



11.16.2017

BALANCED

CHAOS

THE 15<sup>TH</sup>  
ANNUAL  
MIT  
SLOAN  
CFO  
SUMMIT

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# DEAR FRIENDS



**WELCOME** to the 15th annual MIT Sloan CFO Summit! We're willing to wager you had at least two or three other demands on your time today. With this decision, therefore, you have already demonstrated an ability to create order out of choices. And isn't that what good leadership is all about? Inhaling an extraordinary number of inputs, including people, policies, potential strategies and possible products; and exhaling a coherent, meaningful business plan.

Which brings us to our theme, "**Balanced Chaos.**" Balanced chaos is order created out of options. For example, how does a biotech company decide which clinical trial to fund next? Where does a venture capital firm allocate its next investment? Options are sometimes good so many good people, which ones do I hire? And sometimes "options" is another word for uncertainty, aka chaos. Successful CFOs know how to make decisions, convey those decisions with confidence, and manage with certainty.

Therefore we are delighted to open the conference with a conversation on **Leadership ABCs – Allocating, Balancing and Choosing**. Thomas A. Kolditz, Director,

Ann and John Doerr Institute for New Leaders, will share leadership lessons derived from his military, disaster management, academic and business experience. Tom will share how he weighs options, makes choices and allocates human and financial capital.

Our luncheon keynote, **CFO Leadership: From Chaos to Calm**, includes CFOs from Ingram Micro, JetBlue and Yahoo!, led in conversation by the Wall Street Journal. These leaders understand composure in the face of uncertainty, including opportunities and challenges. We look forward to hearing their strategies for managing through uncertainty, and their solutions for offering clarity and forward progress.

Our breakout panels today are organized along two tracks – one track looks at **information management**: how to protect internal data and manage external threats; the role of predictive analytics; and strategies for managing cybersecurity. The other track offers perspectives on **decision management**: who to include and when to organize a deal team; how, when and under what terms to raise capital; and whether your career is better served as a CFO with deep industry expertise and/or experience across different sectors.

iRobot co-founder Helen Greiner keynotes our closing session, **Long-Term Start-Up Success**. Now CTO for CyPhyWorks, a start-up specializing in small drones for the consumer, commercial and military markets, she will share her insights on the impact of near-in decisions on long-term results. And vice versa, how long-term goals inform near-in decisions.

This Summit would not be possible without the CFOs on our volunteer team. Planning this conference is practically a year-round effort. This group of men and women who dedicate themselves to this effort are listed to the right. As you enjoy today's Summit, please say hello.

We are also fortunate to be supported by a great group of sponsors. As the CFO Summit's reputation has expanded, many outstanding organizations wish to be

involved. This enables us to partner with thought leaders in their respective industries. Without their financial support and intellectual contributions, we could not bring you this annual event, which has been recognized as the most influential conference of its kind. So, please join us in thanking our gold level sponsors IBM, SAP, Silicon Valley Bank and UBS. Our silver sponsors are Cybereason, KPMG, Nixon Peabody, ICE/NYSE, and Robert Half. They are joined by our networking sponsors, MIT Sloan Executive Education and HR Knowledge.

A great day is in front of us. Learn much, network well, and have fun!



**JEREMY SEIDMAN**

*Co-Chair, MIT Sloan CFO Summit*



**JACK McCULLOUGH**

*Co-Chair, MIT Sloan CFO Summit*

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### TINA KRUCZYNSKI

Program Manager, MIT Sloan CFO Summit

### BETH KURTH

VP, IR, LaVoieHealthScience

### JACK McCULLOUGH

MBA 1997, Co-Chair, MIT Sloan CFO Summit

### PAUL RYAN

CFO, Interaction Associates

### JEREMY SEIDMAN

MBA 2003, Co-Chair, MIT Sloan CFO Summit

### KRISTIN TODD

Marketing Director, MIT Sloan CFO Summit



**45**  
MINUTES

**REGISTRATION & CONTINENTAL BREAKFAST**  
7:30 AM – 8:15 AM | Grand Ballroom Foyer

**30**  
MINUTES

SPONSORED BY HR KNOWLEDGE  
**MORNING COFFEE BREAK**  
10:00 AM – 10:30 AM | Grand Ballroom Foyer

