies will allow improving efficiency and accuracy in all aspects of healthcare and will have a positive impact on the patient experience and quality of life.”

Digital technology is driving change in all aspects of our lives, says René van der Merwe, senior director, clinical development, MedImmune.

“Making people more aware of their own health and involving them in their own healthcare management through digital technology will be a paradigm shift in how we develop drugs and treat patients,” she says. “The clinical trials arena will benefit by digital patient engagement, where the use of mobile apps coupled with the use of wearable sensors can be used as an aid to enhance patient recruitment and motivation as well as provide valuable real-world data providing better understanding of the patient’s response to treatment.”

The concept of patient engagement is leading to the movement of increased consumerism in the evolution of the healthcare industry.

“Consumers are empowered and are taking an active role in their healthcare treatment,” says Megan Persson, VP, management supervisor, McCann Echo. “This is being made possible due to technology such as wearables and telehealth. It will be important for the industry to continue to adapt to this concept as new technological advancements will educate and allow consumers to be even more actively involved in managing their overall health.”

Lindsay Olson, associate creative director, Giant Creative Strategy, agrees that wearable technology is a major trend that will greatly and instantly impact the patient. “From tracking one’s blood pressure, to monitoring one’s heart rate, exercise and sleep patterns, wearable technology will keep people focused and in touch with their health more than ever before and will provide a direct line to more informed care if they need it,” she says. “My passion for healthcare advertising stems from the positive impact therapies and medical innovations can have on patients, and their families. Advertising for the sake of good has been my constant motivator for more than 10 years.”

Colleen Carter, executive VP, applied innovation and customer solutions, JUICE Pharma Worldwide, says applying digital innovation in healthcare has been and will remain transformative.

“The evolution and increased sophistication of remote monitoring technology will continue to empower patients, connect communities, and allow healthcare providers re-



Emerging technologies are giving patients access to new innovations in real time enabling them to take charge and manage their own health.

LEVERNE MARSH
Novartis



We will fundamentally change the healthcare ecosystem if we can really put the patient at the center of our strategy.

LAURIE KOWALEVSKY
Lilly

al-time insights into a patient’s health and well-being.”

Megan Fabry, senior VP, director of engagement strategy, The Bloc, agrees that to truly move the needle, customers need to be engaged in a life-long narrative that empowers healthier outcomes.

“As digital technology becomes more and more ubiquitous, a shift away from brand-centric marketing and campaigns will be needed,” she adds.

Katharine Spayde, general manager, US, commercial operations, Abbott, says increased engagement of consumers in their healthcare through technology, such as wearables and connected apps and the data that are being generated by these devices, will become key to improving outcomes.

“We need to learn how we can work together as an industry to

As patients and caregivers demand more choice and control over their healthcare, the need for clinicians to have access to clear, concise, and clinically relevant scientific evidence to support treatment recommendations will be paramount.

JENNIFER DI BENEDETTO
The Lockwood Group



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**Leadership.
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Remarkable character.
2017 HBA Rising Star.**

Jenny Di Benedetto
Group Vice President, Strategic Services



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Years

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2017 HBA Rising Stars



TANYA BOTELHO SILVA ALCORN
VP, Supply Chain Planning
Pfizer



JASMIN BREITENBACH
Manager, Global Life Sciences
Advisory Services
EY



SUSAN BROWNE
Director, Discovery Research and
Head of Vivo Neurobiology
Teva Pharmaceuticals



NEELY BURKHARDT
VP, Marketing
Magellan Rx Management



JENNIFER CAHILL
Principal
North Highland



ELENA CANT
VP, Commercial — Vaccines
Takeda Pharmaceuticals



RUI CHE
KPMG
Managing Director
KPMG



EILEEN CHEIGH NAKAMURA
Senior Director,
Portfolio Management
Pfizer



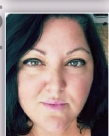
ALEXANDRIA CHERRY
Director Oncology
Marketing, Americas
Eisai



BARBRA CHURCO
Senior Director, Client Services
Doximity



CRYSTAL DARBY, PH.D.
VP, Client Services
The Scienomics Group



JENNIFER DEE
VP, Director of
Integrated Production
McCann Torre Lazur



ANISA DHALLA
Head of Ethics and
Compliance, Americas
UCB



JENNIFER DI BENEDETTO
Group VP, Strategic Services
The Lockwood Group



MONIQUE DOLECKI
VP, Investor Relations
BD



MEGAN FABRY
Senior VP, Director of
Engagement Strategy
The Bloc



SILVIA FREYRE
Manager, Clinical Operations
Inovalon



LINDA GRAY
VP, Program Direction
Health & Wellness Partners



JENNIFER GUDEMAN
VP, Medical Affairs
Maternal Health
AMAG Pharmaceuticals



LIBBY HOWE
Regional Business Manager
Bayer



AMY JAMISON
Senior Director, Client Services
Publicis Touchpoint Solutions



SONALI JASMIN
Senior VP, Planner
Ogilvy CommonHealth Worldwide



STEPHANIE KROGMEIER
Senior Director, Regulatory
Vertex Pharmaceuticals



SARÉ LARGAY
Head, Commercial Operations
and Project Management
Sanofi



Along with the rising patient-centric approach to healthcare, patients and caregivers are becoming more tech-savvy, and online social interactions are strengthening.

MAGGIE SMITH
Concentric Health Experience

make that information useful and actionable for both the provider and the patient, to ultimately drive better health outcomes,” Ms. Spayde says.

Suneela Thatte, VP, global operations, QuintilesIMS India, believes that in the coming years technology will improve access to healthcare through means such as telemedicine and e-clinics.

