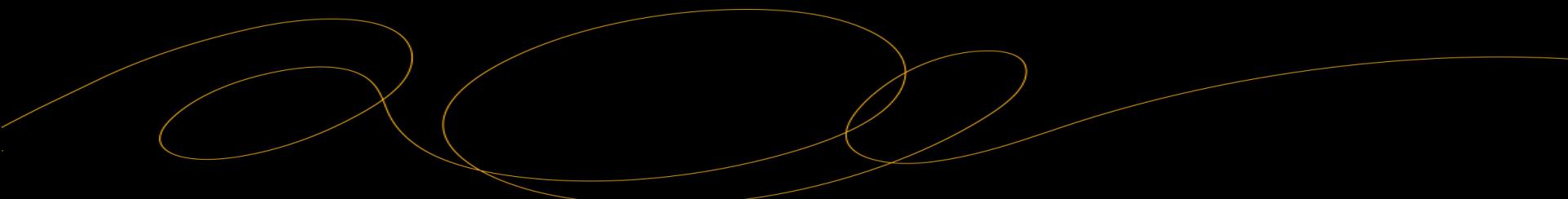




© Brad Wilson, 2014

management • communication • marketing

business navigation for medtech & dental small-to-medium enterprises



CROSS-  
INDUSTRY



NEW BUSINESS  
SEGMENTS



GO-TO-  
MARKET

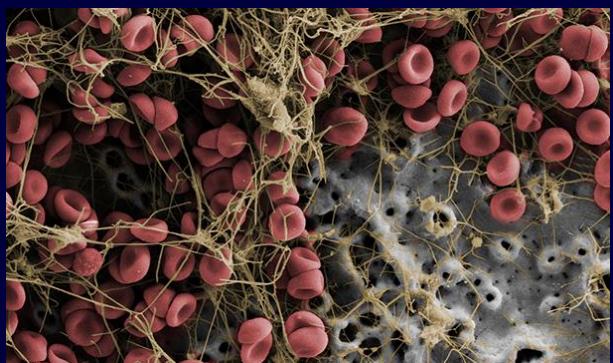


IMPLEMENTATION





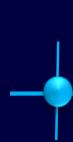
50389467503984039215074  
928734928738916015071698  
348509374987308275090  
250981629438162943816294



# Marcel J. Scacchi

MSc, MSc, BBA





# facts & figures

30 years  
experiences

37 experts  
available

87 successful  
projects

4 failed  
projects



MARKETS  
EU, ASIA, USA

CLIENTS  
45% dental 30% trauma  
15% biotech 10% non-profit

VARIOUS  
PARTNERS

# medtech market in 2020

GLOBAL

\$469bn

\$bn/revenues based on est. manufacturers sales

MEDTECH

5%

estimated compound annual growth rate 2016-2020

MARKET

USA

RoW

CHN

JPN

B.R.I.

