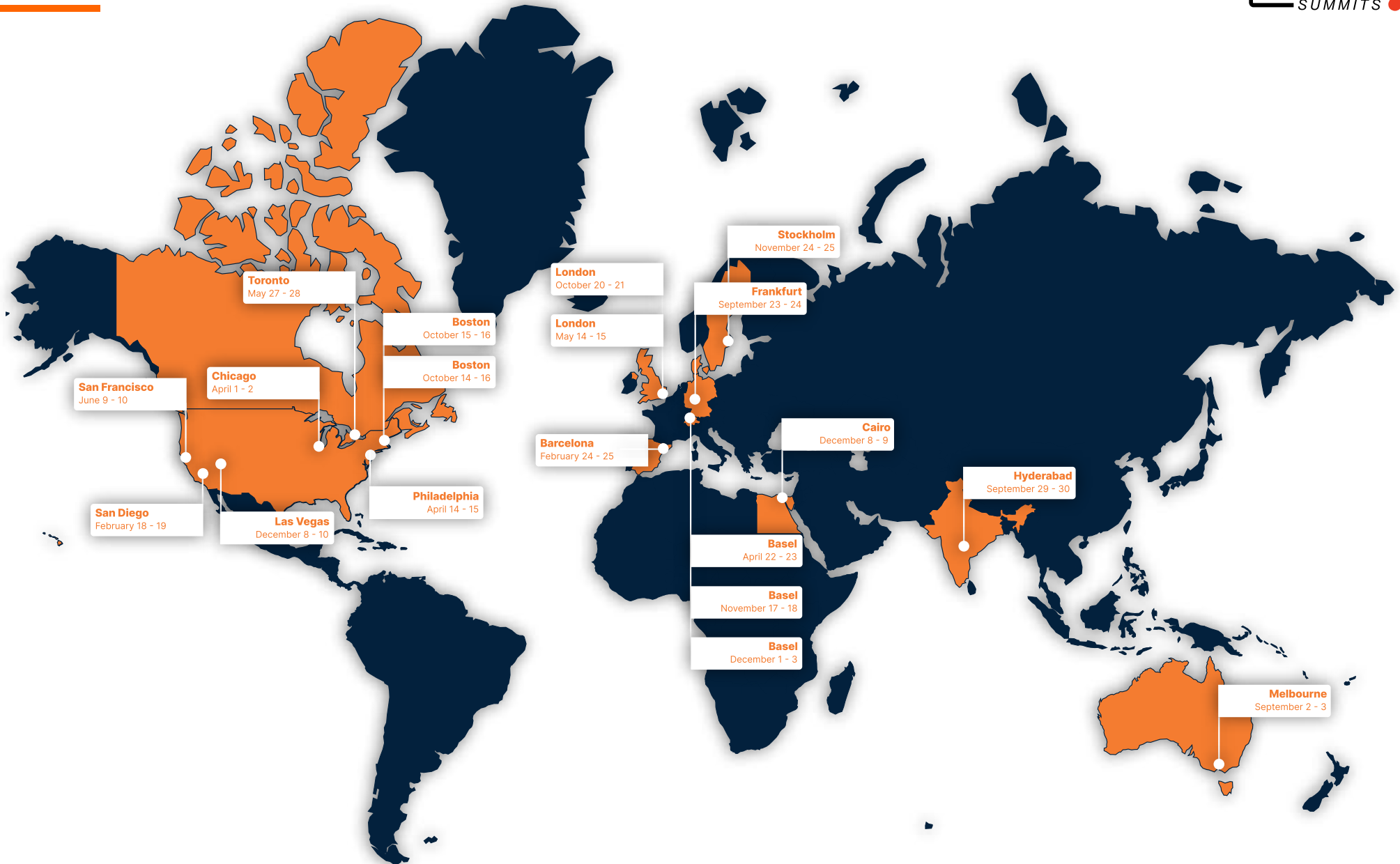




# PPM WORLD TOUR 2026



# WHAT TO EXPECT

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## **AN ULTIMATE PLAYBOOK FROM FIRST SPARK TO PATIENT IMPACT**

We didn't assemble a conference. We started with a harder question: How do you run a biotech portfolio from the first spark of an idea all the way to real patient benefit, without wasting time, money, or people? That question became this story.

Shaped by seasoned pharma experts and the stakeholders who power the West Coast pharma & biotech ecosystem; PMOs and portfolio leaders, clinicians, CMC and quality, regulatory and access teams, CDMOs and CROs, payers, and investors, this is a step-by-step playbook. Not theory, not theater. You'll see how the ecosystem moves from intake to impact with a repeatable rhythm: a one-page charter that sharpens focus, strict limits on work-in-progress, transparent scoring that draws the cutline, staged funding that follows evidence, capacity planned around real bottlenecks, alliances with decision rights, AI as a helper, not the boss, and a dashboard that forces honest trade-offs.

The result? Faster, cleaner decisions. Money and people used where they matter. Launches that stick.

