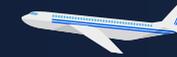


# American Strategic Portfolio Management in Life Sciences – West Coast



Updated: 23 January, 2025  
for the latest programme update,  
please download agenda on  
conference website



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Driving Innovation and Excellence in Pharmaceuticals, Biotech, Medical Devices and Diagnostics



January 29 – 30 | 2025



San Diego | CA, USA

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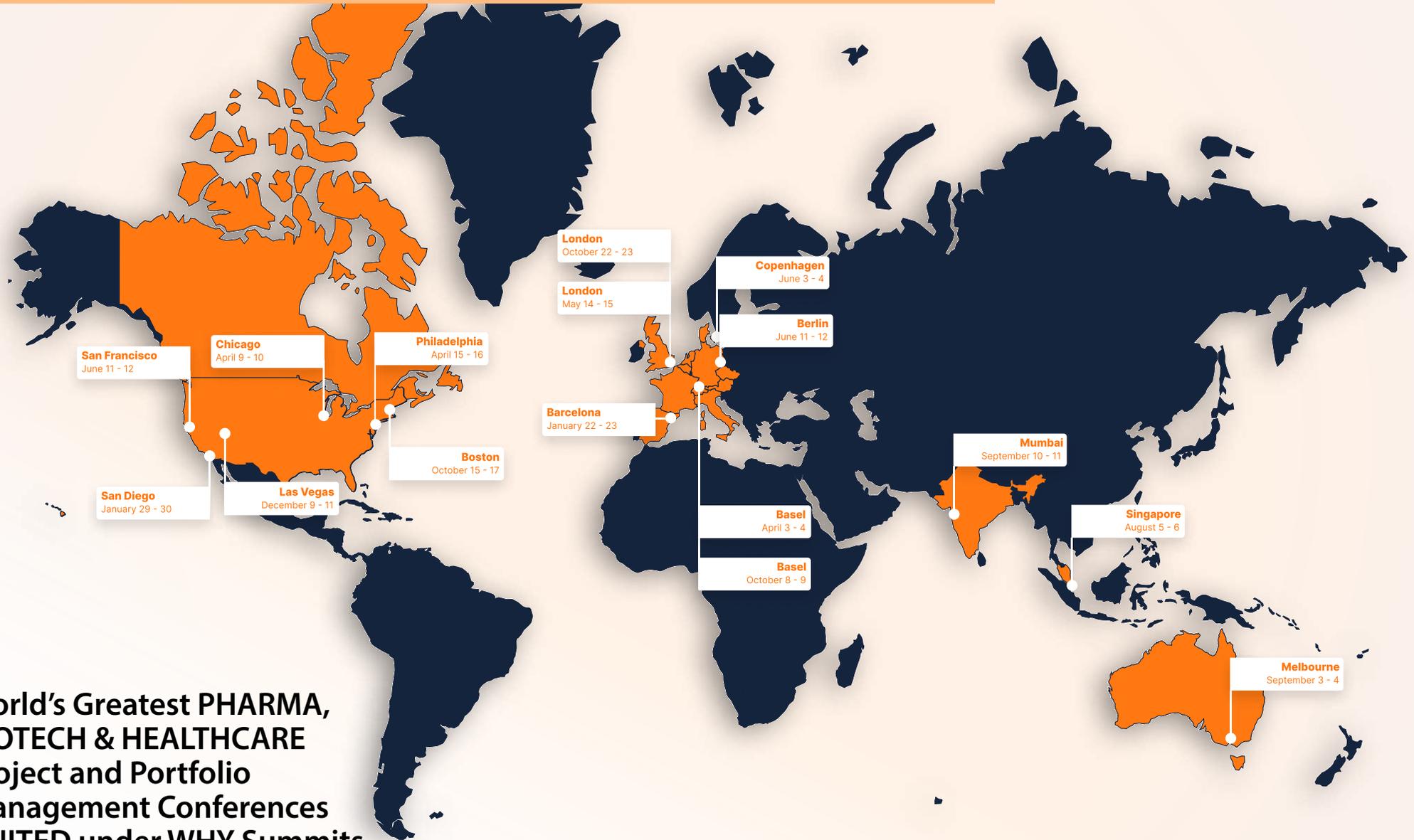
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# 2025 PPM Summits Worldwide



World's Greatest PHARMA,  
BIOTECH & HEALTHCARE  
Project and Portfolio  
Management Conferences  
UNITED under WHY Summits  
PPM WORLD TOUR

# Testimonials



**Blerim Shkodra**  
Sr Director Capital Procurement &  
Category Leader  
Lonza  
★★★★★

It was a real pleasure being part of this great event.



**David Swift**  
Senior Procurement Leader  
Lonza  
★★★★★

Great discussions and insights from some of the best in the business



**Mugunthan Maheswaran**  
Sr Project Manager, Technology,  
Digital & Operational Excellence  
Roche  
★★★★★

It was a very transparent discussion on Agile, waterfall and hybrid methodologies. I have fully enjoyed participating in this panel!



**Christophe De Vleeschouwer**  
Director, Pipeline Project  
Management  
GSK Vaccines  
★★★★★

Very good and engaging discussion! Thanks Why Summits for being part of the panel



**Bhaskar V. Sathaye**  
Lead Project Engineer  
The Janssen Pharmaceutical  
Companies of Johnson & Johnson  
★★★★★

A big bravo to the Why Summit Team for organizing the great conference. Excellent speakers, fantastic attendee!



**Noel Decker**  
VP and Head, Science & Development  
Project Management, Strategy and  
Business Operations  
Emergent BioSolutions  
★★★★★

Reflecting on my participation in the 22<sup>nd</sup> American Pharma and Biotech Project, Program, and Portfolio Management Conference in San Francisco last week, I am inspired by the wealth of knowledge shared and the incredible community of experts and lifelong learners I had the pleasure of working with and connecting to.



**Zane Zaleska**  
Senior Project Manager  
★★★★★

The Why Summit conference touched not only my mind, but also my heart. So many presenters emphasized the people skills and common sense in PPM which aligns with my personal values. At the core of every project are people and their wellbeing



**Raffaele Marranzini**  
CEO  
Platflow  
★★★★★

Thank you for giving me the opportunity to speak in front of this specialized PPM audience within the broader context of PLM.