“The other change that I foresee is healthcare getting more and more patient-centric and hence patient support groups will have a big role to play in terms of shaping the future of healthcare,” she says. “Healthcare is a very complex subject — apart from the fact that we have to look at it from multiple dimensions such as medical, scientific, ethical, societal, emotional, legal etc., a key aspect that we as healthcare professionals need to bear in mind is that it touches the lives of billions of people across the world. People across the world have different healthcare needs and also differ greatly in their capacity to support healthcare for themselves and their families. It is therefore not surprising to see technology being integrated more and more with healthcare advances.”

Debbie Weitzman, senior VP, Cardinal Health, agrees that major changes in healthcare will be driven by technology.

“Technology in some form has always helped inventors and researchers bring new devices or treatments to diagnose, treat, or cure patients,” she says. “But now technology gives us instant access to information about availability and prices of products and services. This is shaping product development, the supply chain, the process and place that providers give services, and the models for

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Paul and the molecule that helps him breathe easier.

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VOICE

We Don't Make the Medicine. We Make It Matter.

Congratulations to all of this year's HBA Luminaries and Rising Stars, including our own Super Star, Maggie Smith. Thank you for making it matter every single day.



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THE YEAR

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2017 HBA Rising Stars



BEATRICE LAVERY
Senior Group Director,
Regulatory Affairs
Genentech



SUSAN LOGAN
Executive Director, Marketing
Amgen



LEVERNE MARSH
Executive Director, Marketing
Novartis Pharmaceuticals



ALLYSON MCMILLAN
Executive Director, Lung
and Head and Neck, U.S.
Commercial Lead
Bristol-Myers Squibb



APRIL MEIJER
Senior VP, Advocacy
Discovery USA



SUSANA MOREIRA
Group Account Director
Beacon Healthcare Communications



ADRIENNE MORGAN
Senior VP, Director of
Client Services
H4B Chelsea



ELIZABETH MURPHY O'KEEFFE
Senior Regional Business
Director, Neurology Sales
Lundbeck



CASEY MYBURGH
VP
Ketchum



MAJA NELSON
Senior Director, Sales Training
Actelion Pharmaceuticals US



ESTELLE ODET
Brand Activator
Merck KGaA, Darmstadt
Germany

With our industry continuing to focus on the value-based world of healthcare, the urgency to develop effective medicines that reach the right patients will only increase.

DR. DIANA CUCOS
inVentiv Health



payment or reimbursement. Now technology is being infused into every facet of healthcare and paradigms are being shifted or completely changed. Rapid change driven by technology combined with the need to provide better healthcare at a lower cost will drive evolution in healthcare worldwide.”

One of the biggest challenges the industry faces, says Heidi Spurling, associate director, corporate strategy, Ironwood Pharmaceuticals, is fostering sustainable innovation. “Remarkably, R&D productivity has not improved despite significant leaps in technology and scientific understanding, according to research by Accenture and others,” she says. “Thankfully, our industry has an interconnected ecosystem of knowledge and innovation — within industry and in partnerships with academia and research hospitals. Technology has made it possible to collaborate with researchers around the globe or down the street with more dimension and depth. I see our industry better leveraging these innovation networks and technology to more efficiently yield the next medical advancements. Bringing together our collective talents and providing broader perspectives using more diverse approaches to collaborative, open innovation strategies for example, I believe, will help close the productivity gap.”

Lynn Rochon, senior VP, group account director, TBWA\Worldhealth, agrees that scientific and technological innovation will continue to play a pivotal role in the advancement of breakthroughs in the healthcare industry.

“From therapeutic discoveries to cutting-edge delivery mechanisms to more precise information technologies, the healthcare industry will continue to focus on these developments to offer solutions that have an extensive global impact.”

At the heart of all this innovation are the patients being served. According to Leverne Marsh, executive director, marketing at Novartis Pharmaceuticals, emerging technologies

are giving patients access to new innovations in real-time, enabling them to take charge and manage their own health.

“The power of information aggregation, integration, and analysis provide unique opportunities for healthcare companies, such as Novartis, to meet patient needs by offering more tailored solutions,” she says. “These insights inform our ability to reimagine medicine and transform patient and provider services aimed to deliver an unparalleled impact on people’s lives.”

PhRMA’s new campaign, GoBoldly, is setting a new standard in driving the future

New technological advancements will educate and allow consumers to be even more actively involved in managing their overall health.

MEGAN PERSSON
McCann Echo



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We are proud to congratulate Diana Cucos as an HBA Luminary Honoree.



Diana R. Cucos, PhD

Senior Vice President,
Global Clinical Monitoring

HBA Luminary Honoree

Through continuous dedication and personal growth, Diana has excelled in her development of management skills, but most importantly the development of others in the Global Clinical Operations teams at inVentiv Health. From utilizing her leadership skills and business/data acumen to improve the way we do business, to helping the next generation of women in the industry, Diana is not only bringing a fresh perspective to our company, but transforming inVentiv, and the Clinical industry, into a better place to be.



2017 HBA Rising Stars



LINDSAY OLSON
Associate Creative Director
Giant Creative Strategy



CARRIE PALMER
VP and Deputy
General Counsel
Takeda Pharmaceuticals



NICOLE PARAGGIO
Strategy Senior Manager
Accenture



NEENA PATIL
VP, Legal Affairs
Novo Nordisk



KARIN PAYNE
Global Compliance
Quality Director
RB



MAGDALENE PEDERSEN
Chief of Staff, Global
President R&D
GlaxoSmithKline



MEGAN PERSSON
VP, Management Supervisor
McCann Echo



MELISSA PIROLLI
COE Lead, RWI Oncology
QuintilesIMS



ELS POFF
Executive Director, Data
Integrity Center of Excellence
Merck & Co.