If you've ever thought, "There has to be a better way", pull up a chair. The story starts with an idea intake and ends with patients writing back.

# WHAT WILL BE DISCUSSED?



## MASTER THE SKILLS

- ✦ Turn projects into a strategic portfolio with clear prioritization and confident kill decisions.
- ✦ Balance labs, CROs, and internal teams with practical resource & capacity tools.
- ✦ Use value/risk models that drive real funding decisions—not just slides.
- ✦ Prove ROI with simple, lasting benefit-realization methods.
- ✦ Stress-test budgets and timelines with fast scenario planning.
- ✦ Apply AI for forecasting, risk sensing, and smarter decision-making.
- ✦ Streamline governance with lean, decisive steering structures.
- ✦ Lead teams from “project thinking” to true “portfolio thinking.”
- ✦ Build portfolios that hold up in regulatory and quality inspections.
- ✦ Make vendor/CRO strategy a proactive part of your portfolio.

## PUT STRATEGY INTO ACTION

- ✦ **Live portfolio challenge:** Re-prioritize a realistic pharma pipeline under shifting constraints.
- ✦ **Tool showdown & hands-on lab:** Compare leading PPM platforms side-by-side, guided by power users.
- ✦ **Scorecard clinic:** Walk out with a one-page portfolio scorecard aligned to strategy.
- ✦ **Risk heatmap sprint:** Build a cross-program risk view your executives will actually use

## TAKE HOME REAL IMPACT

- ✦ **Executive-ready templates:** Prioritization matrix, governance cadence, benefits tracker, and stage-gate checklist.
- ✦ **Benchmark pack:** Explore how top biopharma PMOs operate, from staffing to tools to reporting, and use it to elevate your own PMO.
- ✦ **Peer network:** Personal introductions to PMO leaders who are tackling the same portfolio pressures.

# TESTIMONIALS



“

Thanks so much for organizing and for the super talented speakers! Fantastic event.

★★★★★



**Alejandro Martorell Riera**  
Senior Project Manager/Leader  
Kite Pharma, USA

“

Reflecting on my journey at Edwards and in the industry, I'm grateful for the opportunity to lead with purpose and passion. Empowering teams, fostering collaboration, and putting others first have been key principles throughout my career. A special thank you to WHY Summits for the opportunity to share my journey. I'm excited to continue shaping a future where leadership is driven by purpose and positive impact.

★★★★★



**Nasim (Sheida) Boggs**  
Vice President, TMTT Program  
Management Office  
Edwards Lifesciences

“

Thanks so much for inviting me. I had a fantastic time with the really interactive and enthusiastic attendees who came to my workshop!!

★★★★★



**Michelle Bridenbaker**  
Global Medical Information Lead  
Recordati

“

Why Summits brings together some of the most respected thought leaders in Portfolio Management in the BioPharma industry. Whether you're a novice or seasoned leader in this discipline, there are always nuggets to be found in a presentation, panel, or roundtable discussion. If you're striving to build or improve your capabilities in Portfolio Management, the Why Summits events are the places to be.

★★★★★



**Richard Bayney**  
President & Founder, Portfolio Manager &  
Decision Analyst  
PPVC

“

Thank you to Why Summits for the opportunity to discuss key PPM trends impacting the digital workplace and remote teams. I shared insights on the rise in remote work, the demand for emotionally intelligent leaders, the importance of possessing soft skills, and raising awareness on mental health. I hope my recommendations resonate with you on your journey to becoming a transformative digital leader: - Adopt a digital-first mindset, - Challenge your assumptions, - Recognize and conquer biases, - Lead with trust, compassion, stability, and hope

★★★★★



**Stephen Smith**  
Senior Program Director, Oncology/Senior  
Program Director, Oncology  
Corcept Therapeutics

“

Thank you Why Summits for the opportunity to participate on this panel! It's always a pleasure to hear experiences and learnings from peers and think about how we can use them to introduce best practices across the industry.

★★★★★



**Emily Ziedman**  
Senior Director  
Karyopharm Therapeutics

“

Put on by Why Summits in San Francisco, this was an awesome opportunity to speak to a pharmaceutical / biotech audience. The top reason for anyone to attend a conference is to meet new people, understand how your work lives differ & intersect, and applying what you learn from everyone's experience & expertise. And as a speaker, I also get a great big dose of clarity on how I can improve next time.

★★★★★



**Tim Rumbaugh**  
Vice President, Program Management  
Edwards Lifesciences

“

We were proud to be Sponsors for the 31<sup>st</sup> European Life Sciences Project & Portfolio Management Conference in London. Two really energizing days of learning and connection. Huge thanks to Why Summits for such a well-run event. The presentations, panels and workshops sparked great conversations around portfolio strategy, governance, risk and innovation across the sector. Most of all, it was fantastic to reconnect with familiar faces and meet new Life Sciences leaders who share the same passion for PPM.