**Peter C. Luke**  
Project Corporate Vice President - API  
Expansion  
Novo Nordisk  
★★★★★

Thanks for the opportunity to share lessons learned at the conference. Also, very well planned and managed event with great speakers and highly relevant network. Big thanks to Radoslava Gregová and Tomas Rendek for their very professional support.



**Emmanuel Happe**  
Senior Leader | Global Director  
★★★★★

Thanks to Why Summits and the Great Speakers and Panels. Very inspiring. So many great things to do to provide a better Life for our patients



**Dhawal Upadhyay**  
General Manager - Global Program  
Management  
Intas Pharmaceuticals  
(Biopharma division)  
★★★★★

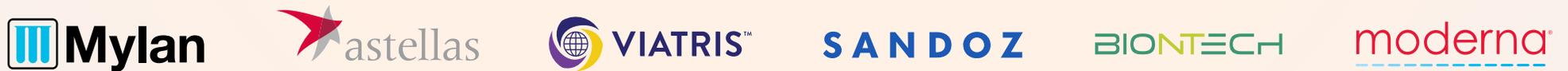
It was an honor to be part of such a prestigious event and to contribute to discussions. Thanks Why Summits for the opportunity to engage with such a knowledgeable audience and networking with industry leaders !!



**Dave Penndorf**  
PPM Advisor  
Groundswell Pharma Consulting,  
LLC.  
★★★★★

Always a fun time MCing the Why Summits conferences! It's the intersection of a topic I'm so deeply passionate about (PPM), the industry I know so much about (life science in general, pharma in particular), and the people who - dare I say it - have become my friends.

# Industry Pioneers Attending From

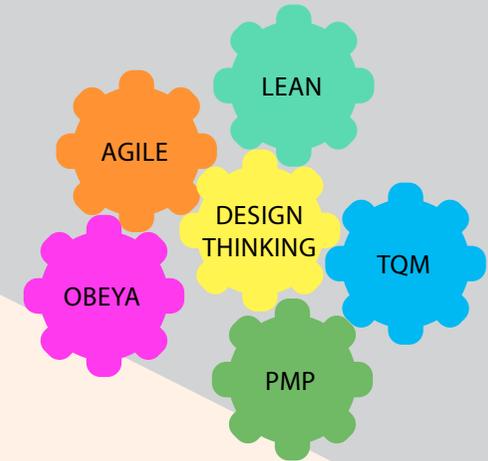


# Special Features

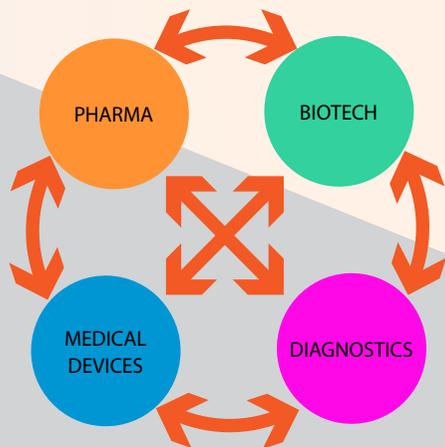
**Partnership Roundtable Discussions:** Facilitated discussions focusing on cooperation and partnerships between pharma, biotech, medtech, and diagnostics. These sessions will explore how collaborative efforts can lead to innovations, improved patient outcomes, and accelerated time-to-market for new therapies and technologies.



**Unique Panel Discussions:** Panels featuring representatives from each sector will provide diverse perspectives on strategic portfolio management. These discussions will highlight sector-specific challenges, best practices, and successful case studies.



RISK MANAGEMENT



**Targeted Workshops:** Attendees can choose from various workshops tailored to specific circumstances and needs. Topics will include Agile Methodology, Lean Six Sigma, Risk Management, and more, providing practical tools and techniques for enhancing portfolio management practices.

# Conference Overview



## “Strategic Portfolio Management for LifeSciences Innovation”

The life sciences sector on the West Coast, particularly in San Diego, faces numerous challenges as it strives to innovate and improve patient outcomes. This conference will bring together leaders from the pharmaceutical, biotech, medical devices, and diagnostics industries to address these challenges and explore strategic portfolio management (SPM) as a vital tool for driving success.

### Pharmaceuticals

- **Regulatory Complexity:** Navigating stringent regulations while accelerating time-to-market.
- **R&D Costs:** Managing high research and development costs and optimizing resource allocation.
- **Market Competition:** Innovating to stay competitive in a rapidly evolving market

### Medical Devices

- **Product Development Cycles:** Managing long and complex development cycles.
- **Quality Assurance:** Maintaining high standards of quality and safety.
- **Integration with Digital Health:** Adapting to and integrating digital health technologies.

### Biotech

- **Scientific Uncertainty:** Managing risks and uncertainties in research and development.
- **Funding and Investment:** Securing sufficient funding and managing investor expectations.
- **Regulatory Hurdles:** Ensuring regulatory compliance and timely approvals.

### Diagnostics

- **Technological Innovation:** Keeping pace with rapid advancements in diagnostic technologies.
- **Regulatory and Market Access:** Navigating regulatory pathways and achieving market access.
- **Data Integration:** Effectively integrating diagnostic data with healthcare systems.

**Conference Objectives:** This conference aims to provide life sciences professionals with practical strategies and tools for leveraging strategic portfolio management to overcome these challenges. By sharing insights, case studies, and best practices, we aim to foster innovation, improve efficiency, and drive successful outcomes across the pharma, biotech, medical devices, and diagnostics sectors.

## 1. Innovation and R&D Portfolio Management

- **Managing Portfolios Focused on Innovation and Research:** Strategies to balance innovative projects with regulatory and market demands.
- **Balancing Innovation with Regulatory and Market Requirements:** Navigating regulatory landscapes while fostering innovation.
- **Strategies for Fostering Innovation within Portfolios:** Practical approaches to drive a culture of innovation.

