

# COMPETITIVE INTELLIGENCE REPORT

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Healthcare Strategies

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In this issue of the *Competitive Intelligence Report*, we focus on how the pharmaceutical industry is evolving to address the global economy, generic intrusion, healthcare reform and other factors that are forcing them to conduct business in new ways and why this is important to the competitive intelligence professional.

## Between the Lines

Fletcher/CSI

The pharmaceutical industry is at an unprecedented cross-road with many threats converging simultaneously. Which direction the industry takes on this journey is a complicated matter – and is one that is keeping many company leaders up at night trying to determine the best path for their companies.

The first article *Checkmate*, discusses how pharma companies may be forced to change their business models. Instead of spending an enormous amount of resources finding blockbusters, as they did in the 90's, they will need to develop their pipelines for the long-term. They may do this through being more flexible, combining several core specialties or even jumping into the generic market themselves.

The article discusses the main argument for patent exclusivity, both in the past and today: the very large investments necessary to develop new drugs. Some companies are driving a move away from this model by a more comprehensive model that is adaptable to the current and potential future situations. The article sites several examples of how companies are optimizing their portfolios towards orphan diseases and other niche markets such as biologics.

Finally this first article concludes with a discussion of other factors the pharmaceutical industry is faced with, such as foreign drug importation,

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## Checkmate

Marie Shields, Editor, Next Generation  
Pharmaceutical | June 2009

Generic drugs, having long been minor players in the pharmaceutical marketplace, appear to be gaining a strategic advantage. Is this end game for branded products?

Thanks to President Obama's recommendation that they should use as a way of making cheaper treatments available to the public, the fortunes of generic drugs are on the rise. What effect will this have on research-based pharmaceutical companies, which have argued for years that extended patents on their products are necessary in order for them to recoup the millions they invest in research and development?

Add to that the fact that big pharma companies are facing a host of other pressures at the moment: problematic pipelines, a dearth of new blockbusters, patent expiries – not to mention the global financial crisis – and you have a potentially explosive situation for the industry.


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## Between the Lines (cont.)

healthcare reform and higher taxes on research and development. The bottom line is that pharmaceutical companies will have to change the way they do business in order to survive.

The second article *Distinguishing Portfolio Management, Program Management and Project management*, reviews the differences between these often misunderstood terms. It is important to foster common definitions so that everyone responsible for the portfolio knows what each member of the team is doing.

What does all this have to do with competitive intelligence? As companies look to evolve, they are making decisions based on the environment they see today and the potential environment they may face in the future. One of the first places companies look to in fostering the inevitable evolution is their portfolio of products and pipelines. How they manage their portfolios will determine the future of the company. Balancing the portfolio to address corporate strategy is crucial to success. Competitive intelligence can provide the conduit between the various functions for an orderly process, the necessary skill sets to conduct research, analysis and provide recommendations needed to make the best decisions possible.

How is your company positioned to take the lead in this process? 

## Distinguishing Portfolio Management, Program Management, and Project Management

John Reiling | July 24, 2009 | Articlesbase

There is often a misunderstanding, and hence a mixed and overlapping use of terms, when it comes to program management. Sometimes a program is called a project. Sometimes a project is called a program. In addition, sometimes project **portfolio** and program are mistakenly used interchangeably. This article is intended to clarify the main differences and to distinguish the unique aspects of project portfolios, programs, and projects.

A great way to start to think about these is to think in terms of a pyramid hierarchy. At the top of the pyramid is **portfolio management**, which contains all of the projects and programs that are prioritized by business objectives. Below that is **program management**, which contains numerous projects that are interrelated, since they support a particular business objective. **Programs** consist of multiple projects, but projects can be independent and simply part of the portfolio. **Projects** differ from programs in that they are strictly tactical in nature.

For a more detailed look at each...

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## New Fletcher/CSI Healthcare website is live!

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- Better Navigation
- New **Events Calendar** highlights medical conferences in all fields of practice
- **Newsletter Archives** allow you to easily search for past issues of the *Competitive Intelligence Report*
- Strategic and Tactical Studies



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Decision Support and Training on Competitive and Market Issues for Pharmaceutical Senior Management

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# Portfolio Optimization from Fletcher/CSI Healthcare Strategies

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ADAPTIVE  
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Fletcher/CSI Healthcare Strategies **portfolio optimization** consulting services are focused on assisting you in driving revenue growth through three essential elements of portfolio optimization: portfolio gap analysis, gap filling strategies, and organizational alignment. Our in-depth research and analysis provides you with a thorough understanding of the gaps in your portfolio, highlighting opportunities and threats. Our industry experts facilitate the creation and implementation of gap filling strategies to help you gain competitive advantage. And finally, our experienced functional leaders guide you in aligning your organization to foster collaboration and functional excellence, improving productivity.

For a complete look at Fletcher/CSI's Portfolio Optimization services, please visit our [website](#) or drop a quick note to [info@fletchercsi-healthcare.com](mailto:info@fletchercsi-healthcare.com). To speak with one of our specialized team of professionals, call us at (610) 361-1209.



## Conference Schedule

The following is a partial list of upcoming conferences. To learn more about other conferences occurring in 2009/2010, visit our website [www.fletchercsi.com/healthcare](http://www.fletchercsi.com/healthcare) or email [info@fletchercsi-healthcare.com](mailto:info@fletchercsi-healthcare.com)

### Competitive Intelligence

**SCIP European Summit 2009** — Nov. 4-6, 2009 — Amsterdam, Netherlands — [www.scip.org](http://www.scip.org)  
**Assoc. for Strategic Planning Annual Conference** — Feb. 22-24, 2010 — Pasadena, CA — [www.strategyplus.org](http://www.strategyplus.org)

### Healthcare/Pharmaceuticals

**Strategic Resource Management & Portfolio Management** – Nov. 2-4, 2009 – Philadelphia, PA – [www.healthtech.com/sra](http://www.healthtech.com/sra)  
**Chemotherapy Foundation Symposium** — Nov. 10-14, 2009 — New York, NY — [www.reedmeded.com](http://www.reedmeded.com)  
**American Society of Consultant Pharmacists Annual Meeting** — Nov. 19-22, 2009 — Anaheim, CA — [www.ascp.com](http://www.ascp.com)  
**Radiological Society of North America** — Nov. 29 – Dec. 4, 2009 — Chicago, IL — [www.rsna.org](http://www.rsna.org)

### Medical Devices

**Medical Device Puerto Rico** — Mar. 4-5, 2010 — San Juan, PR — [www.medicaldevicepuertorico.com](http://www.medicaldevicepuertorico.com)

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► Top 5

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[7th Annual Strategic Resource Management & Portfolio Management Conference](#)

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## Top 5 ...

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