★★★★★



**Merryn Horneman**  
Life Sciences Delivery Partner  
Mi-GSO-PCUBED

“

My personal thanks to everybody enabling this great discussion! I was especially delighted to touch the diversity of the clinical trials data.

★★★★★



**Guna Dansone**  
Head of Clinical research  
Alpha

“

An outstanding few days of industry relevant PPM topics, from the energetic and thoughtful speakers and panels to networking new relationships to insights into where the industry is going with AI! Huge chops to Why Summits? for putting on an engaging and professional event!

★★★★★



**Mike Fitzpatrick**  
Vice President of Business Development &  
Operations  
Umoja Biopharma

“

One of the things I really like about Why Summits is how intimate the conference is. You know there are a lots of other places that you can go to do talk about project management and portfolio management which I really love, you know a large global meetings like DIA, NF BIO, but there's nothing like the intimacy that Why Summits provides to us and being able to network with the small group of people. So that's one of the many reasons why I choose Why Summits.

★★★★★



**Ailsa Mendez-Fitzwilliam**  
Executive Director Biotech Portfolio Lead  
PPD

“

Thank you for the great conference, Why Summits!

★★★★★



**Daniel Smith**  
Vice President, Product Management  
Planview

# INDUSTRY PIONEERS ATTENDING FROM



GSK Pfizer Lilly MERCK Roche sanofi AstraZeneca

Bristol Myers Squibb EMD SERONO NOVARTIS abbvie Boehringer Ingelheim Johnson & Johnson

Edwards AMGEN VERTEX Genmab GILEAD Takeda novo nordisk

BAYER teva Biogen Daiichi-Sankyo CSL Otsuka Adaptimmune

Mylan astellas VIATRIS SANDOZ BIONTECH moderna

# OUR SPEAKERS



IN THE CHAIR, DAY 1



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



IN THE CHAIR, DAY 2



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



**Marie Spark**  
PM Educational Consultant  
**PMI San Francisco**



**Mohan Vemulapalli**  
Job Search Program Lead  
**PMI San Francisco**



**Dominique A. Kagele**  
Portfolio Strategy & Management  
**Genentech**



**Gilbert Hausmann**  
Director Program Management  
**Alamar Biosciences, Inc.**



**Vicki Mullen**  
Director, Enterprise Portfolio & Execution Leader  
**Terumo BCT**



**Christopher Warner**  
Associate Director of Commercial Operations Program Management  
**Gilead Sciences**



**Maya Thomas**  
Executive Director Program Management & Governance  
**Stanford Health Care**



**Andrea Espitia**  
Director Project Management  
**Synthego Corporation**



**Joseph Leonetti**  
Director, CMC Project Management  
**4D Molecular Therapeutics**



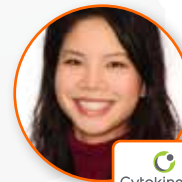
**Tim Rumbaugh**  
Vice President Program Management  
**Edwards Lifesciences**



**Laura Grebene**  
Vice President of Project Management  
**Roche Diagnostics Solutions**



**Neha Doshi**  
Associate Director (Portfolio Strategy & Analytics)  
**Gilead Sciences**



**Kim Tran**  
Director, Portfolio & Program Management,  
**Cytokinetics**



**Kathryn Davidson**  
Senior Director, Portfolio & Program Management  
**Cytokinetics**



**Rohit Chawla**  
Director, Global Program Management  
**Gilead Sciences**

# OUR SPEAKERS



**Robert Happy**

Life Sciences Managing Director  
**OnePlan**



**Jhonny Sasinouan**

Account Executive  
**OnePlan**



**Stephanie Ganey**

Director, Transformative Projects &  
PM Excellence  
**Sonic Healthcare**



**Marco Sorani**

Executive Director, Portfolio  
Strategy & Governance  
**BeOne Medicines**



**Jeffrey Wang**

Director, Portfolio Strategy  
**BeOne Medicines**



**Alyson Poston**

Chief Customer Success Officer  
**Rego Consulting**



**Ross Hensel**

Clarity PPM Consultant  
**Rego Consulting**



**Carrie Nauyalis**

Executive in Residence  
**Planview**



**Mei-Ling Shen**

Senior Director, Portfolio & Program  
Management, Hematology  
**BeOne Medicines**



**Yuyi Shen**

Vice President, Technical Operations and  
Supply Chain  
**Abcuro, Inc**



**Dhruvi Trivedi**

Associate Director, PMO  
**Veracyte, Inc.**



**Ashoka Rajendra**

Chief Executive Officer  
**Orchestra Bio**



**Megha Sinha**

Managing Partner & CEO  
**Kamet Consulting Group**



**Deepak  
Veeraraghavan**

Partner  
**Blue Matter**



**Jane Li**

Associate Director Project  
Management  
**Soleno Therapeutics, Inc.**



**Magnus Ytterstad**

Chief Product Owner  
**Captario**



**Lisa Wyatt**

TA Head, Global Program  
Management, Infectious Disease,  
Ophthalmology, and Immunology  
**Genentech**

5:30PM **MEET & GREET**

**GET A HEAD START ON NETWORKING!**

Join us for an informal **Meet & Greet** the evening before the conference officially begins. Pick up your badge and connect with fellow attendees, speakers, and partners in a relaxed setting.