**30**  
MINUTES

**LUNCHEON BUFFET**  
11:30 AM – 12:00 PM | Grand Ballroom Foyer

**15**  
MINUTES

## OPENING REMARKS

Grand Ballroom

8:15 AM – 8:30 AM

**JEREMY SEIDMAN, MBA '03**  
MBA '03, Co-Chair, MIT Sloan CFO Summit

**JACK MCCULLOUGH, MBA '97**  
MBA '97, Co-Chair, MIT Sloan CFO Summit

**1**  
HOUR

10:30 AM – 11:30 AM

## TRACK 1 | INFORMATION MANAGEMENT **CYBERSECURITY FOR THE CFO**

Grand Ballroom

**KERI PEARLSON** ●  
Executive Director, (IC)<sup>3</sup>

**BRIAN COHEN**  
CFO, BitSight Technologies

**MALCOLM HARKINS**  
CSO, CTO, Cylance, Inc.

**PHONG LE, MBA '05**  
CFO, MicroStrategy

**SUMUKH TENDULKAR, MBA '02**  
Director of Product Marketing, IBM Security

**1.25**  
HOURS

12:00 PM – 1:15 PM

LUNCHEON KEYNOTE PANEL

## **CFO LEADERSHIP: FROM CHAOS TO CALM**

Grand Ballroom

**PETER HIRST** ○  
Associate Dean, MIT Sloan Executive Education

**KIMBERLY JOHNSON** ●  
Editor, The CFO Journal, Wall Street Journal

**ROBERT EDDY**  
EVP & CFO, BJ's Wholesale Club, Inc.

**GINA MASTANTUONO**  
CFO, Ingram Micro

**STEVE PRIEST**  
EVP & CFO, JetBlue

**15**  
MINUTES

## WELCOME TO MIT SLOAN

Grand Ballroom

8:30 AM – 8:45 AM

**ROBERTO RIGOBON**  
Professor of Management & Professor of  
Applied Economics, MIT Sloan

**45**  
MINUTES

MORNING KEYNOTE

## **LEADERSHIP ABCS – ALLOCATING, BALANCING AND CHOOSING**

Grand Ballroom

8:45 AM – 9:30 AM

**THOMAS A. KOLDITZ**  
Director of the Ann and John Doerr Institute  
for New Leaders at Rice University

**30**  
MINUTES

MORNING KEYNOTE

## **A WALK DOWN WALL STREET**

Grand Ballroom

9:30 AM – 10:00 AM

**SCOTT HILL**  
CFO, Intercontinental Exchange (ICE/NYSE)

**ROBERTO RIGOBON**  
Professor of Management & Professor of  
Applied Economics, MIT Sloan

TRACK 2 | DECISION MANAGEMENT

## **THE RIGHT STUFF**

Salons FGH

**PAUL CRISI** ●  
Managing Director & Global Group Head,  
Technology investment banking, UBS

**KEVIN BISSON**  
EVP of Finance & CFO, Ipswitch

**JOHN J. CURRAN**  
SVP & CFO, Cognex Corporation

**JOHN KINZER**  
CFO, Hubspot, Inc.

**CHRIS MALONE**  
CFO, Applause



**1**  
HOUR

1:30 PM – 2:30 PM

TRACK 1 | INFORMATION MANAGEMENT

## CYBERSECURITY: HOW MUCH IS TOO MUCH?

Grand Ballroom

**STEVEN M. RICHARD** •  
Counsel, Nixon Peabody

**APARNA RAMESH, MBA '15**  
CFO, Federal Reserve Bank of Boston

**ANDREW STANLEY**  
CISO, Mars, Inc.

**KRISTIAN P. TALVITIE**  
CFO, Sovos

**SCOTT WARD**  
CFO, Cybereason

TRACK 2 | DECISION MANAGEMENT

## INDUSTRY SCHMININDUSTRY

Salons FGH

**BILL DRISCOLL** •  
President, New England District, Robert Half International, Inc.

**ANTHONY CALLINI**  
EVP & CFO, Monotype Imaging Holdings Inc.

**KIM DRAPKIN**  
CFO, Jounce Therapeutics, Inc.

**SHAN NAIR**  
Principal, Nair Global Investment Fund

**1**  
HOUR

2:30 PM – 3:30 PM

TRACK 1 | INFORMATION MANAGEMENT

## PREDICTIVE ANALYTICS

Grand Ballroom

**ARNOLD BARNETT** •  
George Eastman Professor of Management Science, Professor of Statistics, MIT Sloan

**THACK BROWN**  
General Manager & Global Head of Line of Business Finance, SAP

**STEVE GOLDAPER**  
EVP & CFO, Brooks Bros.

**AMMON MATSUDA**  
Managing Director, Data & Analytics, KPMG

**JOHN NORTH**  
SVP & CFO, Lithia Motors

TRACK 2 | DECISION MANAGEMENT

## STARTING UP

Salons FGH

**DAN ALLRED** •  
Market Manager, Silicon Valley Bank

**MICHAEL BROWN**  
General Partner, Battery Ventures

**BRIAN DAY**  
CFO, Fuze

**MIKE FOLEY**  
CFO, Unity Technologies

**MO GARAD**  
CFO, Turbonomic

**30**  
MINUTES

SPONSORED BY HR KNOWLEDGE

### COFFEE BREAK

3:30 PM – 4:00 PM | Grand Ballroom Foyer

**45**  
MINUTES

4:00 PM – 4:45 PM

AFTERNOON KEYNOTE

## LONG-TERM START-UP SUCCESS

Grand Ballroom

**HELEN GREINER, SB '89, SM '90**  
Founder & CTO, CyPhy Works

**1.5**  
HOURS

### NETWORKING RECEPTION

4:45 PM – 6:15 PM | Grand Ballroom Foyer

**#MITCFO**

◊ INTRODUCTION

• MODERATOR

# AGENDA

THE 15<sup>TH</sup>  
ANNUAL  
MIT  
SLOAN  
CFO  
SUMMIT



# WELCOME TO THE

## THE 15<sup>TH</sup> ANNUAL MIT SLOAN CFO SUMMIT



**JEREMY SEIDMAN, MBA '03**

*Co-Chair, MIT Sloan CFO Summit*

Jeremy is a Managing Director at UBS Financial Services, and joined UBS in 2015 after 10 years at Credit Suisse Private Bank, where he also served on Credit Suisse's Advisory Council, a 14-person leadership team in the Private Bank.