## 2. Prioritization and Selection of Projects

- **Methods for Evaluating and Prioritizing Projects:** Techniques to effectively prioritize projects.
- **Criteria for Selecting High-Value Projects:** Identifying and selecting projects that offer the highest value.
- **Balancing Short-Term Wins with Long-Term Goals:** Balancing immediate gains with strategic long-term objectives.

## 3. Governance and Decision-Making Processes

- **Establishing Governance Frameworks for Portfolio Management:** Creating effective governance structures.
- **Decision-Making Models for Portfolio Management:** Structured decision-making processes to ensure informed choices.
- **Role of Leadership in Effective Portfolio Governance:** Leadership's role in governance, strategic alignment, and accountability.

## 4. Resource Allocation and Optimization

- **Strategies for Effective Resource Management:** Optimizing resource allocation to maximize productivity.
- **Optimizing Resource Allocation to Maximize Productivity:** Techniques for efficient resource utilization.
- **Addressing Resource Constraints and Bottlenecks:** Solutions to overcome resource limitations and ensure smoother project execution.

## 5. Performance Measurement and KPIs

- **Key Performance Indicators for Portfolio Management:** Identifying and tracking critical metrics.
- **Techniques for Measuring and Tracking Portfolio Performance:** Methods for continuous performance monitoring and improvement.
- **Using Data Analytics for Performance Improvement:** Leveraging data analytics to enhance project outcomes.

## 6. Technology and Tools for SPM

- **Overview of Tools and Software for Portfolio Management:** Introducing the latest tools for effective portfolio management.
- **Demonstrations of Key Features and Benefits:** Live demonstrations of key tool capabilities.
- **Integration of Tools with Existing Systems:** Ensuring seamless integration with existing systems for efficiency.

# Speakers



Planisware

## Aimee Rodrigues

VP of Life Sciences  
Planisware



AVIDITY  
BIOSCIENCES

## Ching Chang

VP, Portfolio Strategy &  
Program Management  
Avidity BioSciences



Planisware

## Elise Mascret

Account Director  
Planisware



AVIDITY  
BIOSCIENCES

## Ernest Chow

Senior Director, Portfolio  
Strategy  
Avidity Biosciences



IONIS

## Hannah Klaeser

Associate Director,  
Portfolio Planning  
Ionis Pharmaceuticals



xencor

## Heather Gouvis

Executive Director,  
Project Leadership and  
Alliance Management  
xencor



regoconsulting

## Jacob Cancelliere

VP, Account Enablement  
Rego Consulting



zentalis

## Joe Stalder

Vice President, Program  
Management  
Zentalis Pharmaceuticals



REGENERON

## Katie McGohan

Director CMC Program  
Management  
Regeneron



Bristol Myers Squibb

## Kathryn O'Neill

Director, Portfolio &  
Strategic Operations Lead  
Bristol Myers Squibb



NEUROCRINE  
BIOSCIENCES

## Kristen Black Villanueva

Director of Program  
Management  
Neurocrine Biosciences



REGENERON

## Lindsay Darling

Director, Companion  
Diagnostics Portfolio  
Management & Operations  
Regeneron



BD

## Madhavi Pokkuluri

Head of Released Product  
and Process Excellence  
BD



CAPTARIO

## Magnus Ytterstad

Head of Customer Success &  
Portfolio Analytics  
Captario



aspen  
biosciences

## Mark Fortner

Founder & CEO  
Aspen Biosciences



Genentech

## Maria Bagniewska

Senior Director, Head of  
Portfolio and Operations,  
gRED Computational  
Sciences  
Genentech



illumina

## Martin Brum

Director, Program  
Management  
Illumina



## Michael Delitala

Founder, Delitala Quality  
Consulting & Author  
Corporation



Lilly

## Michael Myers

Associate Vice President  
- Lilly Research Labs, Due  
Diligence  
Eli Lilly



Planisware

## Moussa Gherbi

VP of Customer Success  
Planisware



Edwards

## Nasim Sheida Boggs

Vice President, TMTT  
Program Management  
Office  
Edward Lifesciences



Crinetics

## Natalie Rossignol

Vice President, Project,  
Portfolio and Alliance  
Management  
Crinetics Pharmaceuticals



ACCEL  
MANAGEMENT GROUP

## Noel Sobelman

Partner  
Accel Management Group



## Rich Hanser

Principal  
DTR Consulting



bridgebio

## Rohit Chawla

Vice President, Head of  
Program Management  
BridgeBio



UC San Diego

## Ruben Abagyan

Professor  
University of California San  
Diego



AVIDITY  
BIOSCIENCES

## Sarah Hudson

Executive Director, Portfolio  
Strategy and Program  
Management  
Avidity Biosciences



Edwards

## Tim Rumbaugh

VP, THV Program  
Management  
Edwards Lifesciences



regoconsulting

## Wes McCoubrie

VP, Delivery  
Rego Consulting

# Day 1

8:35 Chairman's Opening Remarks  
**Michael Myers**, Associate Vice President - Lilly Research Labs, **Due Diligence**, **Eli Lilly**

8:45 **KEYNOTE: AI IS NOT YOUR NEXT STEP – GET YOUR HOUSE IN ORDER FIRST**  
AI in Project Management is more about project management than AI. We first simplify projects down, then build them back up into a system that can be applied to any project in the world. You will begin to see the extent of project performance data that can be captured, measured and analyzed; essential before ever considering how AI can work for your company. AI is just a tool. Projects are about people. And processes are their bridge. With the right perspective and discontinuous improvement, we can be practically ready for humanity's next great technology.

Key Take-Aways:

- It's all about AI readiness; which means it's all about the data. Clean. Sufficient. Complete. Accurate. Representative of the current state. With distinguishable failures and successes.
- Consideration for whether humans, policies, procedures, and regulations, will have the capacity, willingness, and systems to accept AI-generated inputs/ outputs.
- Companies must recognize the benefit of existing PM technologies to appreciate the resources required for AI and the resulting changes.