8:00AM **REGISTRATION & WELCOME COFFEE**

8:30AM **CHAIRMAN'S OPENING ADDRESS**

8:35AM **START WITH A WHY? ICE-BREAKER SESSION**

**Meet Your Peers, Share Your Priorities, and Set Your Objectives**

A short, structured icebreaker designed to help delegates connect early, share their priorities, and start the conference with more relevant conversations.

- Why are you attending the conference?
- What are your main challenges?
- What do you want to learn about or take away?

8:45AM **KEYNOTE**

**AI in Drug Development Project Management: Next What's Changing Now and What's Next**

As AI tools enter project environments, teams are experimenting with new ways to support planning, reporting, risk awareness, and cross-functional coordination. This presentation explores real-world applications being tested today, common implementation challenges, and realistic expectations for how AI may reshape project management responsibilities and decision support in the near term.

**Joe Stalder**, Vice President Program Management, **Zentalis Pharmaceuticals**  
**Dave Penndorf**, PPM Advisor, **Groundswell Pharma Consulting, LLC**

9:30AM **CASE STUDY**

**Measuring What Matters Most: Building Metrics That Actually Drive Better R&D Portfolio Performance**

Many R&D organizations struggle to translate portfolio metrics into better decisions, improved throughput, and faster, more predictable delivery. The challenge is identifying which metrics truly drive strategy and measurable business outcomes.

- Connecting roadmaps and resource capacity, and determining which metrics will achieve strategic business objectives
- Establishing meaningful performance baselines, calculation methods, and governance practices
- Communicating priorities, dependencies, and trade-offs across complex product development environments



- Evolving metrics over time to support changing portfolio priorities, organizational maturity, and delivery models
- Real-world examples demonstrating how data-driven portfolio management and AI-enabled analysis improve throughput, predictability, and time-to-market outcomes

**Carrie Nauyalis**, Executive in Residence, **Planview**

10:00AM **PANEL DISCUSSION**

**How do PMOs Support the Decision Process for Project Initial Investment Commitments**

A candid, multi-perspective panel on the role that the PMO plays in driving portfolio decisions. Panelists from large and small biopharma, MedTech, and of varying stages of maturity will share their experience with establishing, scaling, and operating a PMO that supports portfolio decisions, including recommended practices and lessons learned.

- How does the PMO at your company support the decision-making process for project commitments (governance, information, checkpoint/ stage-gate definitions)?
- How does the data shape the decision process, and how is the PMO involved?
- Does a large company equate to a mature process?
- How often do you use seed funding, full-stage funding, and the LRP to shape a decision?

**Moderator: Joe Stalder**, Vice President Program Management, **Zentalis Pharmaceuticals**  
**Tim Rumbaugh**, Vice President Program Management, **Edwards Lifesciences**  
**Neha Doshi**, Associate Director (Portfolio Strategy & Analytics), **Gilead Sciences**  
**Jane Li**, Associate Director Project Management, **Soleno Therapeutics, Inc.**

10:30AM **MORNING COFFEE BREAK AND NETWORKING**

11:00AM **PANEL DISCUSSION**

**Portfolio Re-Prioritization Under Shifting Constraints: Making the Tough Calls in Public**

A debate on how portfolio leaders re-sequence work when budget, headcount, or policy shifts hit mid-cycle. Panelists compare real pivots, what criteria they used, how they handled capacity limits, and how they documented defensible decisions for SteerCo.

- Applying gate criteria and capacity/WIP limits when the plan breaks mid-quarter.
- Running fast, credible what-if scenarios (value at risk, probability of success, time at risk) to inform funding changes.

- Building a decision log that survives audit: options considered, thresholds, rationale, and owners.
- Crafting the reallocation narrative (e.g., 10-15 FTEs / \$ budget) with before-after value and risk.
- Handling friction: stakeholder pushback, CRO/lab constraints, and when to pause, accelerate, or kill.

**Moderator: Dave Penndorf**, *PPM Advisor, Groundswell Pharma Consulting, LLC.*

**Dominique A. Kagele**, *Portfolio Strategy & Management, Genentech*

**Rohit Chawla**, *Director, Global Program Management, Gilead Sciences*

**Laura Grebene**, *Vice President of Project Management, Roche Diagnostics Solutions*

## 11:30AM CASE STUDY

### A Journey to Project Portfolio Management Excellence

Too many organizations struggle to turn strategy into results, not from a lack of ideas, but from a lack of focus. This session explores how Project Portfolio Management helps leaders capture and prioritize the right work, plan with intention by thinking slow and acting fast, and enter a new era of strategic alignment. Attendees will leave with a clearer view of how disciplined portfolio practices drive value, speed execution, and connect projects directly to enterprise priorities.