GER

37% = 174bn / CAGR 4%

28% = 131bn / CAGR 4%

12% = 56bn / CAGR 9%

10% = 47bn / CAGR 2%

7% = 33bn / CAGR 8%

6% = 28bn / CAGR 2%

**ATTRACTIVE**

**HETEROGENOUS**

**SOLID DRIVERS**

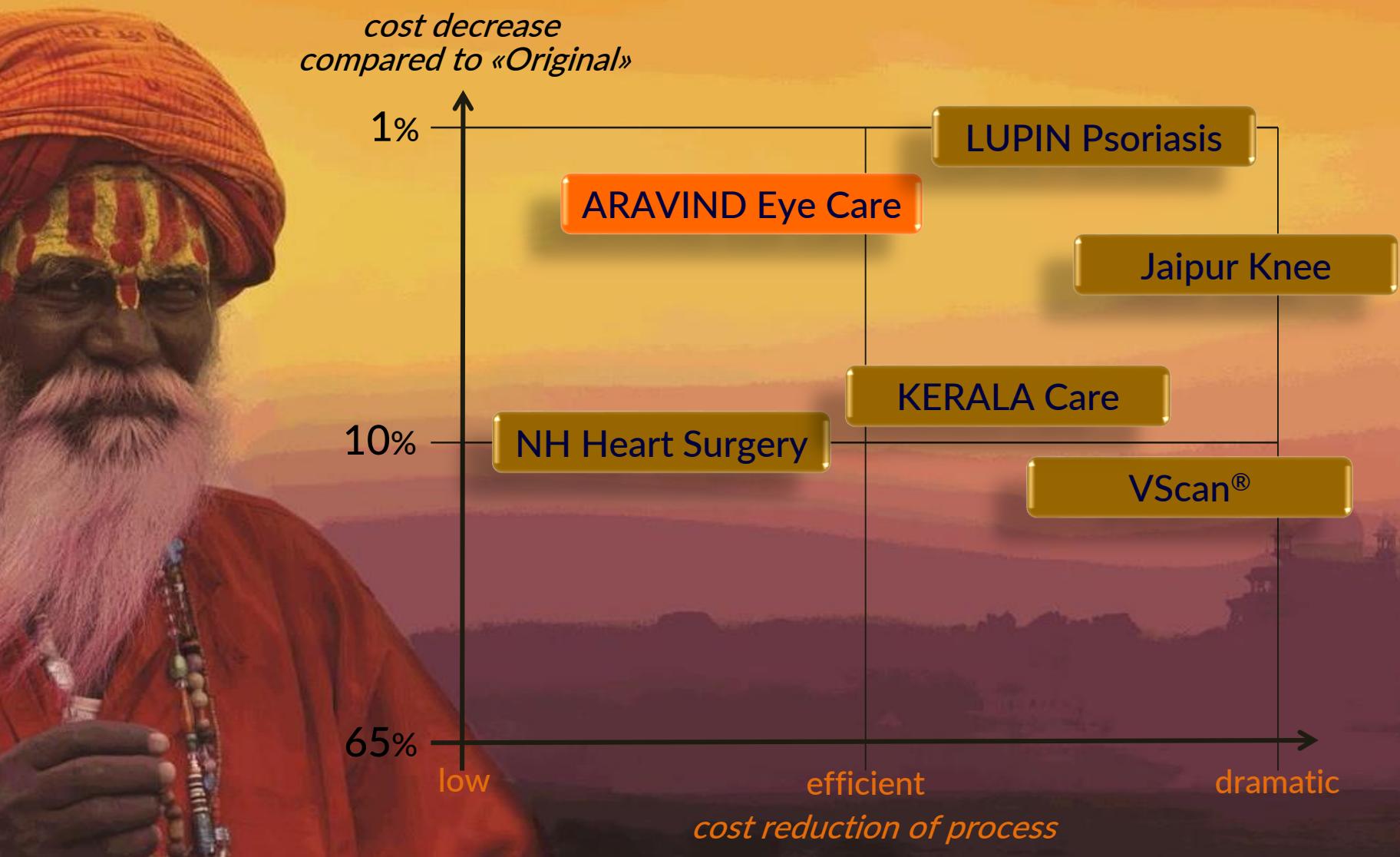
challenges

**GOOD ENOUGH  
vs. HIGH-TECH**

**PRESSURE  
ON MARGINS**

**REGULATORY  
REQUIREMENTS**

# performance at low cost

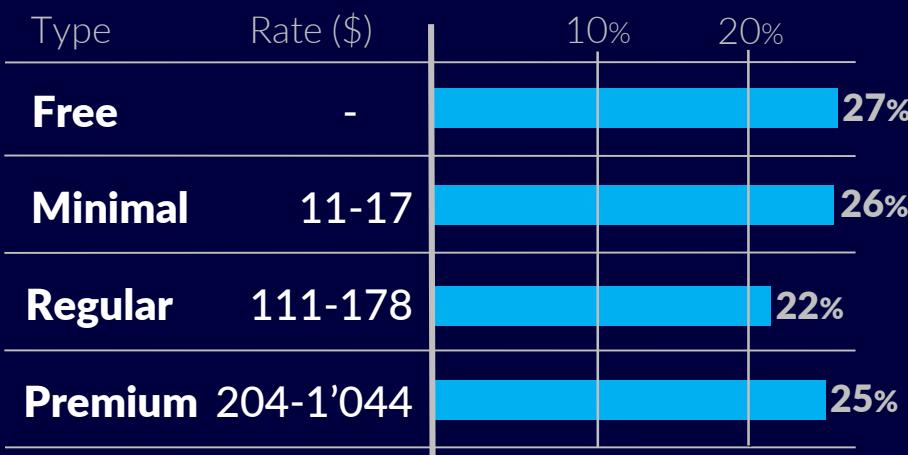


# ARAVIND eye care centers (2015)



## price list cataract surgery

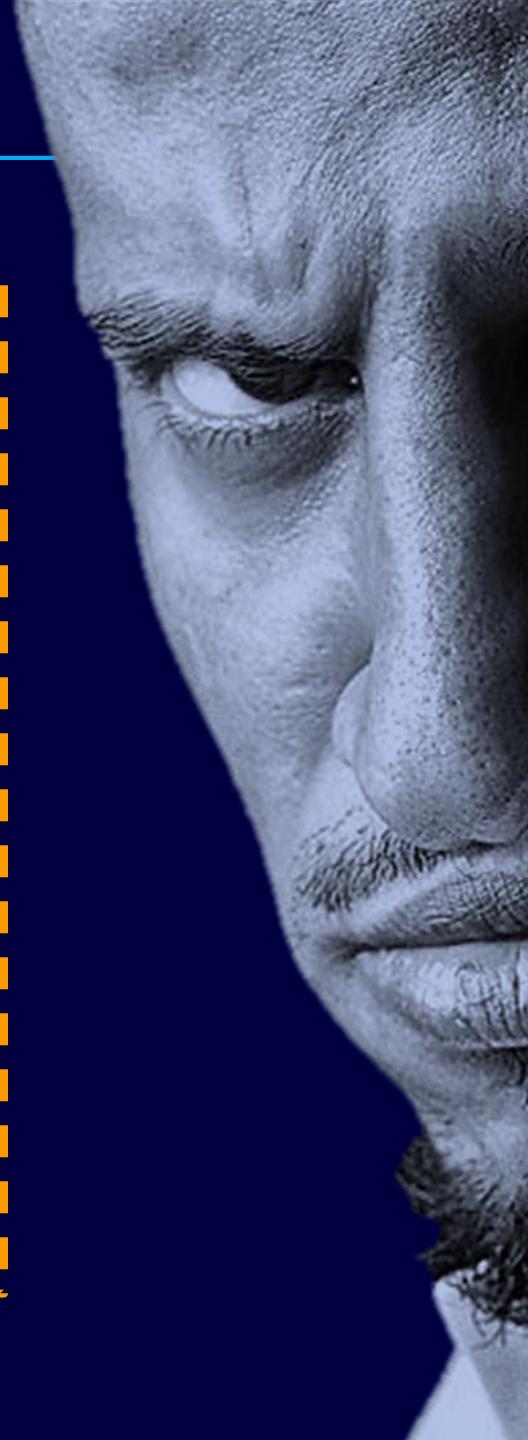
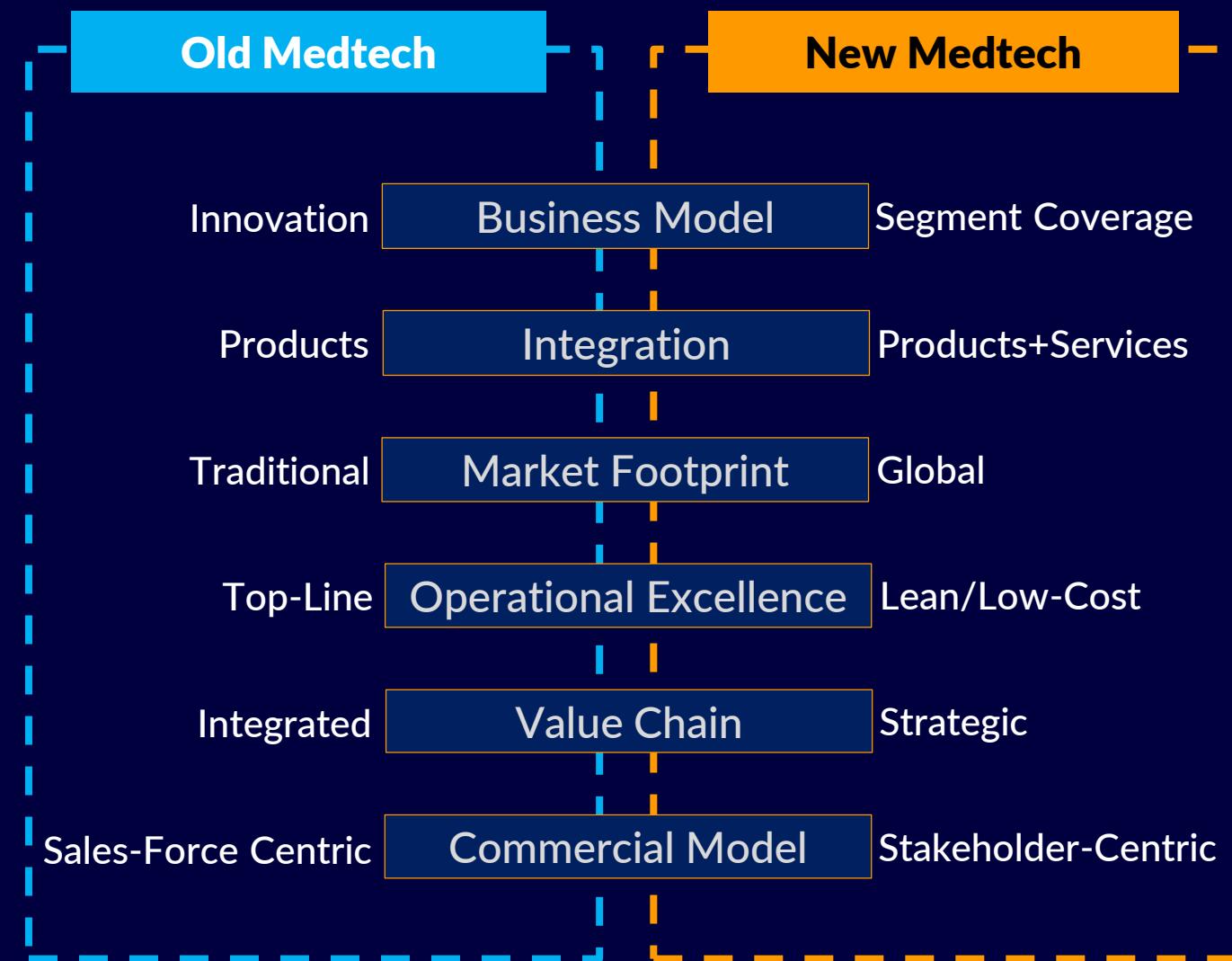
## patient % by fee type



**high quality**  
**+large volume**  
**=low cost**

408'220 surgeries  
3'727'227 visits

# broken business model



# new business models

---



world's largest accommodation provider



world's largest phone company



world's most valuable retailer



world's largest movie house

# strategic challenges

A black and white photograph of a group of young people from the movie Maze Runner. They are standing in a dark, enclosed space, possibly a corridor or a room with tall, weathered wooden walls. Some individuals are holding torches, casting a dim light on their faces. They are dressed in simple, worn clothing, suggesting they are survivors or rebels. The overall atmosphere is one of confinement and danger.