Jeremy graduated cum laude from the University of Pennsylvania, and holds an MBA from the MIT Sloan School of Management with a focus in financial management. In 2003, Jeremy founded the MIT Sloan CFO Summit ([www.mitcfo.com](http://www.mitcfo.com)), the premier forum for corporate finance executives, and continues to serve as chairperson. Jeremy is frequently contacted by members of the media for his insights into business and strategic issues facing the CFO, and has been quoted by *Bloomberg*, *The Wall Street Journal*, and *Boston Business Journal*. Jeremy currently serves on the advisory boards for WGBH, Coaching4Change, and MIT Sloan Boston Alumni Association. Jeremy, his wife, son, and daughter live in Wellesley, and enjoy skiing as often as possible at Loon Mountain in NH.



**JACK McCULLOUGH, MBA '97**

*Co-Chair, MIT Sloan CFO Summit*

Jack is the founder of the CFO Leadership Council, the leading organization for senior financial leaders. This group provides professional development and peer-to-peer networking for chief financial officers in 23 chapters across the country. Formerly, Jack was the director of KPMG's Global Innovation Center in Kendall Square where he worked with early-stage investors, entrepreneurs, and their executive teams to help the venture ecosystem flourish. Prior to working at KPMG, he worked as an executive for more than 25 early-stage companies, raising over \$200 million in capital.

Jack has led fundraising efforts for a wide-range of organizations including Autism Speaks, the MIT Sloan School of Management, and the Wounded Warrior Project. He was a daredevil in a prior life, enjoying such activities as bungee-cord jumping, parasailing, and skydiving. At present, he spends his free time performing extreme fitness programs and with my wife and two sons.

He received an MBA from the MIT Sloan School of Management, focusing on finance and entrepreneurship.

**15**  
MINUTES

**OPENING REMARKS**  
Grand Ballroom | 8:15 AM – 8:30 AM



# WELCOME TO MIT SLOAN



## ROBERTO RIGOBON

*Professor of Management & Professor of Applied Economics, MIT Sloan*

Roberto Rigobon is the Society of Sloan Fellows Professor of Management and a Professor of Applied Economics at the MIT Sloan School of Management. He is also a research associate of the National Bureau of Economic Research, a member of the Census Bureau's Scientific Advisory Committee, and a visiting professor at IESA.

Roberto is a Venezuelan economist whose areas of research are international economics, monetary economics, and development economics. Roberto focuses on the causes of balance-of-payments crises, financial crises, and the propagation of them across countries—the phenomenon that has been identified in the literature as contagion. Currently he studies properties

of international pricing practices, trying to produce alternative measures of inflation. He is one of the two founding members of the Billion Prices Project, and a co-founder of PriceStats.

Roberto joined the business school in 1997 and has won both the “Teacher of the Year” award and the “Excellence in Teaching” award at MIT three times. He received his PhD in economics from MIT in 1997, an MBA from IESA (Venezuela) in 1991, and his BS in electrical engineering from Universidad Simon Bolivar (Venezuela) in 1984. He is married with three kids.

**15**  
MINUTES

Grand Ballroom | 8:30 AM – 8:45 AM

# LEADERSHIP ABCs –

## ALLOCATING, BALANCING AND CHOOSING



## THOMAS A. KOLDITZ

*Director of the Ann and John Doerr Institute for New Leaders at Rice University*

Tom Kolditz is founding Director of the Doerr Institute for New Leaders at Rice University. He designed and directed the core Leader Development Program at Yale School of Management, served as chairman of the Department of Behavioral Sciences and Leadership at West Point, and was the founding Director of West Point Leadership Center. He is titled Professor Emeritus from West Point. A highly experienced leader, Brigadier General (retired) Kolditz has more than 26 years in P&L level supervisory positions, serving on four continents in his 34 years of military service. General Kolditz is a recipient of the Distinguished Service Medal, the Army's second highest award in order of precedence. He is a Fellow in the American Psychological Association and is

a member of the Academy of Management. He serves as a senior advisor to the Future of Executive Development Forum. His book, *In Extremis Leadership: Leading as if Your Life Depended on It*, was based on more than 175 interviews taken on the ground in Iraq during combat operations. He has been named as a leadership Thought Leader by the Leader to Leader Institute and as a Top Leader Development Professional by Leadership Excellence. In 2006, he co-edited and was the lead author in a special issue of the *Leader to Leader* journal, winning the APEX Publishing Award for best magazine or journal in the US. He holds a BA from Vanderbilt University, three master's degrees, and a PhD in social psychology from the University of Missouri.

**45**  
MINUTES

MORNING KEYNOTE  
Grand Ballroom | 8:45 AM – 9:30 AM

**30**  
MINUTES

MORNING FIRESIDE CHAT  
Grand Ballroom | 9:30 AM – 10:00 AM



## SCOTT HILL

*Chief Financial Officer,  
Intercontinental Exchange  
(ICE/NYSE)*

Scott Hill has served as Chief Financial Officer of Intercontinental Exchange, Inc. (ICE/NYSE) since May 2007. He is responsible for all aspects of ICE's finance and accounting functions, treasury, tax, audit and controls, business development, human resources and investor relations. Hill also oversees ICE's global clearing operations.

Prior to joining ICE, Hill was Assistant Controller for Financial Forecasts and Measurements at IBM, where he oversaw worldwide financial performance and worked with all global business units and geographies. Hill began his career at IBM and held various accounting and financial positions in the U.S., Europe, and Japan, including Vice President and Controller of IBM Japan, and Assistant Controller, Financial Strategy and Budgets.

A native of Texas, Hill earned a Bachelor of business administration degree from the University of Texas and completed an MBA at the Stern School of Business at New York University.