**Stephanie Ganey**, *Director, Transformative Projects & PM Excellence, Sonic Healthcare*

## 12:00PM CASE STUDY

### Life Sciences Strategy to Execution: Driving Outcomes aligned with Strategic Imperatives Using OnePlan

This workshop focuses on a practical framework for translating strategy into execution within the life sciences industry, with a focus on driving measurable outcomes aligned with scientific, regulatory, and/or commercial imperatives. Life sciences organizations often face complex challenges in bridging long-term strategic goals - such as accelerating drug development, ensuring regulatory readiness, and expanding market access - with operational execution. By aligning portfolios, programs, and resources with these priorities, this approach helps teams stay focused, cross-functionally coordinated, and outcome-driven. The strategy emphasizes data-driven decision-making, transparency, and agility, enabling R&D, Technical Operations, and Commercial teams to deliver results that advance innovation and time to patient impact.

**Robert Happy**, *Life Sciences Managing Director, OnePlan*

**Jhonny Sasinouan**, *Account Executive, OnePlan*

## 12:30PM LUNCHEON

## 1:30PM KEYNOTE

### Together, We Can Enable Predictable Project Success

Discover a game-changing revelation: a single root cause lies at the heart of every single project failure in the world. Together, drawing upon the vast collective experience of our deep and global knowledge, let's look beyond the quick fixes and understand the true nature and humanity of project performance. Holding every stakeholder accountable, let's simplify the complex, and pioneer a universal mindset, system and practice that makes the impossible possible; a brilliant future of predictable project success.

## Learning Objectives

- Identification of the Core Issues: A newfound understanding of the factors contributing to project failure, enabling you to recognize and address them in your own projects.
- Empowerment through Collective Experience: By tapping into the collective experience, you will feel empowered to simplify complexities and collaboratively drive your projects towards success.
- Vision for a Brighter Future: Armed with insights and solutions, find inspiration to envision a future where project failure is virtually eliminated.

**Tim Rumbaugh**, *Vice President Program Management, Edwards Lifesciences*

## 2:00PM CASE STUDY

### Top Project Portfolio Management (PPM) Trends for 2026

**Ross Hensel**, *Clarity PPM Consultant, Rego Consulting*

## 2:30PM PANEL DISCUSSION

### Schedule vs. Time: Who Owns the Critical Path?

Panelists from Clinical Development, Biostatistics, CMC/Technical Operations, and the PMO unpack how adaptive trial designs, realistic forecasting, and clear ownership compress timelines without chaos and how to hold the baseline when pressure hits.

- When an adaptive trial design truly compresses timelines vs. when it adds fragility and how to decide.
- Using probabilistic forecasts (Monte Carlo, Schedule Performance Index bands) in executive decisions: how much confidence is "enough."
- Where CMC/tech-transfer and validation create immovable constraints and which buffers are real vs. cosmetic.
- What "owning the Integrated Master Schedule baseline" should mean: acceptable variance, escalation norms, and decision latency.
- The ethics of schedule risk: patient impact, access timelines, and the moments when saying "no" to compression is the right call.

**Moderator: Mohan Vemulapalli**, *Job Search Program Lead, PMI San Francisco*

**Tim Rumbaugh**, *Vice President Program Management, Edwards Lifesciences*

**Joseph Leonetti**, *Director, CMC Project Management, 4D Molecular Therapeutics*

**Mei-Ling Shen**, *Senior Director, Portfolio & Program Management, Hematology, BeOne Medicines*

**Yuyi Shen**, *Vice President, Technical Operations and Supply Chain, Abcurio, Inc*

## 3:00PM AFTERNOON COFFEE BREAK AND NETWORKING

## 3:30PM WORKSHOPS

### WORKSHOP 1: Networking Within Your Organization: How to Build Better Cross-Functional Connections for Increased Team Collaboration

With the shift to distributed teams following the pandemic, Project and Program Managers are finding it increasingly challenging to build the strong, personal working relationships across functions that are essential for project and program success.

This highly interactive workshop engages participants in role-playing and collaborative problem-solving exercises, equipping them with practical tools and approaches to strengthen cross-functional relationships and drive more effective collaboration in today's hybrid work environment.

**Marie Spark**, *PM Educational Consultant, PMI San Francisco*

**Mohan Vemulapalli**, *Job Search Program Lead, PMI San Francisco*

## WORKSHOP 2: Core Practices for Better Team Collaboration: A Practical Workshop to Improve How We Make Decisions and Work Together

High performing cross functional teams succeed when decision rights are clear, communication flows consistently, and time is spent on what matters most.

This workshop helps teams move from “working hard” to working intentionally—reducing friction, rework, and decision fatigue while strengthening trust and accountability.