- globalization
- markets
- simplicity
- focus, agility
- collaborate

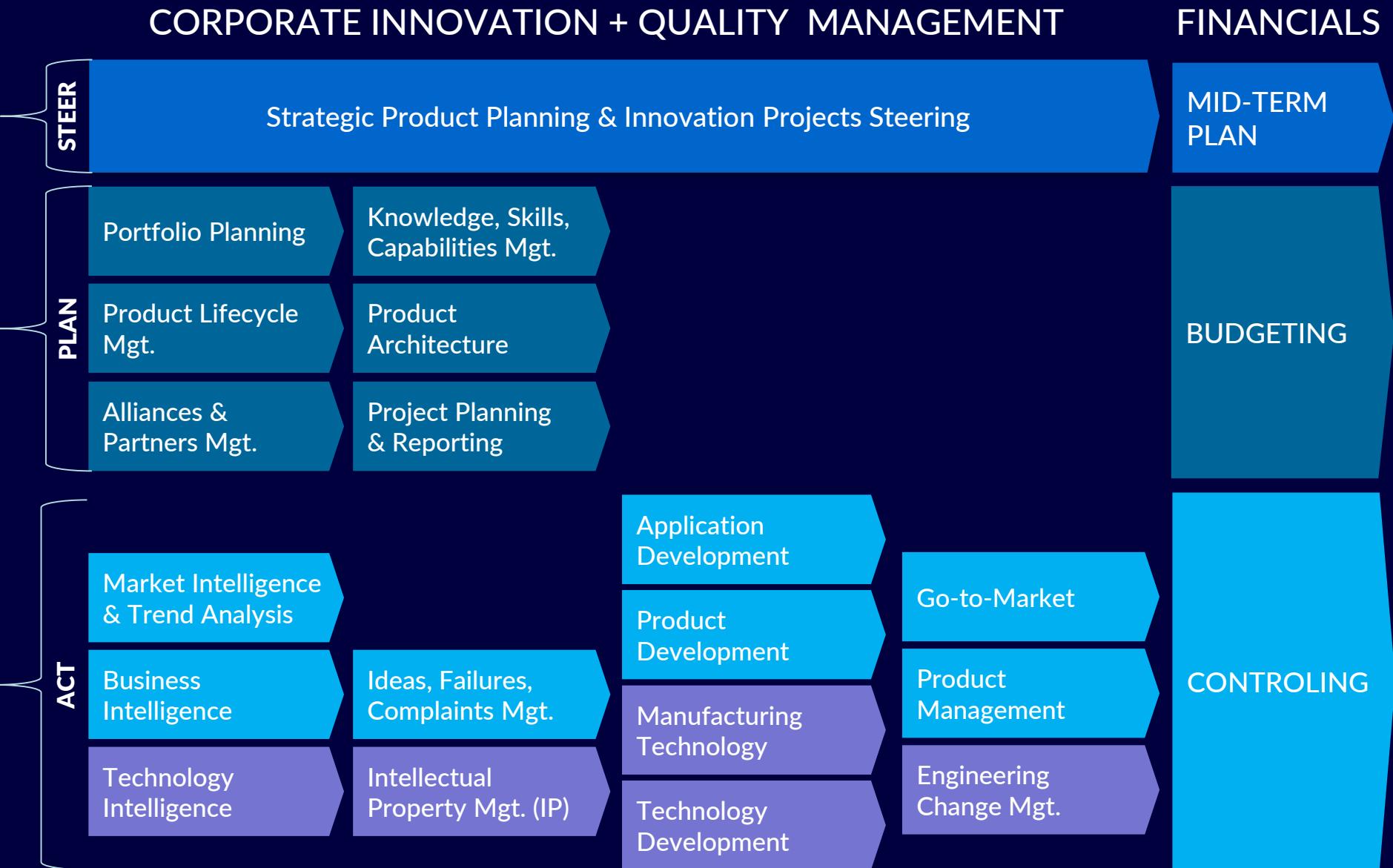


# why projects fail

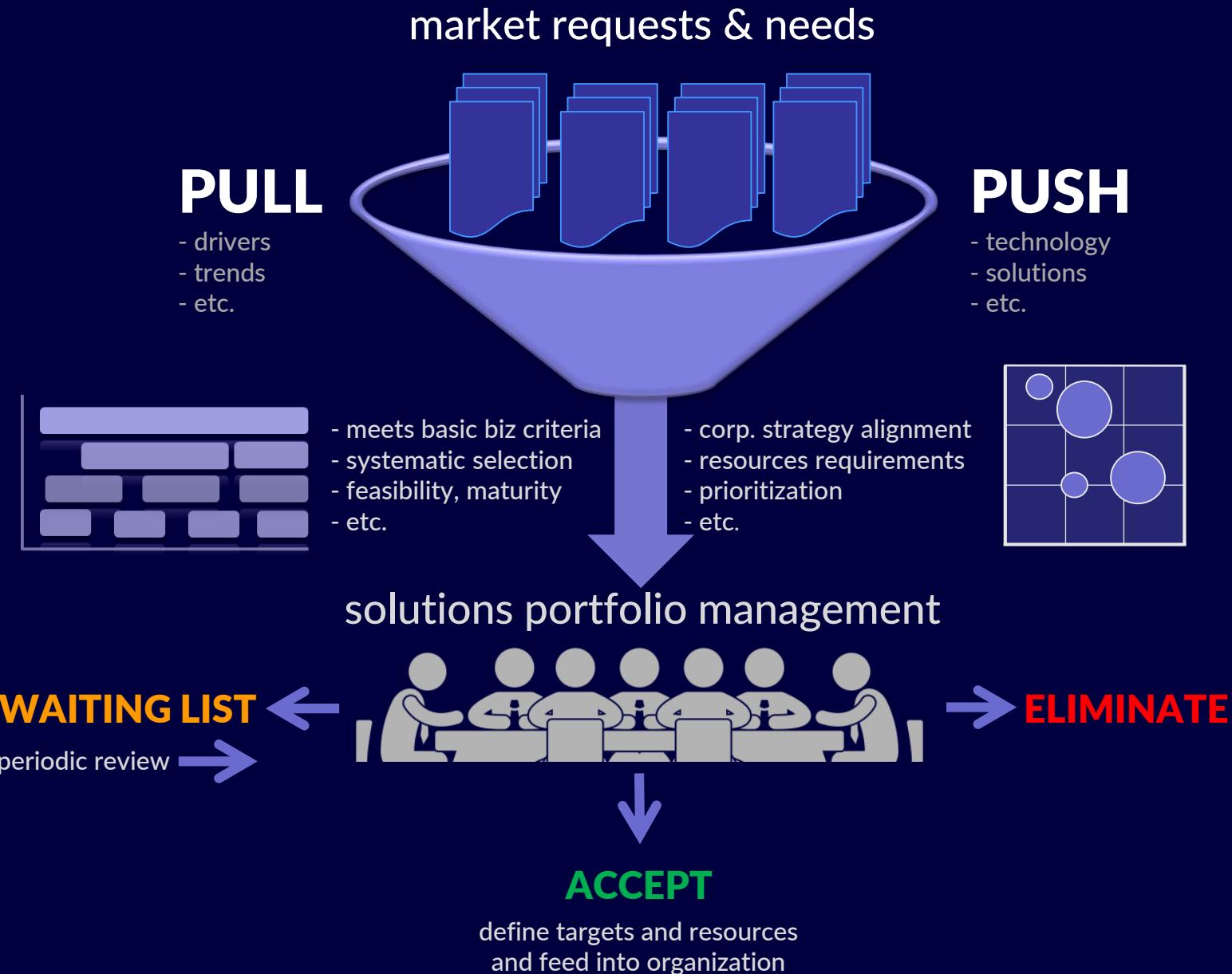