ALIX RANCIER
Senior VP, Creative Director
CDM New York



MICHELE ROBERTSON
General Counsel,
Hospital Therapies
Mallinckrodt Pharmaceuticals



LYNN ROCHON
Senior VP, Group
Account Director
TBWA\WorldHealth



KRYSTLE RODRIGUES
Tax Director
PwC



CHRISTINE ROMEAN
VP, Client Services
M3 USA



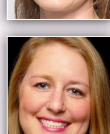
PUJA SAPRA
VP and CSO, Oncology
Research & Department
Pfizer



GERIANNE SARTE
Senior Finance Director,
Cardiovascular and
Specialty Solutions
Johnson & Johnson



FABIENNE SCHLUP-HASSELMANN
Manufacturing Director,
Couvett site
Celgene



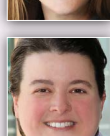
MAGGIE SMITH
Group Account Supervisor
Concentric Health Experience



KATHARINE SPAYDE
General Manager, US
Commercial Operations
Abbott



ARIANE SPIDEL
Manager, Design Control
Roche Diagnostics



HEIDI SPURLING
Associate Director,
Corporate Strategy
Ironwood Pharmaceuticals



NICOLE SWEENEY
Product Strategy Lead,
Global Hematology
Shire



MARIA TERENO
VP and Global Chief
D&I Officer
Boehringer Ingelheim



The emergence of biosimilars, advances in precision medicine, the focus on outcome-based medicine, and other trends will change the pharmaceutical industry's customer-facing deployment strategy.

AMY JAMISON
Publicis Touchpoint Solutions

of medicines through advances in personalized therapies, genomics, and immunotherapy, says Brianne Weingarten, head of alliance management, licensing and business development, Purdue Pharma.

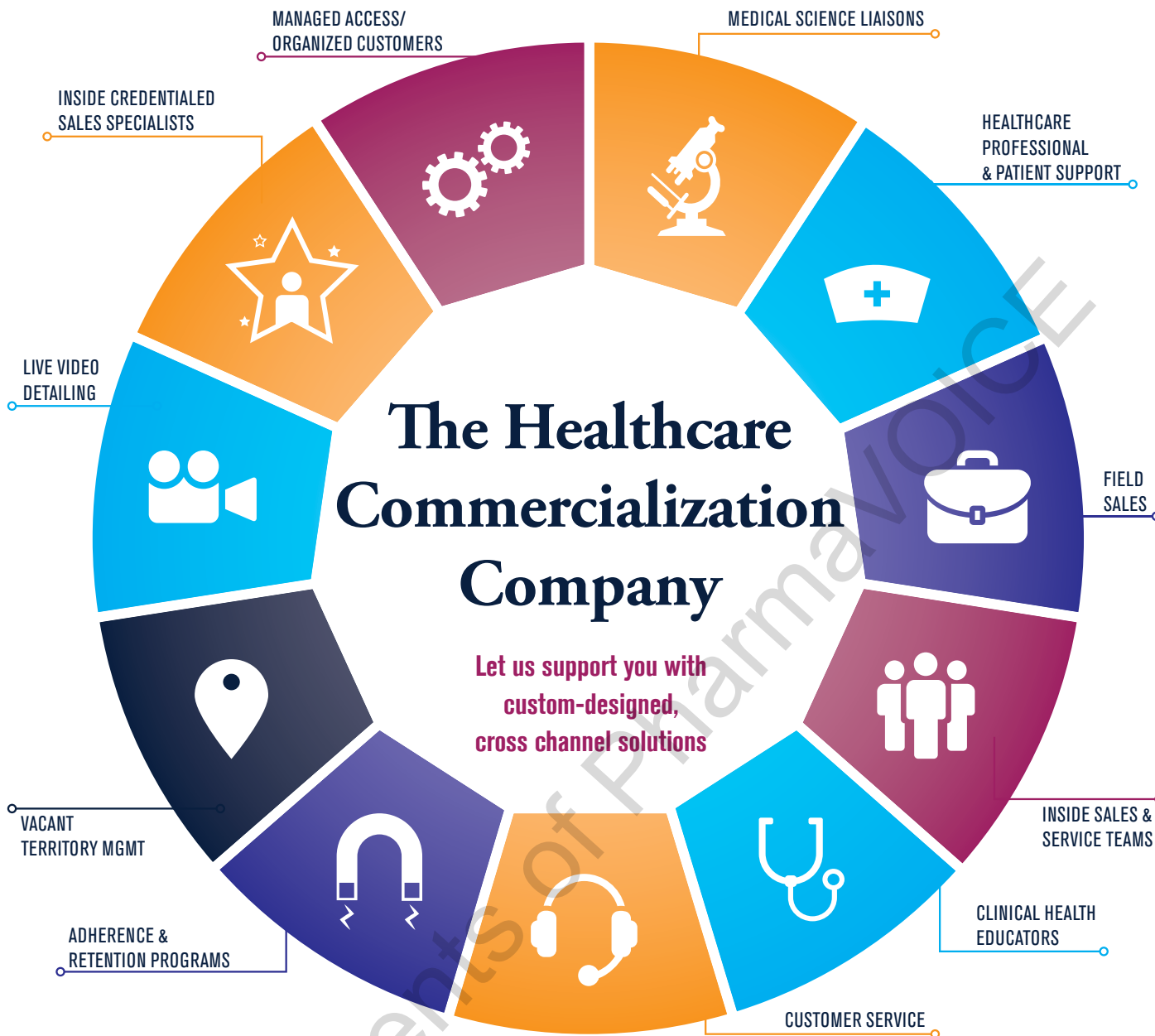
"With so many diseases yet to be cured, there is a heightened focus on drug development," she says. "Life-sciences and biopharmaceutical researchers will continue to explore innovative ways to reduce development times and boost the odds of success with the goal of delivering effective medicines to patients quickly and efficiently."