## ROBERTO RIGOBON

*Professor of Management & Professor of  
Applied Economics, MIT Sloan*

Roberto Rigobon is the Society of Sloan Fellows Professor of Management and a Professor of Applied Economics at the MIT Sloan School of Management. He is also a research associate of the National Bureau of Economic Research, a member of the Census Bureau's Scientific Advisory Committee, and a visiting professor at IESA.

Roberto is a Venezuelan economist whose areas of research are international economics, monetary economics, and development economics. Roberto focuses on the causes of balance-of-payments crises, financial crises, and the propagation of them across countries—the phenomenon that has been identified in the literature as contagion. Currently he studies properties of international pricing practices, trying to produce alternative measures of inflation. He is one of the two founding members of the Billion Prices Project, and a co-founder of PriceStats.

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Jack Gaziano  
Managing Director, Corporate Finance  
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# CYBERSECURITY FOR THE CFO

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**EVERYTHING A CFO WANTS TO KNOW** about cyber-security – data security depends on managing internal procedures and external data threats with attention and detail. How does a CFO rely on her CTO, CISO and technology partners? How does a CFO know what they know and know what they don't know?

**BITSIGHT****BRIAN COHEN***Chief Financial Officer,  
BitSight Technologies*

Brian is a Chief Financial Officer with a track record of building high-growth businesses and managing rapidly expanding operations in both publicly traded and privately held technology companies.

He is currently the Chief Financial Officer of BitSight Technologies. BitSight is transforming how companies manage information security risk with objective, verifiable and actionable security ratings. Brian has over 30 years' experience as a Chief Financial Officer with many successful liquidity events, including the acquisition of Q1 Labs by IBM, Jumptap by Millennial Media, DynamicOps by VMware, and two companies acquired by Cisco.

Prior to joining BitSight in February 2017, Brian was the Chief Financial Officer for rapidly growing DigitalOcean, where he led an \$83 million equity financing followed by a \$130 million debt transaction. Brian's career spans extensive expertise in finance, administration, M&A, corporate strategy and operations, including significant experience with venture capital and debt financings.

Brian began his career with PwC, during which time he achieved his CPA certification. He is a graduate of the State University of New York at Oswego.

**CYLANCE****MALCOLM HARKINS***Chief Security & Trust Officer,  
Cylance, Inc.*

Malcolm Harkins serves as Chief Security & Trust Officer of Cylance Inc. and previously served as Global Chief Information Security Officer of Cylance Inc. Malcolm is responsible for all aspects of information risk and security, as well as public policy and customer outreach to help improve understanding of cyber risks. He spent 23 years with Intel, most recently as its first Chief Security and Privacy Officer, responsible for managing the risk, controls, privacy, security and other compliance activities for all of Intel's information assets, products and services. Prior to this, he served as Chief Information Security Officer and General Manager of Information Risk & Security at Intel Corporation.

In 2010, he received the RSA Conference Excellence in the Field of Security Practices Award. He is a Fellow with the Institute for Critical Infrastructure Technology, a non-partisan think-tank providing guidance on cybersecurity to the House, Senate and a variety of federal agencies. Malcolm received his BA in economics from the University of California at Irvine and an MBA in finance and accounting from the UC-Davis.



**PHONG LE, MBA '05***Chief Financial Officer,  
MicroStrategy*

Phong Le has served as Senior Executive Vice President & Chief Financial Officer since August 2015. Prior to joining MicroStrategy, Phong served as the Chief Financial Officer of XO Communications, a privately-held telecommunications company, from August 2014 to August 2015. From March 2010 to August 2014, Phong held senior positions at NII Holdings, a NASDAQ-listed telecommunications company, including Vice President of Financial Planning and Analysis, Vice President of Strategy and Business Operations, and Vice President of Strategic Finance. Prior to that, Phong worked in the consulting practice at Deloitte from 1998 to 2010, where he held various positions, including Senior Manager. Phong holds a BS in biomedical engineering from The Johns Hopkins University and an MBA from MIT Sloan School of Management.

**SUMUKH TENDULKAR, MBA '02***Director of Product Marketing,  
IBM Security*

Sumukh Tendulkar is the world wide leader of Product Marketing for IBM Security. In his role, Sumukh is responsible for understanding market trends and for positioning IBM's product portfolio to solve customer's cybersecurity challenges. In his role, Sumukh works closely with security professionals and executives. He has deep experience in CyberSecurity, previously he managed product marketing at RSA Security where he managed the Archer product. He also was the Vice President of Products at Neokami (acquired by relar), where he used AI algorithms to address security and privacy problems.

Sumukh is a well known thought leader and speaker in the topics of cybersecurity and its business value. In addition, he has spoken on topics of marketing and cyber security at the MIT Sloan school of Management. Sumukh has a BS in electrical engineering from University of Mumbai, and an MBA from MIT Sloan School of Management with a focus on new venture and product development.

**• MODERATOR****KERI PEARLSON***Executive Director,  
(IC)<sup>3</sup>*

Keri Pearlson has held positions in academia and industry including Babson College, UTexas-Austin, Gartner's Research Board, CSC, and AT&T. She founded KP Partners, a CIO advisory services firm. She is the Director of the International Institute of Analytics Leadership Consortium. Dr. Pearlson began her career at Hughes Aircraft Company as a systems analyst.

Keri's research spans MIS, business strategy and organizational design. She is the co-author of *Managing and Using Information: A Strategic Approach* (6th ed) and of *Zero Time: Providing Instant Customer Value*. Her work has been published in *Sloan Management Review*, *Academy of Management Executive*, *Information Resources Management Journal* and by *Harvard Business School Publishing*.