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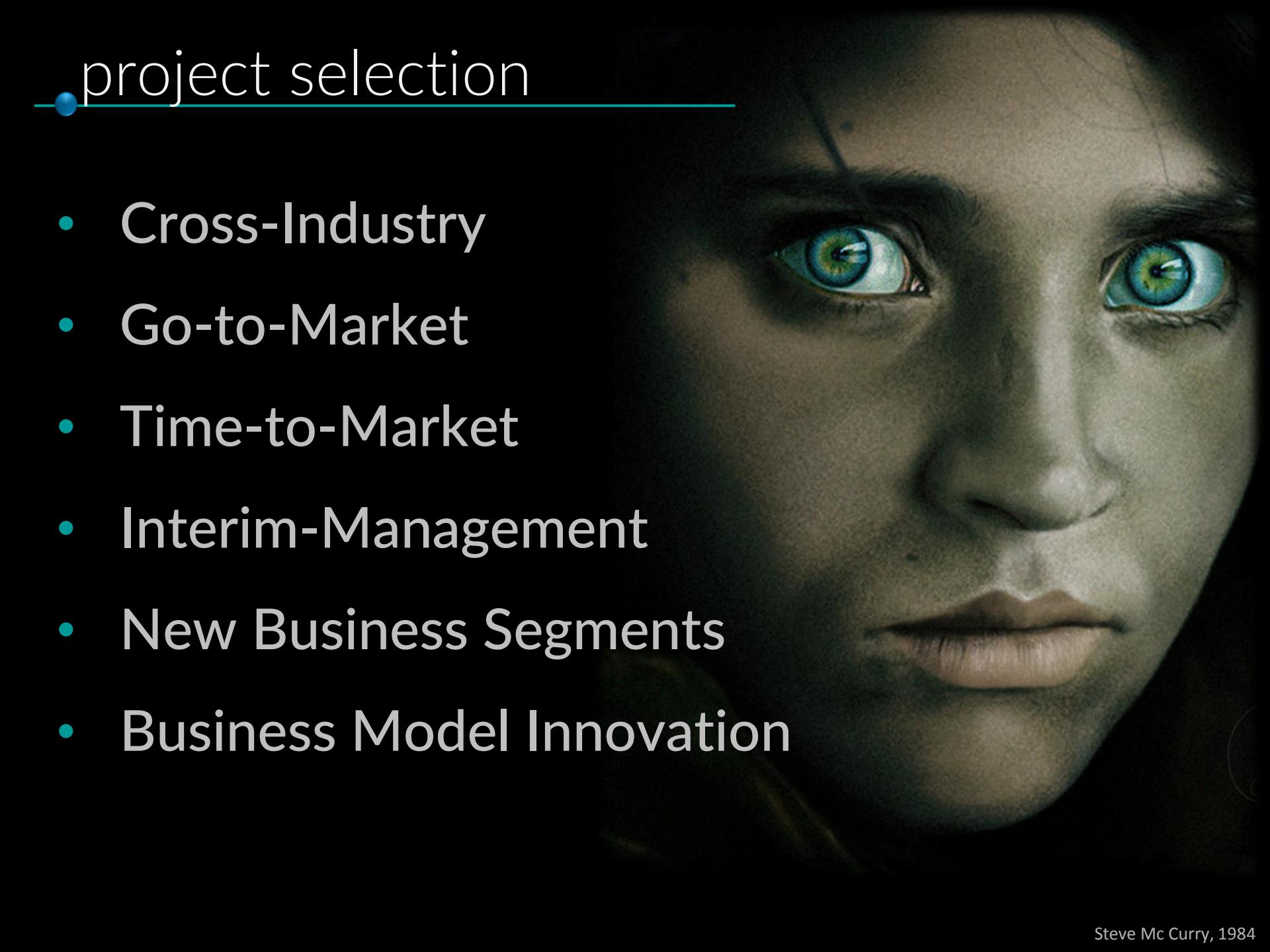
- unclear targets **68%**
- limited resources **48%**
- intercultural issues **45%**
- technology **8%**