It's in the area of cancer treatments that seek to harness the body's own immune system to fight tumor cells that Simona King, head of finance, total company financial planning and analysis, Bristol-Myers Squibb, says will continue to have a big impact on the healthcare industry.

Elizabeth Murphy O'Keeffe, senior regional business director neurology sales, Lundbeck is excited by the possibilities around personalized medicine and predicts this movement will continue to grow in popularity over the next decade.

"This trend will include a shift toward a genotype-based approach to pharmacologic discovery, development, and treatment, and life-style changes based on genotyping," she says.

"By 2020, the pharmaceutical industry must transform itself to demonstrate the value innovative therapies will bring to patients,



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2017 HBA Rising Stars



LINDSEY THOMPSON
Senior VP, Brand
Business Leader
Marina Maher Communications



ANNA TRUDEL FLEMING
Senior Manager, Life Sciences
Advisory Services
EY



LERRYN TRZCINSKI
Executive Business Director,
Regional Accounts
Daiichi Sankyo



RENE VAN DER MERWE
Senior Director,
Clinical Development
MedImmune



EMILY WERT
Manager, Event Marketing
ISPOR - International Society for
Pharmacoeconomics and Outcomes
Research



ADILKA WHITE
Director of Healthcare Solutions
and Implementations
UPS

prescribers, and payers,” says Marie-Pierre Hellio, head of development Japan, member of the board, Pfizer Japan. “To accomplish this, the pharmaceutical industry must revolutionize the clinical development ecosystem so that new medicines and vaccines reach people faster. Partnerships with diverse organizations and utilization of new technology will be critical, and at the center of this transformation will be listening and incorporating the patient’s voice earlier into drug development, generating real-world evidence of effectiveness, and developing companion diagnostics for precision medicine.”

“Partnerability,” according to Alexandra von Plato, group president, North America, communications and media, at Publicis Health, will become the critical organizational capability for any company operating in healthcare in the next one to three years.

“No single company will be able to adapt and keep up with the accelerating pace of change in this space,” she says. “The ability to partner with an ever wider and more diverse set of players, including start ups, technology platforms, and content creators, both quickly and effectively will become a key competitive advantage for marketers, agencies, and consultancies. The need to identify and drive the right connections quickly and create win-wins that attract the best minds will upend the current procurement driven approach to vendor management. Fast, big ideas developed by new, surprising and often strange bed fellows will become a best practice for the most successful companies.”

On the clinical side, Nicole Paraggio, strategy senior manager, Accenture, says over the next few years there will be a change in how research is conducted and new therapies are tested, approved, and brought to market.

“The confluence of four things will drive this change; first is the growing profitability pressures life-sciences companies face as drugs become more expensive to make and drug pricing becomes increasingly scrutinized,” she continues. “Second is the higher demand from patients to be a part of the process and have input on study experience and study endpoints. Third is the evolving requirements of regulators when it comes to things such as real-world evidence. And lastly, is the industrial revolution where disruptive technologies will enable new channels of clinical and non-clinical data collection and analysis. I’m excited to partner with our clients to help navigate these changes and define what the clinical trial of the future will be.”

Patient-Focus

All of the technological advances in R&D



From therapeutic discoveries to cutting-edge delivery mechanisms to more precise information technologies, the healthcare industry will continue to focus on these developments to offer solutions that have an extensive global impact.

LYNN ROCHON
TBWA/WorldHealth

and delivery systems have companies re-evaluating their business and commercial models to be in a position to capitalize on the emerging benefits of being patient-focused.

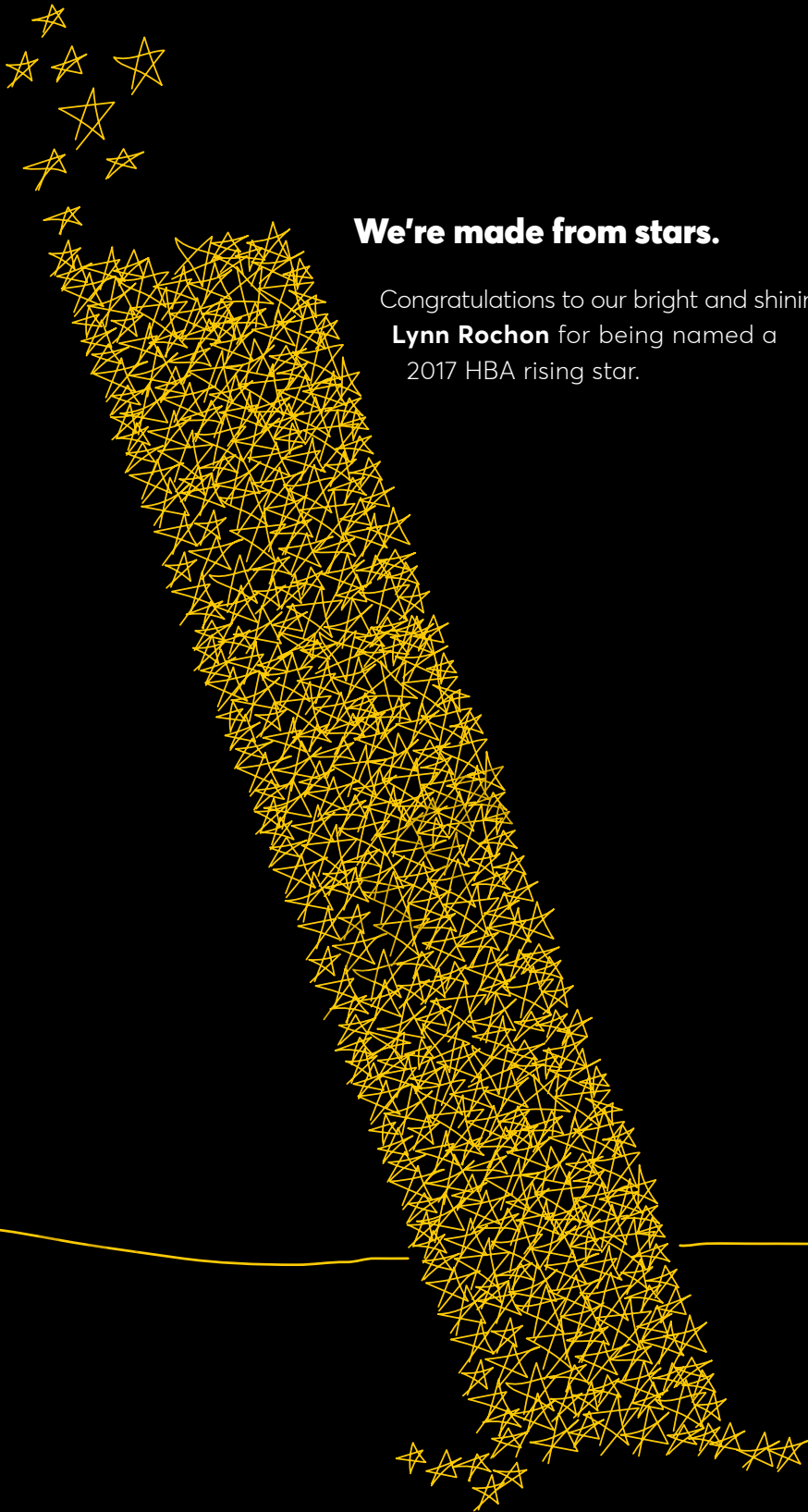
Along with the rising patient-centric approach to healthcare, patients and caregivers are becoming more tech-savvy, and online social interactions are strengthening, says Maggie Smith, group account supervisor, Concentric Health Experience.