### Participants will:

- Understand their team's current collaboration health
- Identify 1-2 high impact improvement opportunities
- Adopt practical tools for decision making, meetings, and communication
- Align on clear behavioral norms that improve speed and claThe session is grounded in five proven dimensions of team effectiveness:
- Balanced Team – Clear roles, priorities, and accountability
- Decision Making Clarity – Who decides, who advises, and how decisions stick
- Multidirectional Communication – Clear, consistent information flow across functions
- Prioritizing Time & Attention – Fewer updates, more decisions
- Raising & Discussing Challenging Topics – Psychological safety and constructive debate

**Christopher Warner**, *Associate Director of Commercial Operations Program Management, Gilead Sciences*

## WORKSHOP 3: Forward thinking with familiar foundations - New Approaches for managing your Life Sciences Projects

**Alyson Poston**, *Chief Customer Success Officer, Rego Consulting*

### 4:30PM **ROUNDTABLES**

#### ROUNDTABLE 1: Closing Without Ending: Turning Lessons Learned into Monday Morning Change

An interactive roundtable on how teams convert retros into real updates, templates revised, SOPs trimmed, dashboards simplified, and benefits reviews scheduled, so the next decision is easier than the last. Bring one practice that worked (or failed) and leave with two you can try Monday.

- How do you run lessons learned as a product (owners, deadlines, versions) rather than a post-mortem?
- What did you update immediately after your last program (gate template, SOP, dashboard, decision log)?
- How do you time benefits reviews (30-90 days) and decide when to re-baseline the portfolio?
- Which decision quality metrics do you track over time (latency, reversals, scenario coverage, prep effort)?

- Culture cues that stick: what replaces “champagne moments” with steady cadence (e.g., 8:30 stand-ups, one-page packs, “three thresholds max”)?

**Jeff Wang**, *Director, Portfolio Strategy, BeOne Medicines*

#### ROUNDTABLE 2: Project Prioritization and Annual Budgeting within MedTech

**Vicki Mullen**, *Director, Enterprise Portfolio & Execution Leader, Terumo BCT*

#### ROUNDTABLE 3: Breaking Silos: CMC-Led Strategies for Cross-Functional Alignment Across the Program Lifecycle

**Yuyi Shen**, *Vice President, Technical Operations and Supply Chain, Abcuro, Inc*

#### ROUNDTABLE 4: One PMO, Many Methodologies – Is It Possible?

The traditional PMO was built for consistency — one framework, one playbook, one way of working. But today's organizations are anything but uniform. This session brings together practitioners to explore a question that is reshaping how PMOs operate: Can a single PMO effectively govern and support teams running entirely different methodologies — and if so, how?

### We will explore:

- Does your PMO use multiple methodologies for different projects — Waterfall, Agile, Lean, and hybrid?
- What breaks in such a paradigm? What works? What KPIs are used to aid governance?
- How do you build a PMO culture that empowers autonomy without losing accountability?

Whether you're leading a PMO in transition, managing a blended portfolio, or simply questioning whether your current framework is holding your teams back — this is the conversation for you.

**Dhruvi Trivedi**, *Associate Director, PMO, Veracyte, Inc.*

#### ROUNDTABLE 5: Data Driven Gating in Practice: Making Defensible Go / No Go Decisions

This roundtable will explore how biopharma organizations operationalize data driven decision gates across the R&D lifecycle. We'll discuss how portfolio, clinical, financial, and risk signals are integrated to support Go / No Go and re prioritization decisions; common challenges in moving from frameworks to real world decisions; and practical approaches to improving transparency, consistency, and cross functional alignment while maintaining decision speed.

**Neha Doshi**, *Associate Director (Portfolio Strategy & Analytics), Gilead Sciences*

### 5:30PM **NETWORKING COCKTAIL RECEPTION**

Sponsored by WHY SUMMITS

For those with energy left to spare, we have a special experience planned. Engage with industry peers in a relaxed setting and build lasting connections.

8:25AM  **CHAIRMAN OPENING REMARKS**

8:30AM  **CASE STUDY**

### The RAID Log That Steers: Governance Behaviors That Turn Risk into Action

A pharma/biotech inside view of how Risks, Assumptions, Issues, and Dependencies (RAID) moved from paperwork to portfolio control. We'll show the concrete behaviors: ownership, thresholds, mitigations, and escalation, that shortened decision latency, protected bottleneck roles, and reduced multi-program slips, using redacted RAID items) from West Coast/U.S. portfolios.

- Defining clear owners and due dates for each RAID entry and the rule that no risk exists without a named mitigation and trigger.
- Installing leading indicators (queue length, utilization, turnaround time) with thresholds that auto-initiate mitigation work and release management reserve.
- Treating dependencies as governed constraints: pre-booking external capacity, cross-training plans, and a documented escalation path when limits bite.
- Creating a RAID-to-decision cadence: what enters the weekly forum vs. the monthly steering committee, and how reversals are tracked.
- **Outcomes (anonymized):** decision latency ↓ 30–40%, multi-program schedule slips ↓, bottleneck overtime ↓, and predictability of the critical path ↑ with a redacted RAID excerpt pack attendees can reuse.