Keri holds a Doctorate in business administration (DBA) in MIS from Harvard Business School and an MS in industrial engineering and a BS in mathematics from Stanford. She's the founding President of the Austin Society for Information Management (SIM) and was named "2014 National SIM Leader of the Year".

1  
HOUR

TRACK 2 | DECISION MANAGEMENT  
Salons FGH | 10:30 AM – 11:30 AM

## THE RIGHT STUFF

**BUILDING THE RIGHT DEAL TEAM** is critical to the success of an M&A transaction. How should CFOs think about when and who they bring into the inner circle? This panel comprises the architects of some of the most successful M&A deals in the region.



**ipswitch**

**KEVIN BISSON**

*Executive Vice President of Finance & Chief Financial Officer, Ipswitch*

Kevin joined Ipswitch in 2017, bringing over 30 years of financial leadership experience in mergers and acquisitions and financing growth and expansion plans for high tech companies. Most recently, Kevin was Chief Financial Officer of Dyn where he completed a \$50 million equity financing transaction and was instrumental in the sale of Dyn to Oracle in 2017.

Prior to Dyn, Kevin held Chief Financial Officer roles at three publicly traded technology companies – Mercury Systems, SeaChange International and AMSC. He also spearheaded the initial public offering of Axcelis Technologies. Kevin began his career at United Technologies where he held several senior financial positions. He has a master's degree in finance from the University of Virginia Darden School of Business and a bachelor's degree in accounting from Boston College. Kevin is also a Certified Public Accountant.



**COGNEX**

**JOHN J. CURRAN**

*Senior Vice President & Chief Financial Officer, Cognex Corporation*

John J. Curran has been Chief Financial Officer and Senior Vice President of Finance at Cognex Corporation since February 2017 and September 2016 respectively. John oversees Cognex's Finance, Treasury, Tax, Investor Relations, Legal and Information Technology departments, and joined Cognex after a 21-year career at EMC Corporation, where he most recently served as Senior Vice President of Finance and Corporate Controller. Prior to that, he served as Interim Chief Financial Officer for Pivotal, Inc., a \$200 million subsidiary of EMC focusing on application and data infrastructure software, agile development services and data science consulting. While at EMC, John also led the implementation of a global ERP system that delivered improved visibility into the company's worldwide operations and established an IT foundation for future growth.

He holds a BS in accounting and an MBA from Babson College.



**JOHN KINZER***Chief Financial Officer,  
Hubspot, Inc.*

John Kinzer is Chief Financial Officer at Hubspot, Inc. where he manages the company's finances and played a key role in Hubspot's public offering.

Prior to Hubspot, John served as Chief Financial Officer at Blackboard, Inc., the leading SaaS education company. He played a key role in taking the company public in 2004 and reaching more than \$500M in revenue before being acquired by Providence Equity Partners. John also held leadership roles at MCI and Arthur Anderson LLC.

John serves on the advisory board of the Apex Center for Innovation & Entrepreneurship at Virginia Tech, and has been twice nominated for the Northern Virginia Technology Council CFO of the Year award.

Outside of work, John stays busy spending time with his three daughters, snow skiing, or training for another long charitable cycling event. He holds a BS in accounting from Virginia Tech University.

**CHRIS MALONE***Chief Financial Officer,  
Applause*

As Chief Financial Officer for Applause, Chris is responsible for overseeing the financial strategy, IT, legal and administrative operations for the company. A veteran of the IT Services industry, Chris previously served as Vice President of Finance for NTT DATA. At NTT DATA, Chris held a leadership position overseeing the financial management of the Company's U.S. and Canada Commercial Operations. Prior to NTT DATA, Chris was a Managing Director with a financial consulting firm providing CFO, M&A and Controllershship services.

Since Chris joined the team, Applause has closed a \$47MM Series E financing round led by Goldmann Sachs, more than doubling the company's funding; expanded globally with the acquisition of German crowdtesting company Testhub Germany (now known as Applause EU); and has seen rapid growth leading Applause to be named to Forbes' list of America's Most Promising Companies for three years running. Chris holds both an MBA and a BS from Babson College and is a Certified Public Accountant.

**• MODERATOR****PAUL CRISCI***Managing Director & Global Group Head,  
Technology investment banking, UBS*

Paul is the Global Group Head of UBS's Technology investment banking practice in San Francisco. Previously, he was the Global Joint Head of Technology investment banking at Jefferies. He has 21 years combined experience at Broadview International and Jefferies LLC (Broadview was acquired by Jefferies in 2003).

Over his banking career, Paul has led and advised on over 300 M&A and financing transactions with total volume approaching \$100B. Prior to banking, Paul started his career in sales and marketing for IBM in the late 1980's and then Silicon Graphics.

Paul holds an MBA from Harvard Business School and a BS from University of Maryland College Park.



# Invest in ideas

## Empowering today's CFOs

UBS is proud to sponsor the 15th annual MIT Sloan CFO Summit. We believe investing in learning and thought-provoking discourse about the future of finance, accounting and business is one of the best investments we can make. The theme of creating Calm from Chaos applies to our dedication to you, our CFO clients. To receive a CFO wealth report, please contact:

**Jeremy Seidman**  
Managing Director Wealth Management  
617-247-6120  
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1.25  
HOURS

LUNCHEON KEYNOTE PANEL  
Grand Ballroom | 12:00PM – 1:15 PM

# CFO LEADERSHIP: FROM CHAOS TO CALM

LEADERS ARE OFTEN DEFINED BY THEIR COMPOSURE in the face of uncertainty. Yet, with today's ever-changing business environment, it could be argued that chaos, including opportunities and challenges, is a natural state. Therefore a business leader must not only manage through internal and external choices, but also maintain calm and lead with conviction. Our keynote luncheon speakers will review their strategies for managing through uncertainty, and their solutions for offering clarity and forward progress.