“People of all ages and demographics are conversing online in search of everything from basic information to emotional support from peers,” she says. “As innovations evolve and online platforms expand, physician-to-patient online social engagements may not be far behind. This type of opportunity would create a shift in the patient-physician dynamic and have significant impact on treatment expectations from both the perspective of the patient/caregiver and the healthcare provider.”

Amy Jamison, senior director client services, Publicis Touchpoint Solutions, predicts there will be even more fundamental shifts in commercial models in the next few years.

“The emergence of biosimilars, advances in precision medicine, the focus on outcome-based medicine and other trends will change the pharmaceutical industry’s customer-facing deployment strategy,” she says. “We are experiencing a transformation from the traditional field sales rep into a highly skilled, flexible, cost-effective resource who can deliver not only personal promotion, but can educate HCPs and patients about emerging products,

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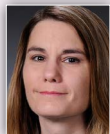
We're made from stars.

Congratulations to our bright and shining
Lynn Rochon for being named a
2017 HBA rising star.

2017 HBA Luminaries



MARY LOU AMBRUS
Senior VP, Communications
Pfizer



HEATHER ATTRA
VP, Manufacturing and Technical
Operations
Vision Care, Alcon, a Novartis division



COLLEEN CARTER
Executive VP, Applied Innovation
and Customer Solutions
JUICE Pharma Worldwide



DIANA CUCOS, PH.D.
Senior VP, Global
Clinical Monitoring
inVentiv Health



CLAUDIA CURTIS
Chief Employment Counsel
BD



BELINDA DALE
VP, Supply Chain
Shionogi



FRAN DEGRAZIO
VP, Scientific Affairs and
Technical Services
West Pharmaceutical Services



LESLIE DONWORTH
VP, Operations
McCann Managed Markets



ROSSANA GRAY
VP, Human Resources NA
Sandoz



KATHY HAINES
Principal
Deloitte



MARIE-PIERRE HELLIO
Head of Development
Pfizer Japan



DIANE HOLMAN
Senior VP, Talent and Culture
athenahealth



JULIE ISKOW
Executive VP, Chief
Technology Officer
Medidata Solutions



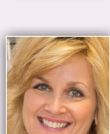
TINA KARUNARATNE
Director, Clinical and Late
Stage Project Management
Astellas Pharma US



MARIA EDUARDA KERTESZ
President, US Health
Johnson & Johnson



SIMONA KING
Head of Finance, Total
Company Financial Planning
and Analysis
Bristol-Myers Squibb



LAURIE KOWALVESKY
Senior Director, Global
Marketing, Immunology
Eli Lilly and Company



CHRISTINE LAFAVE
Company Director, Canada
Indivior Canada



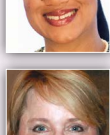
MAITE LASMARIAS
Regional Operations Director
Quest Diagnostics



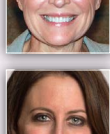
BETH LEVINE
Senior VP, Associate
General Counsel and Chief
Compliance Officer
Regeneron Pharmaceuticals



YOLANDA LYLE
VP and Assistant
General Counsel
Pfizer



TERESA MONTES
Senior Consultant
Knowledgeint



MELISSA MORROW
Partner/Executive VP, Director
of Client Services
Calcium USA



Partnerability will become the critical organizational capability for any company operating in healthcare in the next one to three years.

ALEXANDRA VON PLATO
Publicis Health

disease states, and innovative treatment therapies. We are scouting new talent with negotiating and problem-solving skills that were not pre-requisites for a customer-facing team of yesterday. In the future, there will be an increased need for clinical nurse educators and provider-based key account manager teams.”

Another trend that will impact the business models of today’s companies will be driven by the demographic change in the population — markets, customers, patients, and the workforce will be more diverse than ever before, says Maria Tereno, global chief diversity and inclusion officer, Boehringer Ingelheim.