**Dominique A. Kagele**, *Portfolio Strategy & Management, Genentech*

9:00AM  **CASE STUDY**

### Strategic Orchestration: Contrasting Portfolio Strategy in Biotech and Big Pharma

This session contrasts portfolio strategy across biotech and big pharma, highlighting what each can learn from the other. Biotechs bring focus and speed; large organizations offer scale and rigor. Both fall into predictable traps: reactive short-termism on one side, slow and siloed complexity on the other.

We introduce a Decision Science–driven approach to enable objective, cross-functional decisions across R&D, Commercial, and Business Development. Attendees will gain practical frameworks for defining enterprise value, evaluating trade-offs, prioritizing where to invest the next marginal dollar, and designing governance that drives better outcomes regardless of organizational size.

**Deepak Veeraraghavan**, *Partner, Blue Matter*

9:30AM  **PANEL DISCUSSION**

### Change Leadership: Moving from Project Thinking to Portfolio Thinking

A candid conversation about changing behaviors, not just templates. Leaders share how they retire “status theater,” clarify who decides what, and create cadences and incentives that make faster, better portfolio decisions stick across Clinical, CMC/Tech Ops, Regulatory, Access, and Finance.

- **Stop / Start:** what to stop doing (status updates, RAG rituals) and what to start (Decision Labs with thresholds, reversal tracking).
- **Role charters that reduce friction:** crisp accountabilities for PMO vs. functions; who recommends, who decides, who executes.
- **Communication cadences that cut meetings:** monthly portfolio forums, weekly Obeya walls, and SLAs for escalations.

- **Incentives that reward outcomes:** tie goals to portfolio KPIs (decision latency, reversals, value delivered), not project volume.
- **Adoption playbook:** change champions, 30/60/90-day checks, and how to hard-wire new habits into gate templates and packs.

**Moderator: Marie Spark**, *PM Educational Consultant, PMI San Francisco*

**Dominique A. Kagele**, *Portfolio Strategy & Management, Genentech*

**Andrea Espita Arias**, *Director Project Management, Synthego Corporation*

**Laura Grebene**, *Vice President of Project Management, Roche Diagnostics Solutions*

**Marco Sorani**, *Executive Director, Portfolio Strategy & Governance, BeOne Medicines*

**Deepak Veeraraghavan**, *Partner, Blue Matter*

10:00AM  **MORNING COFFEE & NETWORKING BREAK**

10:30AM  **CASE STUDY**

### Capacity Is Strategy: How We Balanced Labs, CROs, and Internal Teams

Inside a pharma/biotech PMO: how throughput rose without burning buffers by protecting bottleneck roles, syncing CRO/lab SOWs to gates, and enforcing work-in-progress (WIP) limits. We'll show the artifacts and before/after outcomes across a multi-program portfolio.

- Role/skill taxonomy that exposed bottlenecks (biostats, CMC analytics, QA) and the WIP limits per role.
- CRO/lab SOW alignment to stage-gates and decision windows (plus penalty/bonus levers).
- Surge strategies: contractor benches, cross-training, pre-booked assays/capacity blocks.
- Throughput metrics leaders actually use: lead time, queue time, overtime, “resource-on-new-priority” time.
- Plus common frictions & fixes: forecast whiplash (sites/enrollment), cadence misalignments, finance reallocation timing, and tool/data lag.
- **Outcomes:** cycle time ↓, overtime ↓, gate latency ↓; redacted templates (capacity policy, WIP rule set).

**Joseph Leonetti**, *Director, CMC Project Management, 4D Molecular Therapeutics*

11:00AM  **CASE STUDY**

### Decisions, Not Dashboards: AI as the New Partner in Pharma Portfolio Choices

The hard part of portfolio management was never the math. It is comparability across projects, honest cross-functional conversations, and decisions actually getting made.

- How Captario SUM uses AI today: scenario comparison and a multi-voice review that surfaces what each function would say about the same project.
- Build vs. buy in the AI era. Prototypes ship in days now. Decision-grade platforms, with methodology, governance, and long-term ownership, do not.
- The next question for boards and regulators: where in this valuation did AI make the call, and how is it documented.

**Magnus Ytterstad**, *Chief Product Owner, Captario*

## 11:30AM PANEL DISCUSSION

### The Bay Area Principle: Orchestrating an Ecosystem Like a Program

A perspective-rich debate on how Bay Area's ecosystem - academia, startups, big pharma, CDMOs, payers, regulators, can move as one without losing integrity. We'll examine shared interfaces, joint cadences, and guardrails that keep speed from outrunning sense, with transparency strong enough to survive scrutiny.

- **Designing shared interfaces:** what data/decisions cross boundaries, in what format, and on what cadence (MoUs/SLAs that actually travel).
- Building joint decision forums that cut latency across companies without creating bureaucracy.
- Applying evidence-linked guardrails across collaborations so urgency never eclipses safety, quality, or access realities.
- **Keeping integrity and independence:** decision logs, conflict-of-interest handling, neutral chairs, and sunlight on incentives.
- **Measuring coordination as an asset:** handoff time, issue resolution time, launch-slip reduction, and clear escalation paths that work across organizations.