# innovation process landscape



# business opportunity landscape





# project selection

---

- Cross-Industry
- Go-to-Market
- Time-to-Market
- Interim-Management
- New Business Segments
- Business Model Innovation

# leading transformation



- 1** mechanization,  
water power,  
steam power



- 2** mass production,  
assembly line,  
electricity



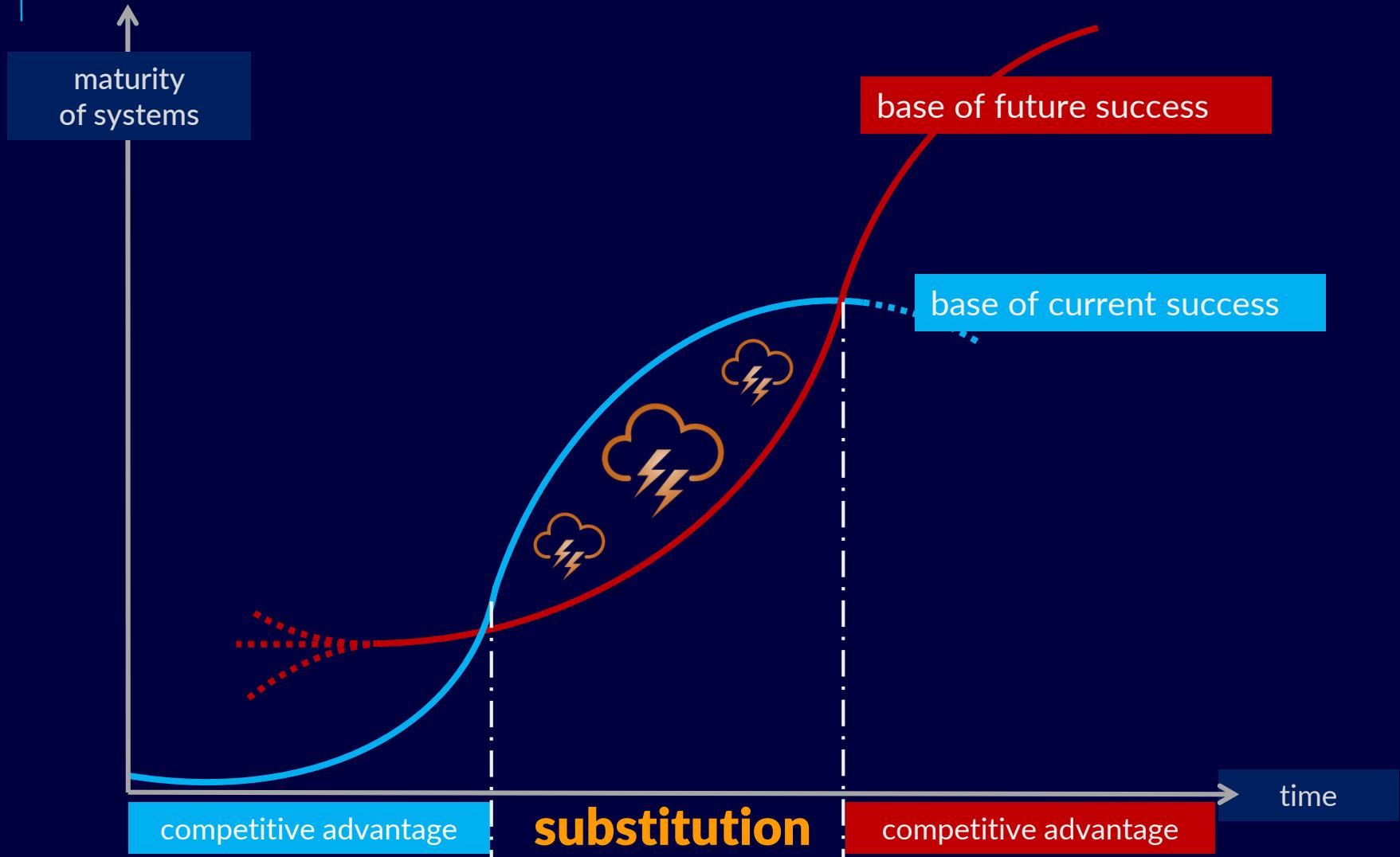
- 3** computer and  
automation



- 4** cyber physical  
systems

Bolling M (2017): **Henry Ford 4.0: Getting Digital Leadership Right in Industrial Manufacturing Just Might Drive Your Margins Up by 26%.** Egon Zehnder International Inc.; Boston; Conversations on Leadership.