**Tim Rumbaugh**, VP, THV Program Management, **Edwards Lifesciences**

9:30 **AI SYNERGY: ENHANCING R&D INNOVATION AND PORTFOLIO MANAGEMENT WITH AI-POWERED PPM TOOLS**

This presentation explores how Project and Portfolio Management (PPM) tools can significantly enhance R&D innovation and portfolio management. By integrating artificial intelligence, organizations can optimize resource allocation, streamline decision-making, and improve project prioritization based on real-time data and predictive analytics. The session will demonstrate how coupling AI with team collaboration, ensures an organization identifies emerging trends and mitigates risks all while enabling R&D teams to stay agile and focused on high-impact innovations. Attendees will gain insights into industry trends for leveraging AI-driven PPM tools to accelerate the development of cutting-edge products and maximize the strategic value of their R&D portfolios.

Key Take-Aways:

- Improving R&D Efficiency: Ensuring organizations are working on the right projects, at the right time and with the right resources.
- Enhancing Innovation: PPM tools provide visibility into ongoing projects, helping organizations identify areas for innovation, track emerging trends, and encourage collaboration among R&D teams.
- Optimizing Portfolio Management: Drive better decision-making by allowing organizations to assess and prioritize projects based on strategic alignment, ROI, risk, and resource availability.
- Risk and Resource Management: Proactively manage risks ensuring that R&D initiatives stay on track despite potential challenges.
- Data-Driven Insights: Utilize current and historical data to help track project performance which enables continuous improvement and alignment with overall business goals.

**Aimee Rodrigues**, VP of Life Sciences, **Planisware**

**Moussa Gherbi**, VP of Customer Success, **Planisware**

10:00 **PANEL DISCUSSION: "DRIVING INNOVATION AND R&D PORTFOLIO MANAGEMENT ACROSS LIFE SCIENCES SECTORS"**

This engaging panel discussion will bring together representatives from the pharmaceutical, biotech, medtech, and diagnostics sectors to explore how strategic R&D portfolio management drives innovation and addresses industry-specific challenges. Each panelist will share their insights and experiences on optimizing R&D portfolios to foster innovation, enhance efficiency, and achieve strategic alignment.

- How strategic portfolio management helps navigate regulatory complexities, manage R&D costs, and stay competitive.
- Insights on managing scientific uncertainty, securing funding, and balancing innovation with regulatory requirements.
- Strategies to accelerate product development cycles, maintain quality standards, and integrate digital health technologies.
- The role of portfolio management in staying ahead of technological advancements, navigating regulatory pathways, and integrating diagnostic data.

**Aimee Rodrigues**, VP of Life Sciences, **Planisware**

**Ching Chang**, VP, Portfolio Strategy & Program Management, **Avidity BioSciences**

**Tim Rumbaugh**, VP, THV Program Management, **Edwards Lifesciences**

**Maria Bagniewska**, Senior Director, Head of Portfolio and Operations, **gRED Computational Sciences**, **Genentech**

10:30 Networking Coffee Break

11:00 **PORTFOLIO FIXES: ADDRESSING KEY PAIN POINTS IN PORTFOLIO MANAGEMENT WITH AI AND ADVANCED MODELING**

Project Portfolio Management faces challenges like project dependencies, shifting markets, and opaque models. This session highlights common pain points and how our tools and methods are evolving to provide AI-driven solutions that improve transparency, manage risks, and drive better decisions.

- Tackling Complexity: Address hidden risks and project dependencies.
- Model Transparency: Clarify assumptions and improve stakeholder trust.
- AI-Driven Insights: Leverage AI tools for smarter portfolio decisions.
- Strategy to Execution: Bridge long-term planning with real-time project adjustments.

**Magnus Ytterstad**, Head of Customer Success & Portfolio Analytics, **Captario**

# Day 1

## 11:30 **PANEL DISCUSSION: "PRIORITIZATION AND SELECTION OF PROJECTS ACROSS LIFE SCIENCES SECTORS"**

This dynamic panel discussion will feature representatives from the pharmaceutical, biotech, medtech, and diagnostics sectors, focusing on how each sector approaches the prioritization and selection of projects. The panelists will share their strategies for evaluating and selecting high-value projects, balancing short-term wins with long-term goals, and aligning projects with organizational strategies.

- **Criteria for Project Evaluation:** Discussing the criteria used to evaluate and prioritize projects based on strategic goals and potential impact.
- **Balancing Short-Term and Long-Term Goals:** Strategies for maintaining a balanced portfolio that includes both quick wins and long-term initiatives.
- **Resource Allocation:** Techniques for effective resource allocation to ensure high-priority projects receive the necessary support.
- **Decision-Making Frameworks:** Insights into the decision-making frameworks used to select the most valuable projects.
- **Case Studies:** Real-world examples from each sector showcasing successful project prioritization and selection practices.

**Lindsay Darling**, Director, Companion Diagnostics Portfolio Management & Operations, **Regeneron**

**Hannah Klaeser**, Associate Director, Portfolio Planning, **Ionis Pharmaceuticals**

**Rich Hanser**, Principal, **DTR Consulting**

**Ernest Chow**, Senior Director, Portfolio Strategy, **Avidity Biosciences**

## 12:00 **INTEGRATION PATH: TRENDS IN DRUG DISCOVERY & THEIR EFFECTS ON PPM**

Technologies like AI, DNA Encoded Libraries (DEL) and new modalities like Targeted Protein Degraders (TPDs), Multispecific Antibodies, ADCs and Cell & Gene Therapies continue to play an outsized role in increasing the numbers of drug discovery & development programs in pipelines. Even in financially challenging circumstances, these technologies are often viewed as a means of reducing the risk, expense and timelines for drug discovery programs. In this session, we'll look at the latest trends, and review a case study that demonstrates how these trends affect the way in which we plan, manage & execute drug discovery programs. Attendees will leave with actionable insights to overcome common challenges and accelerate their path to success.

Key Takeaways:

- **Identify The Technologies and Trends** driving drug discovery operations and how they affect project & portfolio planning
- **Identify Operational Gaps:** Understand the common pitfalls in drug discovery workflows, their impact on timelines and outcomes, and
- **Optimizing Resource Utilization:** Learn strategies to allocate resources effectively and improve cross-team collaboration.
- **Streamlining Workflows:** Explore practical tools and methods to enhance process continuity between research and development phases.
- **Driving Alignment:** Discover how harmonized processes can improve decision-making and accelerate progress across portfolios.