**Moderator: Dave Penndorf**, *PPM Advisor, Groundswell Pharma Consulting, LLC.*  
**Joseph Leonetti**, *Director, CMC Project Management, 4D Molecular Therapeutics*  
**Neha Doshi**, *Associate Director (Portfolio Strategy & Analytics), Gilead Sciences*  
**Maya Thomas**, *Executive Director Program Management & Governance, Stanford Health Care*  
**Rohit Chawla**, *Director, Global Program Management, Gilead Sciences*

## 12:00PM LUNCHEON

## 1:00PM KEYNOTE

### Maintaining organizational alignment in a rapidly evolving biotech organization

- How a PMO's role evolves from sole executional focus to into an integrator role in a fast growing organization.

**Gilbert Hausmann**, *Director Program Management, Alamar Biosciences, Inc.*

## 1:30PM CASE STUDY

### Lessons from the Transformation of Tech Product Management for Biopharma PMS

There's widespread speculation about how AI will transform biopharma PPM, but the tech industry has already made this shift. A decade ago, technology product management required many supporting roles, such as scrum masters coordinating sprints, QA engineers manually testing releases, and user researchers synthesizing interviews.

These roles have largely disappeared over the last few years as better software organized work and AI automated synthesis and analysis. Biopharma program managers now face the same transformation: shifting from spending 80% of their time reading reports, writing updates, and reconciling budgets to orchestrating AI agents that do this work while they focus on driving strategic decisions and managing stakeholders.

**Ashoka Rajendra**, *Chief Executive Officer, Orchestra Bio*

## 2:00PM PANEL DISCUSSION

### Alliances with Decision Rights: Making Partnerships Move at the Speed of Risk

A perspective-rich debate on how co-development and CDMO partnerships avoid stalls and value leakage. We'll examine the essentials of one-page "treaties" (decision rights, service-level timings, escalation), reality-based tech-transfer criteria, and milestone structures that release capital when risk actually burns down, grounded in West Coast/Bay Area collaboration norms.

- **What belongs on a one-page alliance RACI:** decision rights, response-time targets, and a clear escalation path that fits on a single screen.
- How to set acceptance criteria for tech transfer that reflect real CDMO capacity, yields, validation cadence, and data handshakes (not a fantasy Gantt).
- Structuring milestones tied to verifiable risk reduction (e.g., PPQ pass, enrollment inflection, safety review) so funding follows progress.
- Pre-agreed issue-to-decision routing for safety signals and deviations (triage timers, quorum, tie-breaker, decision logging).
- **Governance that travels across companies:** auditability, conflict prevention, and how to maintain trust under pressure without slowing the program.

**Moderator: Megha Sinha**, *Managing Partner & CEO, Kamet Consulting Group*  
**Gilbert Hausmann**, *Director Program Management, Alamar Biosciences, Inc.*  
**Rohit Chawla**, *Director, Global Program Management, Gilead Sciences*  
**Jane Li**, *Associate Director Project Management, Soleno Therapeutics, Inc.*  
**Yuyi Shen**, *Vice President, Technical Operations and Supply Chain, Abcurio, Inc*

## 2:30PM AFTERNOON COFFEE & NETWORKING BREAK

## 3:00PM INTERACTIVE SESSIONS

### WORKSHOP 1: Real-World Experience: Crowdsource Your Situation for Insights

Have a horror story? A success story? A current challenge with building PMO capability? Come share your experience as we hear about challenges other PMs are facing, including perspectives on choosing the "right" tools for your organization and critical capabilities.

Grounded in real-world knowledge, we will explore the planning and portfolio tools being used, along with the capabilities that matter most, and have a candid discussion about what works, what doesn't, and why. Expect practical insights, honest feedback, and actionable ideas to strengthen your planning and portfolio approach.

**Kathryn Davidson**, *Senior Director, Portfolio & Program Management, Cytokinetics*  
**Kim Tran**, *Director, Portfolio & Program Management, Cytokinetics*

### WORKSHOP 2: An Outlook for AI-Assisted Portfolio & Clinical Decisions

**Jane Li**, *Associate Director Project Management, Soleno Therapeutics, Inc.*

### ROUNDTABLE: The Evolving Role of PM and the Skills Needed for the Future

**Laura Grebene**, *Vice President of Project Management, Roche Diagnostics Solutions*  
**Lisa Wyatt**, *TA Head, Global Program Management, Infectious Disease, Ophthalmology, and Immunology, Genentech*

## 4:00PM END OF THE CONFERENCE

# OUR VALUED PARTNERS, PAST AND PRESENT



# CONTACT US



## GENERAL INQUIRIES:



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Vice President, PPM World Tour

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**Margaréta Mižáková**

Conference Producer

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