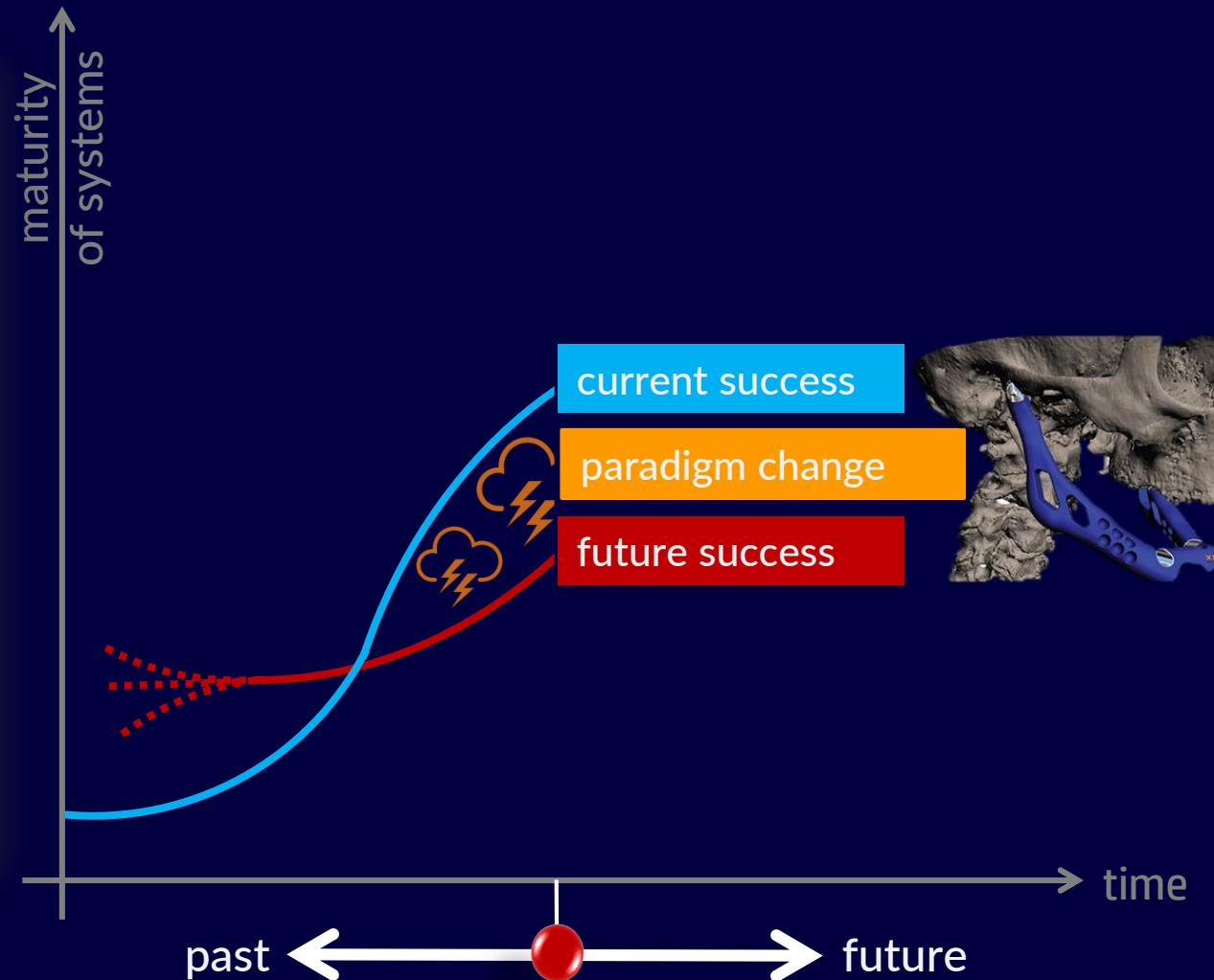
# pattern of change



# one strategy does not fit all



C.Marchetti



# 3d printing in medtech

## RESEARCH

## TRANSFER

## INDUSTRY

### METALS

Nickel-Titan

Tantalum

CoCr

Mg-Alloys

other Ti-Alloys

TiAl<sub>6</sub>V<sub>4</sub> / cpTi

stainless steel

precious metals

### POLYMERS

Polylactide

Photopolymer

PEEK/PEKK

Polyamide

Hydroxyapatite, Al<sub>2</sub>O<sub>3</sub>

ZrO<sub>2</sub>

### CERAMICS

### TISSUE

«Bio-Printing»

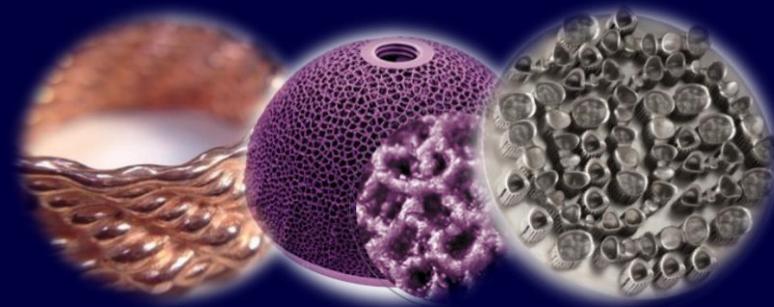
# 3d printing in medtech

RESEARCH

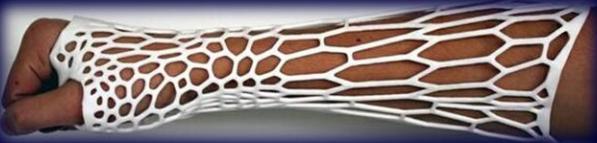
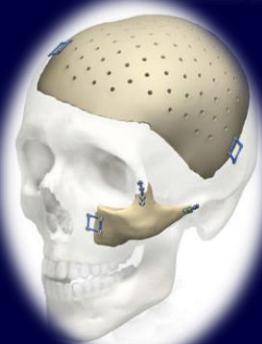
TRANSFER