0 INTRODUCTION



MIT  
MANAGEMENT  
EXECUTIVE EDUCATION

## PETER HIRST

Associate Dean,  
MIT Sloan Executive Education

Peter leads the team of professionals who partner with clients and faculty at the MIT Sloan to develop, design, and deliver innovative executive education programs for individuals and companies.

Formerly Chief Executive Officer of the commercialization, consulting, and executive education business of the London School of Economics, he has over 20 years of experience in international strategy, technology consulting and organizational development. He is a past president of the British American Business Council of New England, and is a trustee and treasurer of the American Foundation of the University of St Andrews in Scotland and co-chair of the Education Working Group of the Internet of Things World Forum and a founding member of the Internet of Things Global Talent Consortium.

Peter earned a PhD from the University of St Andrews, Scotland, for research in plasma physics and microwave engineering. After a period of academic entrepreneurship in a variety of related fields, including optoelectronics, neural network computing, and the interfaces between technology and terrorism, he was appointed Westminster Fellow in the UK Parliamentary Office of Science and Technology.

In 2012, Peter was named a Member of the Most Excellent Order of the British Empire (MBE) by Queen Elizabeth II in recognition of his service to British and American business and academia interests.



BJ's

## ROBERT EDDY

Executive Vice President & Chief Financial  
Officer, BJ's Wholesale Club, Inc.

Bob Eddy is Executive Vice President and Chief Financial Officer of BJ's Wholesale Club, Inc. He is responsible for the company's finance, risk management and real estate teams. He also leads the teams charged with pricing and procurement, asset protection, as well as the legal team. Shortly after Bob assumed the role of CFO in 2011, BJ's was taken private by two private equity firms. Bob has led the creation of significant value for shareholders through several financing and structuring transactions, while being a strategic advisor to BJ's CEO and Board of Directors. Bob joined BJ's in 2007 as Senior Vice President, Finance. Bob chairs the Financial Executives Council of the National Retail Federation, advising Chief Financial Officers and other senior finance executives around the retail industry on trends and issues.

Prior to his roles at BJ's, Bob served multinational manufacturing, technology and retail/consumer products companies as a member of the audit and business advisory practice of PricewaterhouseCoopers LLP ("PwC") in Boston and San Francisco. Bob is also a member of the Board of Trustees of The Boston Children's Hospital Trust and a member of the Board of Directors of BJ's Charitable Foundation.

Bob is a graduate of Babson College in Wellesley, Massachusetts, and Phillips Academy in Andover, Massachusetts.



**GINA MASTANTUONO**

*Chief Financial Officer,  
Ingram Micro*

Gina Mastantuono serves as Chief Financial Officer of Ingram Micro Inc., and is responsible for the company's global finance organization, including financial planning and analysis, financial operations, controllership, internal audit, tax, treasury and risk management, investor relations, and global business processes.

Prior to earning her promotion to CFO, was Executive Vice President, Finance. She joined the company in April 2013 from Revlon Inc., where she served most recently as Senior Vice President, Chief Accounting Officer, Controller, and International Chief Financial Officer where she was responsible for managing all aspects of external reporting, financial planning and analysis, corporate accounting, and international finance.

Before Revlon, Gina held various finance executive roles, including 4 years with InterActive Corp., and 4 years with Triarc Companies, Inc. She began her career at Ernst & Young, LLP in New York, where she was a manager in the entrepreneurial services group.

The National Diversity Council has named her one of the Top 50 Most Powerful Women in Technology the last two years. She is a certified public accountant with more than 20 years of finance experience.

Gina attended the State University of New York at Albany, where she earned a bachelor's degree in accounting and business administration.

**STEPHEN J. PRIEST**

*Executive Vice President & Chief  
Financial Officer, JetBlue*

Steve Priest has been Executive Vice President and Chief Financial Officer at JetBlue Airways Corporation since February 2017. Previously, he served as an Advisor of JetBlue Technology Ventures. He served as Vice President of Structural Programs at JetBlue Airways Corporation from August 2015 to February 2017. Prior to this, he served as a Senior Vice President at British Airways where he was responsible for the carrier's transatlantic joint business with American Airlines, Iberia and Finnair.

He currently oversees treasury, investor relations, corporate tax, audit, accounting, financial planning and analysis, fuel hedging, aircraft and materiel programs, insurance, financial reporting, risk management, infrastructure and strategic sourcing. He was responsible for leading many of JetBlue's large-scale strategic and structural initiatives. He plays a critical cross-functional role assisting JetBlue in identifying new opportunities to drive key structural improvements and greater efficiency while balancing the needs of its customers and crewmembers.

Steve has 20 years of career experience and has held a variety of leadership roles in strategy and planning, commercial, finance and operations in London, New York and Paris. He is a qualified Chartered Global Management Accountant. He holds a graduate degree in geography with economics from University of Manchester — Manchester Business School.