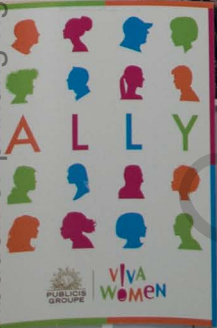
“By 2025, the fastest-growing generation will be older than 65; at the same time the millennial generation will be growing in organizations,” she explains. “Additionally, emerging market populations — especially Africa and Asia — will increase dramatically while mature markets will shrink. This means a geographical shift of market potential. Also, female participation in the workforce will continually increase, with a potential to add up to \$28 trillion to the annual global GDP. Pharma companies are looking for innovative business models, investing in new capabilities, and transforming their organizational cultures. At Boehringer Ingelheim, we are anticipating these trends by creating an agile and inclusive company culture in which the collective power of our diverse workforce is leveraged to continuously drive innovation, high performance, and growth.”

Complicated by an overwhelming amount of structured and unstructured data, under-

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WOMEN MAKE IT HAPPEN

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Publicis Health proudly supports the Healthcare Businesswomen's Association and celebrates 2017 Rising Stars and Luminaries everywhere.

2017 HBA Luminaries



MICHELLE PARSONS
Senior VP, Finance
Horizon Pharma



AMY POTT
Group VP-Head of US Commercial
Operations
Shire



CINDY POWELL-STEFFEN
Senior Director, US Marketing,
Brand Activation and Inside Sales
Bayer



KATE PRIESTMAN
VP, R&D Strategy and Portfolio
GlaxoSmithKline



ALISANDRA RIZZOLO
VP/General Manager Global
Customer Experience
Stryker



AMY SPEARS
DVP, Creative Advertising
and Design Services
Walgreens Boots Alliance



SUNEELA THATTE
VP, Global Operations
QuintilesIMS India



ALEXANDRA VON PLATO
Group President, North America,
Communications and Media
Publicis Health



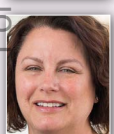
BRIANNE WEINGARTEN
Head of LBD
Alliance Management
Purdue Pharma



DEBBIE WEITZMAN
Senior VP, GM Cardinal Health
Puerto Rico
Cardinal Health



LING WU
VP, Medical Sciences, Education
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standing which trends to identify and to focus on can be difficult.

One major trend Jennifer Cahill, principal at North Highland, is focused on is the notion and evolution of patient empowerment.

“We are entering a new era when patients will demand more from the healthcare industry’s providers and payers,” she says. “The recent buzz around patient experience, the demand to develop value-based healthcare models, and the mounting social pressure on drug manufacturing companies to provide expanded access to investigational drugs — also known as compassionate use — are causing major shifts. The way that clinical trials are run today and the interaction with patients will be very different in the next three to five years, if not sooner. How we collect, organize, analyze, and share data regarding experimental drugs and biologics will create greater transparency, ultimately impacting pricing and reimbursement structures. It’s an exciting time of change in the industry and there is great momentum to propel our healthcare system forward.”

Adrienne Morgan, senior VP, director of client services, H4B Chelsea, says the future of healthcare has already begun with truly individualized treatment — from the development of customized medicine, accounting for factors such as genetic variability and biomarkers, to tailored management plans for handling adverse events and emphasizing overall health and wellness.

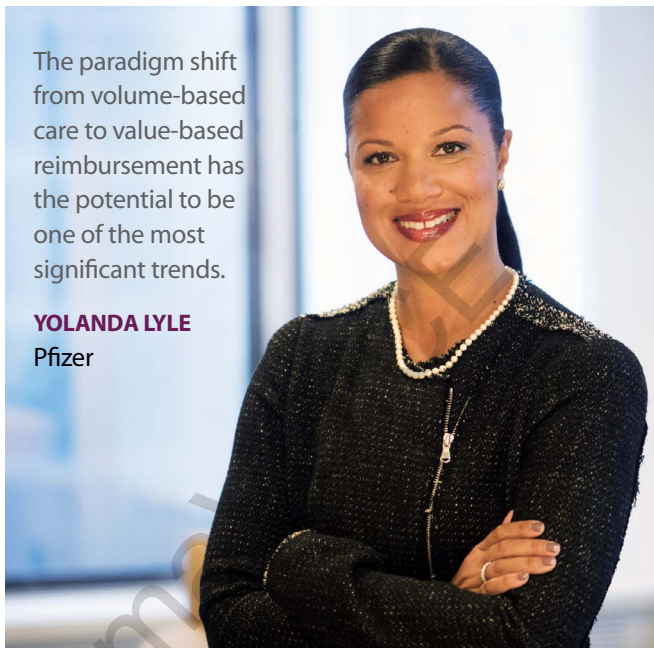
“Looking beyond just the next era of the actual treatments and considering holistic treatment plans will be critical to better serving patients,” she adds.

Laurie Kowalevsky, senior director, global marketing immunology, Eli Lilly and Company, believes the healthcare ecosystem can fundamentally change if the patient is really put at the center of the strategy.

“This means getting close enough to the patient and the healthcare decision-maker — women as the chief medical officers of their families — and beginning to deliver against the enormous gaps they face as they navigate their healthcare needs and the needs of their families,” she says. “This will require a level of engagement that pharma doesn’t really have the permission or trust to provide today, but it is critical we find innovative, relevant,

The paradigm shift from volume-based care to value-based reimbursement has the potential to be one of the most significant trends.

YOLANDA LYLE
Pfizer



I believe cancer treatments that seek to harness the body’s own immune system to fight tumor cells will have a big impact on the healthcare industry.

SIMONA KING
Bristol-Myers Squibb

and simple ways to engage women early and often. When we do, perhaps we can begin to close the gaps of knowledge, time, and trust, and ultimately empower the patient — the person we do this all for in the first place. This is the secret sauce for our future, and we have to adjust our strategies and business models to deliver against it.”