INDUSTRY

METALS



POLYMERS



CERAMICS



TISSUE



GEORGE WASHINGTON  
1732-1799



# dental digital workflow

patient file, marketing

cad-cam / s.l.m. / 3d-print  
production

dvt, ct,  
x-rays

case  
planning

restorative  
design

surgical  
navigation

scanning  
*intraoral, master cast, impression*

3d-printed  
temporaries

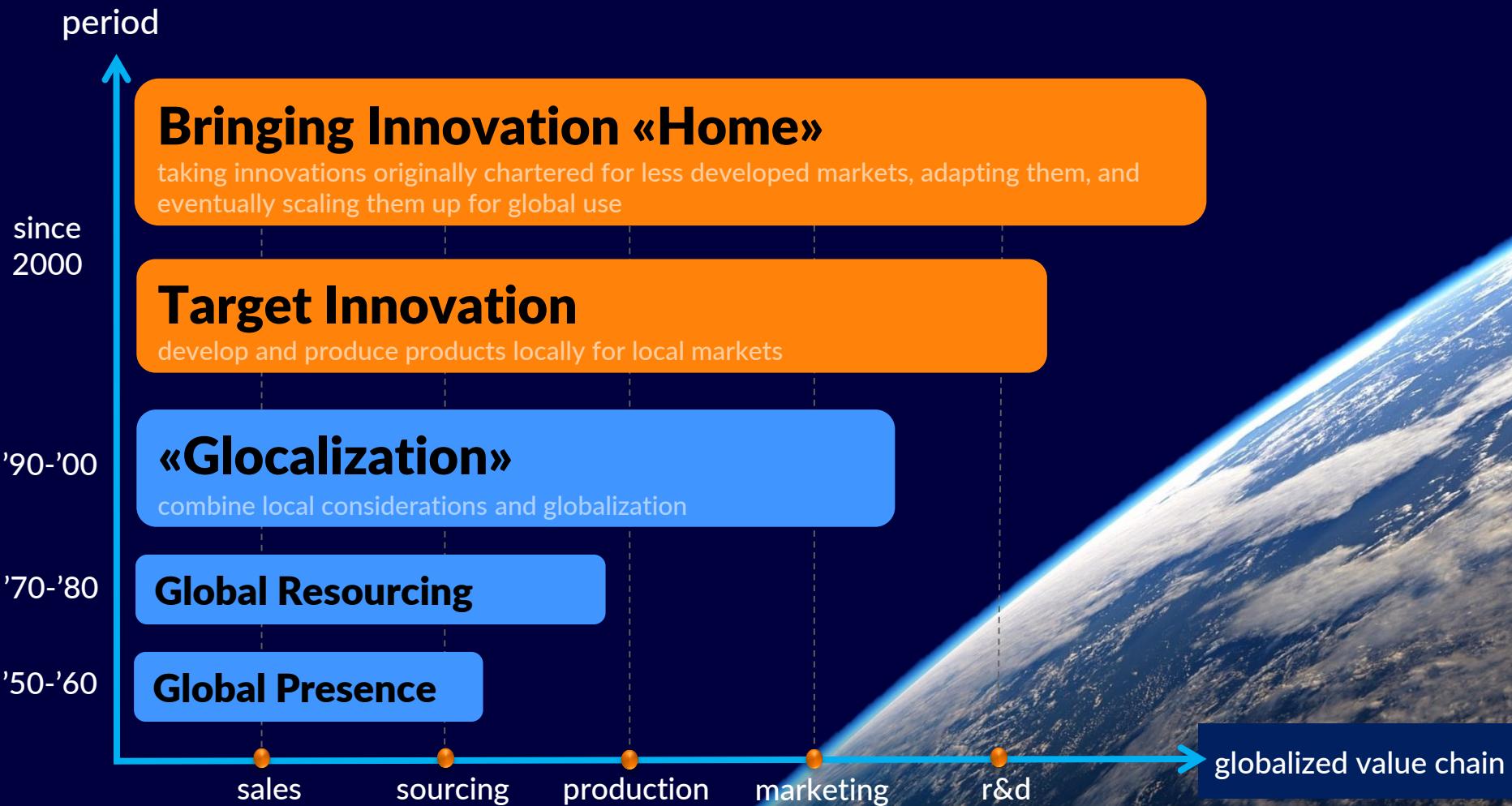


**‘when a new idea emerges,  
the Americans transform  
it to a business,  
the Chinese copy it,  
and the Europeans  
regulate it.’**

**Emma Marcegaglia**

President of ENI; Chair of Italian Industrial Association

# globalization of innovation



# big vs. small



outsiders will always be outlaws

outsiders must define their own rules

outsiders must go to extreme lengths

outsiders must face their weaknesses



Arreguín-Toft I (2001);

How the Weak Win Wars: A Theory of Asymmetric Conflict.  
*International Security*; 26; 1; 93-128



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