● MODERATOR

**KIMBERLY JOHNSON**

*Editor, The CFO Journal  
The Wall Street Journal*

Kimberly is Editor of the *CFO Journal*, which focuses on coverage of corporate finance and issues that confront finance executives. Kimberly has two decades of journalism experience, spanning print, online, broadcast and radio. Prior to joining *The Wall Street Journal* in 2014, she spent five years covering financial activity in sub-Saharan Africa for various publications including the *Financial Times*, *Global Post*, and *The Africa Report* magazine. She previously wrote about the auto industry for *The Associated Press* in Detroit, where she covered the bankruptcy protection filings of General Motors and Chrysler. Before moving to Detroit, Kimberly was a business reporter at the *Denver Post*, where she covered retail, technology, telecommunications, and biotech. She also worked at the *New Haven Register*, *The Boston Globe* and CNN. She holds a bachelor's degree in broadcast journalism and a master's degree in business and economics journalism from Boston University's College of Communication.

1  
HOUR

TRACK 1 | INFORMATION MANAGEMENT  
Grand Ballroom | 1:30 PM – 2:30 PM

# CYBERSECURITY: HOW MUCH IS TOO MUCH?

.....

**OF COURSE, YOU ARE GOING TO INVEST IN CYBER-SECURITY**, but is it possible to allocate too many dollars and resources? This panel will examine how CFOs evaluate the decision as to how much risk they are willing to take.



Federal Reserve  
Bank of Boston

## APARNA RAMESH, MBA '15

*Chief Financial Officer,  
Federal Reserve Bank of Boston*

Aparna Ramesh is Chief Financial Officer of the Federal Reserve Bank of Boston, having previously served as Vice she served as vice president in the Financial Support Office, where she led a number of financial management initiatives across the Federal Reserve System, spanning all 12 Federal Reserve Banks. Prior to coming to the Federal Reserve 10 years ago, she was in Banking (M&T Bank and Cambridge Savings Bank). Over her career, she has held roles spanning product management, treasury, regulatory reporting, corporate finance, strategy, and asset-liability management. Aparna presents routinely on a variety of finance topics and is deeply interested in finding ways in which finance, analytics and fintech can positively improve social pain points. She serves on the board of a non-profit, BEST Corporation that is focused on better jobs.

Aparna has earned an MBA from the MIT Sloan School of Management, an MS in finance from the Rochester Institute of Technology, and integrated masters in engineering, economics and management from the Birla Institute of Technology. Aparna also has a diploma in banking from the National School of Banking. She is a Fellow of the 2017 class of the Aspen Finance Leaders Fellowship and a member of the Aspen Global Leadership Network.



MARS  
incorporated

## ANDREW STANLEY

*Chief Information Security Officer,  
Mars, Inc.*

Andrew Stanley is Chief Information Security Officer of Mars, Inc., a global manufacturer of confectionery and pet food, as well as other food products. Previously, he served as the Chief Information Security Officer for Philips, a global healthcare and consumer lifestyle company. Andrew has a deep background in cybersecurity, which started in his pre-university years designing one-way hashing algorithms. Prior to this role, Andrew served as Vice President, Enterprise Operations where he led a 4,000 person global team responsible for delivering operations services across 124 countries.

Prior to joining Philips, Andrew served as Vice President of Global Infrastructure Development at MWV; where he helped lead and implement cutting-edge cloud services, enhanced strategic discipline, and generated long-term savings in excess of \$60MM per year.

Andrew holds an MBA from the University of Virginia and enjoys spending time with his wife and two daughters, cycling, and exploring rural Maine.



**SOVOS****KRISTIAN P. TALVITIE***Chief Financial Officer,  
Sovos*

As Chief Financial Officer at Sovos, Kristian oversees financial operations for the global compliance software leader. A 20-year veteran of finance, sales, marketing, communications and operations with various technology companies, Kristian has held various leadership roles including Corporate Vice President of Finance at PTC's and vice president of marketing and market sector vice president at Plexus. During his time at PTC, Kristian led the organization's 1500 BPS improvement in operating margins and its \$100 million reduction in operational expenses. Under his guidance, PTC saw its market cap grow by \$1.5 billion. Kristian has a BA in psychology from Allegheny College and an MS in management from Boston University Brussels.



  
**cybereason**
**SCOTT WARD***Chief Financial Officer,  
Cybereason*

Scott Ward is the Chief Financial Officer at Cybereason where he is responsible for all finance, accounting and administrative matters. Scott has extensive hands-on experience in financial and operational management for venture-backed startups and growth companies looking to achieve global scale. Most recently Scott led all finance and administrative functions at Nanigans, a leader in the Advertising Automation space. Scott holds a BA in economics from Middlebury College.



  
**NIXON  
PEABODY**

● MODERATOR

**STEVEN M. RICHARD***Counsel,  
Nixon Peabody*

Steven Richard is a highly experienced trial and appellate lawyer who handles complex commercial, privacy, employment and higher education cases throughout the federal and state courts of Rhode Island, Massachusetts and Connecticut. Steve represents diverse institutional clients, including financial service organizations and governmental bodies, in trials, arbitration, appeals and other dispute resolution procedures. In his privacy practice, he has acquired a deep understanding of federal and state laws and regulations, data management best practices, data security policies, data breach response protocols, and electronic discovery issues. Steve is a key member of the firm's Data Privacy & Cybersecurity team and serves as the co-editor of the firm's privacy blog. He is a frequent lecturer at data security conferences and gives trainings and presentations to the firm's clients addressing privacy issues.

1  
HOUR

TRACK 2 | DECISION MANAGEMENT  
Salons FGH | 1:30 PM – 2:30 PM

# INDUSTRY SCHMINDUSTRY

OF COURSE, INDUSTRY EXPERTISE PLAYS A ROLE.