Jennifer Di Benedetto, group VP, strategic services, The Lockwood Group, predicts that

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as patients and caregivers demand more choice and control over their healthcare, the need for clinicians to have access to clear, concise, and clinically relevant scientific evidence to support treatment recommendations will be paramount.

“At the end of the day, we can reach clinicians through a variety of channels, but the information we share must be of the utmost integrity to provide value to their practice decisions,” she says. “Pharma companies have the opportunity to demonstrate their commitment to improving patient outcomes by grounding all of their efforts in the core science and data that support sound clinical decision-making.”

Value and Healthcare Costs

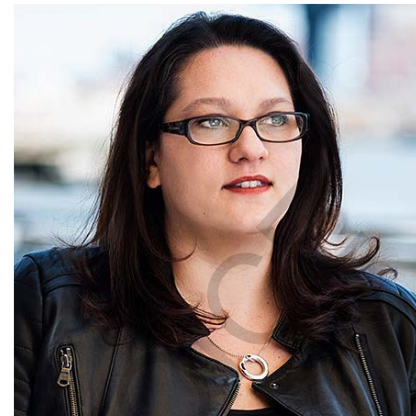
The U.S. healthcare market continues to evolve at a dramatic pace, and healthcare costs in the United States are expected to nearly double reaching \$5.5 trillion by 2025, according to CMS.

“The new administration has set an aggressive agenda that takes aim at some major healthcare trends,” says Rossana Gray, VP, human resources – NA, Sandoz, a Novartis division. “Key issues have become daily news

stories and have centered around the rising costs of healthcare. On the table are big issues such as healthcare reform and uncertainty about what that could look like. Drug pricing scrutiny has reignited the discussion on drug importation and direct government negotiations with manufacturers. This urgent demand for transparency into the complex payer landscape has thrust previously silent players, such as pharmacy benefit managers, into the limelight.”

In 2009, as part of the Affordable Care Act (ACA), the Biologics Price Competition and Innovation Act (BPCIA) created the pathway for biosimilar medicines to be available in the United States. Ms. Gray believes biosimilars promise to add competition into the U.S. marketplace and increase access and affordability to the important life-saving, life-enhancing medicines once the branded product loses its exclusivity. Biosimilars have the potential to save the United States \$44 billion by 2024.”

It’s no surprise that Emily Wert, manager, marketing and communications, at International Society for Pharmacoeconomics & Outcomes Research (ISPOR) sees the role of health economics and outcomes research (HEOR) becoming even more important over the next



To truly move the needle, customers need to be engaged in a life-long narrative that empowers healthier outcomes.

MEGAN FABRY

The Bloc

several years as the debate over health policy continues to be an issue.

Beatrice Lavery, senior group director, regulatory affairs, Genentech, believes there

The future of digital engagement belongs to Megan.



Here's to our rising star, Megan Fabry.

thebloc 

Trending...

COMPLIANCE



BETH LEVINE
Senior VP, Associate
General Counsel and
Chief Compliance
Officer, Regeneron

It can be easy for a compliance team in a highly regulated industry to give off an “us versus them” perception by policing employees with a “no, you can’t do that” approach and developing long-winded policies. At Regeneron, we have done the opposite, creating an approachable environment that encourages ongoing collaboration with employees. While many companies in the industry have had to focus on correcting bad habits and bringing the business, often reluctantly, into the compliance environment of today, our compliance culture was built within the existing compliance framework. We work collectively with our business partners to achieve corporate goals in a manner that comports with applicable laws, regulations, and standards. Doing the right thing is something we celebrate year round. It is a core value and is practiced every day. We see a common and consistent commitment to doing the right thing and putting patients first. Whether it’s a field representative ensuring their interactions with physicians are appropriate, a bench scientist taking meticulous and accurate notes of their experiments, or a clinical researcher ensuring that our study protocols keep a patient’s best interest in mind — operating with integrity is a common genetic component of every Regeneron employee.

CREATING TRUST



LINDSEY THOMPSON
Senior VP, MMC

We live in what MIT Labs calls “the filter bubble.” We only let in information and brands that we choose, and only listen to sources we trust. The level of personalization, relevance, and authenticity individuals expect from brands they let inside

their bubbles has never been higher — healthcare brands, especially.

By using data to target the message, emotive storytelling to connect, and novel methodologies to quantify impact, healthcare marketers have the opportunity to penetrate the filter bubble, change behavior, and influence people to think, feel, and act like their healthiest selves. This is what drives me. I’d rather have a difficult day figuring out how to convey life-saving and life-restoring information than the best day imaginable developing content to sell a mop or a car.

DIVIDED ECONOMIC LANDSCAPE



APRIL MEIJER
Senior VP, Advocacy,
Discovery USA

Healthcare costs will continue to shift to the consumer, creating an intensely divided economic landscape of those who have and those who have not.

Increased economic disparity will drive underserved communities to respond with innovative, home-grown solutions that are not medically driven, to address their lack of equitable access.

HEALTH EDUCATION AND COMMUNICATION



CASEY MYBURGH
VP, Ketchum

There is a mounting hesitation to accept incoming information as truthful and unbiased; as a result, our health system — including government agencies, policymakers, public health officials, and providers — faces an uphill battle when it comes to health education and communication. This public scrutiny and suspicion of authority will continue to be at the heart of evolving healthcare communications efforts, which are driven by themes of disease awareness, altruistic education, patient empowerment, and overall promotion of health. Where gaps of confidence appear to be growing, we will see new public-private partnerships that are founded on transparency to ease public concerns, accompa-

nied by a greater effort to meet the demand for concrete science and personalized, patient storytelling to inform breakthrough healthcare communications strategies and campaigns. This kind of collaborative approach will help to calm uneasiness while delivering valuable healthcare innovation and cross-industry solutions that have the potential to address confidence voids and fulfill unmet needs.