**Mark Fortner**, Founder & CEO, **Aspen Biosciences**

## 12:30 Networking Lunch

## 13:30 **CASE STUDY: "ESTABLISHING EFFECTIVE GOVERNANCE FRAMEWORKS IN LIFE SCIENCES"**

This presentation will delve into the importance of establishing robust governance frameworks within life sciences organizations. It will cover best practices for setting up governance structures that ensure oversight, accountability, and strategic alignment.

- **Defining Governance Structures:** Setting up frameworks to ensure oversight, accountability, and alignment with strategic goals.
- **Best Practices:** Proven methods for implementing effective governance frameworks tailored to life sciences.
- **Role of Leadership:** How leadership drives governance and fosters a culture of accountability and strategic focus.

**Joe Stalder**, Vice President, Program Management, **Zentalis Pharmaceuticals**

## 14:00 **PRESENTATION: "OPTIMIZING DECISION-MAKING PROCESSES IN LIFE SCIENCES PROJECTS"**

This presentation will explore structured decision-making models that enhance project outcomes in the life sciences sector. It will cover various frameworks and tools that ensure informed, timely, and strategic project decisions.

- **Decision-Making Models:** Implementing structured models like RACI and Decision Matrix to enhance decision-making.
- **Case Studies and Best Practices:** Real-world examples of effective decision-making processes and insights from successful implementations.
- **Tools and Technologies:** Leveraging software tools that support decision-making processes, including demonstrations of key features and benefits.

**Ruben Abagyan**, Professor, **University of California San Diego**

## 14:30 **PANEL DISCUSSION: "ENHANCING GOVERNANCE AND DECISION-MAKING PROCESSES IN LIFE SCIENCES"**

This discussion will bring together representatives from the pharmaceutical, biotech, medtech, and diagnostics sectors to explore the critical role of governance and decision-making processes in managing life sciences projects. The panelists will share their insights and experiences on establishing effective governance frameworks, implementing decision-making models, and the role of leadership in ensuring successful project outcomes.

- **Establishing Governance Frameworks:** Discussing best practices for setting up governance structures that ensure oversight, accountability, and strategic alignment.
- **Decision-Making Models:** Exploring structured decision-making models such as RACI and Decision Matrix to ensure informed and timely decisions.
- **Leadership's Role:** Highlighting how leadership drives effective governance and decision-making processes, fostering a culture of accountability.
- **Case Studies:** Sharing real-world examples of successful governance and decision-making implementations across different life sciences sectors.
- **Tools and Technologies:** Discussing software tools that support governance and decision-making processes, and their impact on project outcomes.

**Sarah Hudson**, Executive Director, Portfolio Strategy and Program Management, **Avidity Biosciences**

**Madhavi Pokkuluri**, Head of Released Product and Process Excellence, **BD**

**Natalie Rossignol**, Vice President, Project, Portfolio and Alliance Management, **Crinetics Pharmaceuticals**

**Kristen Black Villanueva**, Director of Program Management, **Neurocrine Biosciences**

# Day 1

- 
- 15:00 Networking Coffee Break
- 15:30 **WORKSHOPS: METHODOLOGIES IN LIFESCIENCES PROJECT MANAGEMENT**  
(Refer to the workshop list in the next page)
- 16:30 **ROUNDTABLE DISCUSSIONS: EMPOWERING PORTFOLIO MANAGEMENT WITH INSIGHTS AND EFFICIENCY**  
(Refer to the topic list in the next page)
- 
- 17:00 Closing Remark
- 
- 17:05 Networking Cocktail Reception
- 
- 18:00 End of Day 1
- 

## WORKSHOPS:

### A. LEAN SIX SIGMA FOR OPERATIONAL EXCELLENCE IN LIFE SCIENCES

Discover how Lean Six Sigma can streamline your operations, reduce waste, and enhance quality in manufacturing, labs, and clinical operations. This workshop will focus on practical applications and case studies.

**Kristen Black Villanueva**, Director of Program Management, **Neurocrine Biosciences**

### B. DESIGN THINKING FOR PROCESS & PROJECT INNOVATION

Explore the power of Design Thinking to create process and project solutions to support your innovation focus and inevitably benefit the patient. With hands-on exercises, this workshop will guide you through how to apply Design Thinking in a new way.

**Tim Rumbaugh**, VP, THV Program Management, **Edwards Lifesciences**

### C. QUALITY BY DESIGN: A FRAMEWORK FOR INSTILLING EXCELLENCE IN ORGANIZATIONS AND PROJECTS

Gain a deeper understanding of Quality by Design (QbD) as a comprehensive framework to embed quality into every aspect of your organization. This workshop will focus on implementing and sustaining a quality management system (QMS) while ensuring continuous improvement in quality-focused projects. Designed for life sciences professionals, the session will provide practical strategies and tools to instill a culture of quality in manufacturing, regulatory processes, and beyond.

**Michael Delitala**, Founder, **Delitala Quality Consulting & Author Corporation**

### D. OBEYA FOR COLLABORATIVE PROJECT MANAGEMENT IN LIFE SCIENCES

Learn how to set up and use an Obeya (big room) for effective cross-functional collaboration and real-time problem solving in large-scale projects. This workshop will offer practical insights and exercises.

**Madhavi Pokkuluri**, Head of Released Product and Process Excellence, **BD**

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## Roundtable Discussions

### A. PPM TOOLS & TECHNOLOGY: EXPLORING THE LATEST TOOLS FOR SMARTER PORTFOLIO MANAGEMENT

**Elise Mascaret**, Account Director, **Planisware**

### B. DATA-DRIVEN DECISION MAKING & SCENARIO PLANNING: USING ANALYTICS FOR INFORMED DECISIONS

**Magnus Ytterstad**, Head of Customer Success & Portfolio Analytics, **Captario**

### C. RESOURCE MANAGEMENT & OPTIMIZATION: ALLOCATING RESOURCES EFFICIENTLY ACROSS PORTFOLIOS

**Jacob Cancelliere**, VP, Account Enablement, **Rego Consulting**

### D. PROGRAM AND PORTFOLIO PRIORITIZATION: BALANCING COMPETING PRIORITIES WITH STRATEGIC ALIGNMENT

**Katie McGohan**, Director CMC Program Management, **Regeneron**

### E. CROSS-FUNCTIONAL COLLABORATION: BREAKING SILOS AND FOSTERING STRONGER INTERNAL ALIGNMENT

**Heather Gouvis**, Executive Director, Project Leadership and Alliance Management, **xencor**

# Day 2

8:35 Chairman's Remarks

**Joe Stalder**, Vice President, Program Management, **Zentalis Pharmaceuticals**

8:45 **KEYNOTE:** HOW FAST DOES YOUR ORGANIZATION GROW DRUG HUNTERS?