HEALTH & WELLNESS



JENNIFER DEE
VP, Director of
Integrated Production,
McCann Torre Lazur

With more than 20 years of experience in the healthcare communications industry, I believe one of the most exciting trends starting to take shape is the shift to a health and wellness model. For decades physicians have been treating the sick. Now, the idea of promoting and maintaining overall wellness to help prevent future disease — not only to extend longevity but also to improve quality of life — can change the way patients view their time with their physicians. Replacing the dread of the annual physical exam with a doctor visit that provides an individual with the opportunity to take part in his or her wellness has the potential to be a game changer in our industry. This approach to prevention not only benefits individuals on a personal level it helps contribute to a societal shift that not only promotes overall health and happiness, but also saves lives.

HONESTY AND INTEGRITY



CHRISTINE LAFAVE
General Manager,
Indivior Canada

The pharmaceutical industry has undergone tremendous change over the last decade and I believe, in the best interest of patients and payers.

To respond to the ever-challenging and regu-

Trending...

lated environment in which we all find ourselves operating in, I know success will come from conducting ourselves with honesty and integrity and making every decision with a dedicated focus on patients and overall health outcomes for our communities.

Our industry has a tremendous opportunity to play a leadership role, in partnership with governments and stakeholders nationwide, in addressing various public health needs.

Each interaction needs to add value to these stakeholders. Let's make our work really matter.

MILLENNIALS



ESTELLE ODET

Brand Activator, Merck KGaA

Millennials as patients — those born between 1980 and 2000 — have already started to transform the healthcare industry. For example these individuals' expectations in terms of digitalization for information seeking or connection to other patients are different from other generations.

But I am convinced that millennials as employees could make a much bigger impact in our organizations if we succeed in making healthcare a really attractive sector, which would allow us to recruit, keep, and develop millennial talent.

To succeed, companies need flexible and transparent leadership models, encouraging open feedback, employee empowerment, and more work/life flexibility — these are key to make healthcare attractive for millennials. Various studies have shown that companies with highly engaged employees increase creativity, productivity, and bottom-line performance. This is especially true with engaged millennials. Companies need full support given to middle managers, especially those with millennial teams, not only actively involving them in that leadership transition but

also giving them freedom to reward and recognize performance. There needs to be organizational simplification. As healthcare organizations become larger and more complex, leadership positions follow the same trend, requiring always larger sets of competencies. Organizational simplification can expand millennial's perspective: it is motivating and aspirational for them to see accessibility in senior leadership roles within their organization.

NEW DOSAGE FORMS



FRAN DEGRAZIO

VP, Scientific Affairs and Technical Services, West Pharmaceutical Services

One interesting trend that requires our industry to rethink how we bring a medicine to market is the move from mostly oral formulations to injectable dosage forms. This is, of course, due to the growth of biologic drugs versus small-molecule drug entities. In fact, if we examine drug approvals in 2016, oral medicines accounted for just 46% of approvals, down from an average of 56% in the 15 years prior, while injectable medicines accounted for an impressive 39%, versus a previous 26% average. It is anticipated that this trend will continue over the next several years. This will require better injectable delivery systems to improve the patient experience. Patients do not want the burden of painful, inconvenient injections, so we will see more demand for wearable systems, easy-to-use autoinjectors, and more convenient infusion pumps.

Delivering these patient-centric, innovative, and intuitive devices will require collaboration across our industry, from device manufacturers to pharmaceutical companies to providers, as well as training to ensure patient comfort and compliance to therapy.

will continue to be increasing healthcare costs and uncertainty regarding healthcare coverage, which will create barriers to patient access to important treatments.

"This may mean a shift toward generics

and biosimilars," she says. "As leaders in this industry, it is important for us to ensure a clear focus on science, be agile, and incorporate the patient voice to promote continued innovation for patients and improving healthcare overall."

Diana Cucus, Ph.D., senior VP, global clinical monitoring, inVentiv Health, says with our industry continuing to focus on the value-based world of healthcare, the urgency to develop effective medicines that reach the right patients will only increase.

"All of us supporting drug development will have to work within this new paradigm and find more effective use of resources to run clinical trials — where the patient data are monitored and reviewed in real time, benefit-risk profiles are continuously remodeled, and utilization of advanced analytics allows conclusions to be drawn faster."

Yolanda Lyle, VP and assistant general counsel, Pfizer, predicts that among the many trends that will impact healthcare over the next few years, the paradigm shift from volume-based care to value-based reimbursement has the potential to be the most significant.

Leslie Donworth, VP, operations, McCann Managed Markets, a McCann Health Company, agrees noting that as health insurance plans shift more costs to their members, patients are becoming more sensitive to the price and value of their healthcare purchases.

"This is a key contributing factor driving patients to become more engaged in their healthcare decisions," she adds. "Key dynamics driving consumerism in healthcare include: millions of newly insured patients, who are evaluating insurance options, increased cost-sharing driven by payers, greater health information transparency and availability of self-management tools, and the increased use of patient-assistance programs."

Maite Lasmarias, regional operations director, Quest Diagnostics, states there has been an evident shift in the healthcare industry from volume to value-based healthcare.

"It has become apparent that access to data that lead to actionable insights result in improved quality of care and financial performance of practices," she says. "For patients, there is increased involvement and taking greater responsibility for their health and decisions that affect it. With increasing patient financial responsibility, consumers are more engaged in how and when to spend on healthcare services."

Teresa Montes, senior consultant, Knowledge Group, says from new therapy development to hospital visits, controlling healthcare costs is an essential part of the industry's mission.

"We face a belief that costs are indefensibly high, villainizing our efforts and eroding public trust," she says. "Our challenge is to position healthcare's life-saving work in the public discussion and to be an integral part of the solution." 