If unfamiliar with the Drug Hunting or the Drug Hunter concept, this is a Leader that works as a part of a multi-disciplinary professional team working to discover and develop new drugs. Often, on-the-job training for professional project managers leans into topics like cross-functional team leadership, influencing without authority, next level communication skills & executive presence to name a few. How are you personally working to augment your own drug discovery and development and commercialization know-how OR that of your team? The hope with this presentation is to stimulate a little more end-in-mind focus to accelerate putting you and our top talent in a position of being credible & influential cross-functional leaders.

**Michael Myers**, Associate Vice President - Lilly Research Labs, *Due Diligence*, **Eli Lilly**

9:30 **PANEL DISCUSSION:** "OPTIMIZING RESOURCE ALLOCATION IN LIFE SCIENCES PROJECTS"

This engaging panel discussion will bring together representatives from the pharmaceutical, biotech, medtech, and diagnostics sectors to explore strategies for optimizing resource allocation and management. The panelists will share their insights and experiences on effective resource management, overcoming resource constraints, and maximizing productivity in life sciences projects.

- Effective Resource Management: Discussing techniques for identifying and prioritizing resource needs across multiple projects.
- Dynamic Resource Allocation: Exploring methods for real-time resource allocation to maximize productivity and efficiency.
- Addressing Resource Constraints: Sharing solutions for overcoming resource limitations and ensuring smooth project execution.
- Tools for Resource Management: Discussing software tools and technologies that facilitate effective resource tracking and management.
- Case Studies: Real-world examples of successful resource allocation and optimization strategies from leading life sciences organizations.

**Martin Brum**, Director, Program Management, **Illumina**

**Rich Hanser**, Principal, **DTR Consulting**

**Kathryn O'Neill**, Director, Portfolio & Strategic Operations Lead, **Bristol Myers Squibb**

10:00 Networking Coffee Break

10:30 **DECODING 2025:** THE PPM TRENDS NO ONE IS TALKING ABOUT—YET

Each year, Rego Consulting works with hundreds of organizations to address the complexities of PPM implementations, upgrades, training, and organizational change. Leveraging insights from over 250 consultants, the company identifies key trends and emerging themes shaping the future of project and portfolio management. These findings are compiled into Rego's annual PPM Trends report, designed to help organizations navigate what's ahead.

In this session, Rego's senior architects will present the top PPM trends for 2025, offering a comprehensive

analysis of the evolving landscape. Attendees will gain valuable insights into the future of PPM, along with practical strategies to help their organizations adapt and thrive.

**Jacob Cancelliere**, VP, Account Enablement, **Rego Consulting**

**Wes McCoubrie**, VP, Delivery, **Rego Consulting**

11:00 **LEADING WITH PURPOSE:** CAN LEADERSHIP CULTURE UNLOCK THE FULL POTENTIAL OF LIFE SCIENCES?

Join Nasim Sheida Boggs for an intimate and inspiring conversation about the critical role of leadership in shaping organizational culture and driving innovation in Project, Program, and Portfolio Management (PPM). Discover actionable insights and personal experiences that highlight how strong leadership can unlock the full potential of teams, break down barriers to innovation, and create a culture of excellence in life sciences.

Key Takeaways:

- The role of leadership in fostering a culture of trust, collaboration, and innovation within PPM teams.
- Practical strategies to inspire and empower teams to enhance project delivery and performance.
- Insights into overcoming challenges and adapting to change in dynamic industries through effective portfolio management.
- Lessons from Nasim's personal leadership journey and her impact in life sciences and large-scale projects.
- How to align organizational culture with PPM goals to fuel sustainable innovation and successful outcomes.

This session promises to be a thought-provoking exploration of leadership excellence, filled with authentic stories, practical wisdom, and strategies for optimizing project success.

**Nasim Sheida Boggs**, Vice President, TMTT Program Management Office, **Edward Lifesciences**

11:30 **PANEL DISCUSSION:** "MAXIMIZING PROJECT SUCCESS THROUGH PERFORMANCE MEASUREMENT AND KPIS IN LIFE SCIENCES"

This panel discussion will bring together representatives from the pharmaceutical, biotech, medtech, and diagnostics sectors to explore the importance of performance measurement and key performance indicators (KPIs) in managing life sciences projects. The panelists will share their insights and experiences on identifying relevant KPIs, leveraging data analytics, and integrating performance measurement with decision-making processes.

- Identifying Relevant KPIs: Discussing techniques for selecting KPIs that align with project and organizational goals.
- Real-Time Performance Tracking: Exploring methods for monitoring KPIs in real-time to provide actionable insights.
- Using Data Analytics for Improvement: Sharing how data analytics tools are used to analyze performance data and identify areas for improvement.
- Integrating Performance Measurement with Decision-Making: Discussing approaches for incorporating performance measurement into decision-making processes.
- Case Studies: Real-world examples of successful performance measurement and KPI tracking from leading life sciences organizations.

Carl Finamore, Executive Director, Program Management, **Ultragenyx Pharmaceuticals**

**Kathryn O'Neill**, Director, Portfolio & Strategic Operations Lead, **Bristol Myers Squibb**

**Rohit Chawla**, Vice President, Head of Program Management, **BridgeBio**

12:00 Networking Lunch

# Day2

## 13:00 **PANEL DISCUSSION: LEVERAGING TECHNOLOGY AND TOOLS FOR STRATEGIC PORTFOLIO MANAGEMENT IN LIFE SCIENCES**

This discussion will bring together representatives from the pharmaceutical, biotech, medtech, and diagnostics sectors to explore the role of technology and tools in enhancing strategic portfolio management (SPM). The panelists will share their insights and experiences on using advanced tools for project management, resource allocation, and performance tracking.

- **Effective Project Management Tools:** Discussing the key features and benefits of project management tools that help in planning, executing, and monitoring projects.
- **Optimizing Resource Allocation:** Exploring tools that optimize resource allocation and manage constraints to maximize productivity.
- **Performance Tracking and KPIs:** Highlighting the capabilities of tools for tracking KPIs and performance metrics, and generating actionable insights.
- **Integration with Existing Systems:** Sharing best practices for integrating new SPM tools with existing organizational systems and workflows.
- **Case Studies:** Real-world examples of successful technology and tool implementations in life sciences organizations.

**Noel Sobelman**, Partner, **Accel Management Group**

**Joe Stalder**, Vice President, Program Management, **Zentalis Pharmaceuticals**

**Ernest Chow**, Senior Director, Portfolio Strategy, **Avidity Biosciences**

## 13:30 **CASE STUDY: OPTIMIZING RESOURCE ALLOCATION AND PERFORMANCE TRACKING WITH SPM TOOLS**

This presentation will explore tools that optimize resource allocation and performance tracking in strategic portfolio management (SPM) for life sciences projects. It will highlight the benefits of these tools, provide best practices for integration, and share real-world case studies.

- **Resource Allocation Tools:** Benefits and features of tools that optimize resource allocation and manage constraints.
- **Performance Tracking Tools:** Capabilities for tracking KPIs, performance metrics, and generating actionable insights.
- **Integration with Existing Systems:** Best practices for integrating new SPM tools with existing organizational systems.
- **Case Studies:** Insights from successful implementations of resource allocation and performance tracking tools in life sciences.

**Ching Chang**, VP, Portfolio Strategy & Program Management, **Avidity BioSciences**

## 14:00 **CASE STUDY: HARNESSING PROJECT MANAGEMENT TOOLS FOR STRATEGIC PORTFOLIO MANAGEMENT IN LIFE SCIENCES**

This presentation will focus on the essential project management tools that enhance strategic portfolio management (SPM) in life sciences projects. It will cover the key features and benefits of these tools and demonstrate how they improve project planning, execution, and monitoring.

- **Overview of Project Management Tools:** Introduction to essential tools used for effective project management.
- **Key Features and Benefits:** Detailed look at the features that help in planning, executing, and monitoring projects.

- **Live Demonstrations:** Demonstrations of popular project management tools like Clarity, Rally, and Microsoft Project.
- **Case Studies:** Real-world examples of successful project management tool implementations in life sciences.

**Madhavi Pokkuluri**, Head of Released Product and Process Excellence, **BD**

## 14:30 Networking Coffee Break

## 15:00 **ROUNDTABLE DISCUSSIONS** (Refer to the topic list in the next page)

## 15:45 Closing Remarks

## 16:00 End of the Conference

## ROUNDTABLES

### **A: PHARMA AND BIOTECH PARTNERSHIPS**

Unlock the potential of synergy between pharmaceutical and biotech companies in our focused roundtable discussion on partnerships in product development. This session will explore how collaborative efforts can drive innovation, improve patient outcomes, and accelerate the time-to-market for new therapies.

#### **1. DRUG DEVELOPMENT COLLABORATION:**

- Explore partnerships between biotech and pharma to combine innovative research with clinical and regulatory expertise, highlighting case studies of successful collaborations that advanced new therapies to market.

#### **2. TECHNOLOGY TRANSFER:**

- Discuss licensing opportunities for biotech innovations like gene editing and mRNA technology, focusing on best practices for effective collaboration and commercialization.

#### **3. SHARED R&D RESOURCES:**

- Examine joint research initiatives leveraging shared expertise and resources to enhance treatments, improve funding efficiency, and accelerate innovation.

**Michael Myers**, Associate Vice President - Lilly Research Labs, *Due Diligence*, **Eli Lilly**

# Day2

## **B: PHARMA AND DIAGNOSTICS PARTNERSHIPS**

Join us for an insightful discussion on the transformative impact of diagnostics in the pharmaceutical industry. Learn how collaborative efforts can drive personalized medicine, enhance clinical trials, and accelerate drug development.

### **1. COMPANION DIAGNOSTICS:**

- Develop diagnostics that predict patient response to specific drugs.
- Enhance personalized treatment approaches through collaborative innovation.

### **2. BIOMARKER DISCOVERY:**

- Collaborate on identifying and validating biomarkers for diagnostic tests and targeted therapies.
- Case studies of successful biomarker collaborations.

### **3. CLINICAL TRIAL SUPPORT:**

- Utilize diagnostic tests to stratify patients and monitor treatment responses.
- Improve clinical trial efficiency and outcomes through integrated diagnostics.

**Lindsay Darling**, *Director, Companion Diagnostics Portfolio Management & Operations, Regeneron*

## **C: ARTIFICIAL INTELLIGENCE IN PPM: LEVERAGING AI FOR SMARTER DECISIONS AND PORTFOLIO OPTIMIZATION**

Join us for an engaging roundtable discussion exploring the transformative potential of Artificial Intelligence (AI) in Project, Program, and Portfolio Management (PPM). Discover how innovative AI-driven tools and strategies can revolutionize decision-making, enhance portfolio optimization, and deliver value in a competitive and rapidly evolving landscape.

Key topics include:

### **1. AI-DRIVEN DECISION SUPPORT:**

- Harness predictive analytics to inform strategic decisions.
- Improve resource allocation and risk management through AI-enhanced insights.
- Case studies highlighting the successful integration of AI into PPM workflows.

### **2. PORTFOLIO OPTIMIZATION:**

- Leverage AI to identify high-impact projects and streamline portfolios.
- Explore how machine learning models can predict project outcomes and prioritize investments.
- Real-world examples of portfolio transformation using AI.

### **3. ENHANCING EFFICIENCY AND COLLABORATION:**

- Use AI to foster cross-functional collaboration and streamline communication.
- Automate routine tasks to free up time for innovation and strategic focus.
- AI's role in facilitating seamless integration of data across programs and portfolios.

**Wes McCoubrie**, *VP, Delivery, Rego Consulting*

## **D: GOVERNANCE EXCELLENCE: ENHANCING ACCOUNTABILITY THROUGH ROBUST GOVERNANCE**

Are you ready to explore the art of governance while having some fun? Join us for a lively roundtable discussion where we'll break down the essentials of robust governance, discover its impact on accountability, and learn how it powers successful project delivery.

Here's what's on the agenda:

- What is governance? Let's define it in practical terms.
- Key components and benefits of effective governance structures.
- How to implement governance that sticks and delivers results.
- Accountability games, including "Hot Potato" and the "Blame Game," to uncover real-life dynamics in a playful way.

This session features expert insights, engaging conversations, and interactive activities designed to inspire and equip you with strategies to enhance governance in your teams and projects.

Whether you're a governance pro or just starting to explore this critical topic, you'll leave with fresh ideas, practical tips, and a new appreciation for governance as a driver of success. Don't miss this opportunity to connect, learn, and have some fun along the way!

**Rohit Chawla**, *Vice President, Head of Program Management, BridgeBio*

## **E: ACCELERATING DRUG DISCOVERY WITH INTEGRATED PROGRAM MANAGEMENT SOLUTIONS**

Explore how integrated tools can streamline planning, management, and execution across the drug discovery process, allowing for faster progression of programs from discovery to clinical trials.

Here's what's on the agenda:

- How does research project management differ from development project management?
- What are the keys to successful implementation of research PM practices?
- How do you align research and development teams and set them up for a successful handoff?
- What tools and technologies can make research projects more capital and time efficient, improve communication & alignment,

This session offers participants the opportunity to share their real experiences, challenges, and exchange best practices. It will be an intimate, collaborative space for open dialogue and learning among peers.

**Mark Fortner**, *Founder & CEO, Aspen Biosciences*

# 2025 PPM Summits Worldwide

- 1** 22 - 23 January, BARCELONA  
28<sup>th</sup> European Pharma and Biotech Project, Program and Portfolio Management Conference
- 2** 29 - 30 January, SAN DIEGO  
American Strategic Portfolio Management in Life Sciences – West Coast
- 3** 3 - 4 April, BASEL  
29<sup>th</sup> European Biopharma Project Program and Portfolio Management Conference
- 4** 9 - 10 April, CHICAGO  
2<sup>nd</sup> American Medical Device Project & Portfolio Management Conference
- 5** 15 - 16 April, PHILADELPHIA  
24<sup>th</sup> American Pharma and Biotech Project, Program and Portfolio Management Conference
- 6** 14 - 15 May, LONDON  
European Strategic Portfolio Management in Life Sciences
- 7** 3 - 4 June, COPENHAGEN  
Biopharma PPM in Clinical Research and Development Summit Edition
- 8** 11 - 12 June, BERLIN  
2<sup>nd</sup> European MedTech Summit 2025 - Medical Device Project & Portfolio Management Conference
- 9** 11 - 12 June, SAN FRANCISCO  
25<sup>th</sup> American Pharma and Biotech Project, Program and Portfolio Management Conference
- 10** 5 - 6 August, SINGAPORE  
Asian Pharma and Biotech Project, Program and Portfolio Management Conference
- 11** 3 - 4 September, MELBOURNE  
Pharma and Biotech Project, Program and Portfolio Management Conference
- 12** 10 - 11 September, MUMBAI  
3<sup>rd</sup> Strategic Project, Program and Portfolio Management Conference for Pharmaceuticals
- 13** 8 - 9 October, BASEL  
30<sup>th</sup> European Pharma and Biotech Project, Program and Portfolio Management Conference
- 14** 15 - 17 October, BOSTON  
26<sup>th</sup> American Pharma and Biotech Project, Program and Portfolio Management Conference
- 15** 22 - 23 October, LONDON  
31<sup>st</sup> European Pharma and Biotech Project, Program and Portfolio Management Conference
- 16** 9 - 11 December, LAS VEGAS  
2<sup>nd</sup> Annual PPM TOOLBOX SUMMIT

# Our Partners



# Sponsorship



Additional sponsorship opportunities are available for those who wish to further customize their involvement.

## Exhibiting

With a large and senior audience and decision makers, thoroughly selected, exhibiting at any Summit at 2025 PPM SUMMIT WORLD is a popular sponsorship option with great value for solution providers.

Sponsorship includes:

- Selected Summit Three Access Passes
- Exhibition space
- Helping to prearrange face to face meetings with selected participants

## Dinner Sponsorship

2025 PPM SUMMIT WORLD TOUR will host a series of dinners. These dinners bring together thoughtfully selected groups of 15-20 peers from established pharma, biotech, healthcare, and medtech companies. The dines start with a 30 minute networking reception followed by a 60 minute seated dinner, with the option for participants to remain afterward to continue networking.

- Selected Summit Three Access Passes
- 30-minute reception, and 60 minute seated dinner

## Speaking

Limited speaking opportunities are available for our sponsoring partners to demonstrate the expertise of their organization. Be sure to ask about these early so we can ensure your presentation flows seamlessly with the overall content. Speaking sponsorships has several options – keynote presentations, case study presentations, expert presentations, panel discussions, workshops or roundtable leadership. Speaking opportunities are available for experts in the field of Project and Portfolio Management, Contract Management, Consultancy, CMO, CRO, Data Management and Intelligence, Artificial Intelligence, Robotics, IoT and Digital Innovations.

# Contact us

Updated: 23 January, 2025  
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**VICE PRESIDENT, PPM WORLD TOUR:**

**Liza Zhaivoronok**

[liza.zhaivoronok@whysummits.com](mailto:liza.zhaivoronok@whysummits.com)

**SPEAKING:**

**Jenn See**

[jenn.see@whysummits.com](mailto:jenn.see@whysummits.com)



**ATTENDING AND SPONSORING:**

**Srihari Kamban**

[shk@whysummits.com](mailto:shk@whysummits.com)



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