But a CFO's role is also to look more broadly at the organization, taking a holistic view. As such, should an executive search committee favor a CFO with 20 years of Software or Medical Device experience? Or is it more important that candidates understand general business drivers, operational processes and financial levers?



## Monotype

### ANTHONY CALLINI

*Executive Vice President & Chief  
Financial Officer, Monotype Imaging  
Holdings Inc.*

Anthony (Tony) Callini joined Monotype in 2017 and is responsible for advancing Monotype's financial performance, strategy, operations and EBITDA growth, while also evolving and executing the company's strategic and operational business plans. Previously he served as Senior Vice President of Finance at Avid Technology, Inc. from 2013 to 2016. His background includes extensive financial and operational leadership experience including from 2004 to 2013 he held a number of financial leadership positions at Open Solutions, Inc., a high-growth publicly traded software and services company, most recently as the Senior Vice President, Finance and Treasurer. Prior to Open Solutions, Tony held financial leadership positions with Ernst & Young LLP and Arthur Andersen LLP.



### KIM DRAPKIN

*Chief Financial Officer,  
Jounce Therapeutics, Inc.*

Kim Drapkin brings to Jounce more than 20 years of experience working with private and publicly traded biotechnology and pharmaceutical companies, including building and leading finance functions, raising capital, and leading strategic financial planning. She has worked with Jounce since its inception, playing a key role in building Jounce's financial infrastructure, and comes into this role with an already deep understanding of Jounce's strategy and culture.

Prior to joining Jounce, Kim owned a financial consulting firm where she served as the Interim Chief Financial Officer for numerous early-stage biotechnology companies, including Jounce, Eleven Biotherapeutics, Inc., NinePoint Medical, Inc., Blueprint Medicines Corporation, Warp Drive Bio LLC, Edimer Pharmaceuticals and Voyager Therapeutics, Inc. Previously, Kim was Chief Financial Officer at EPIX Pharmaceuticals. Additionally, she spent ten years in roles of increasing responsibility within the finance organization at Millennium Pharmaceuticals. Kim began her career in the technology and life sciences practice at PriceWaterhouseCoopers.





## SHAN NAIR

*Principal,  
Nair Global Investment Fund*

Dr. Shan Nair runs his own investment fund committed to helping innovative technology companies get off the ground and become business viable.

Shan is an entrepreneur who co-founded Nair & Co., a consulting firm he and his wife bootstrapped from a 2-person start-up to a global enterprise with 700 employees in offices across six countries, which he then sold to a private equity firm in 2013.

He was the first to spot and develop a market niche providing one-stop shopping for small- and medium-sized US technology companies seeking international expansion. In the process he worked with companies in their early stages who have since become household names such as Tesla Motors, FaceTime and Sonus Networks.

Shan has a doctorate in nuclear physics from the University of Oxford. He has received multiple recognitions for his contributions to business in the US, UK and India.



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• MODERATOR

## BILL DRISCOLL

*President, New England District,  
Robert Half International, Inc.*

Bill is the New England District President and is based in Robert Half's Boston office. He oversees professional staffing services for RHI's 23 offices throughout Massachusetts, New Hampshire, Maine, Connecticut, Rhode Island and Upstate New York. Bill began his career with the company in 1992 in the Boston office where he consistently ranked among RHI's top 10 salespeople worldwide. Promoted to Area Manager in 1996, he transferred to Atlanta and soon increased RH's presence in Georgia from one office to seven statewide. He then became a Regional Manager in 1998 and only three years later took on the highly visible role of District President over all of the company's operations in North and South Carolina, Georgia and Jacksonville, Fla. He returned to Boston as New England District President in January of 2006.

Bill serves as a national spokesperson for Robert Half and has been featured in several top publications, including *The Wall Street Journal* and *The Boston Globe*. He has also made appearances on local and national networks, including WFXT, WBZ, WCVB, NECN, PBS, and Fox Business News. Bill is considered a local expert on the staffing industry, commenting on recruiting practices, hiring trends, and other workplace issues.

A graduate of Middlebury College, Driscoll holds bachelor's degrees in history and spanish. Bill, his wife Laurel and their three children reside in Lexington, MA.

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1  
HOUR

TRACK 1 | INFORMATION MANAGEMENT  
Grand Ballroom | 2:30 PM – 3:30 PM

# PREDICTIVE ANALYTICS

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## CFOs NEED TO OWN THE FORECAST PROJECTIONS

across their companies. What are the best ways to use today's data to make tomorrow's decision? Advances in information technology, in theory, can make predicting future results easier, but financial executives can easily find themselves buried with data, when sometime good old-fashioned common sense and intuition is all that is needed.



### THACK BROWN

*General Manager & Global Head of  
Line of Business Finance, SAP*

In his role as General Manager and Global Head for SAP's Line of Business Finance, Thack is responsible for the full suite of SAP's solutions for the Office of the Chief Financial Officer. He has held several roles at SAP, most recently as the Head of Consulting Services for the US. In this role, he was responsible for the Sales and Delivery teams managing the implementation, adoption and value realization of SAP's products. Prior to his time in consulting, he was the Chief Operating Officer for SAP Americas, where he was responsible for industry and solutions, value engineering, sales operations, and the GCO University program (formerly SAP® Sales University), as well as audit and private equity business development, ensuring operational excellence through service efficiency and effectiveness.

Thack joined SAP Latin America and the Caribbean in 2008 from Electronic Data Systems (EDS) in Latin America, where he was Chief Financial Officer. He also held several leadership positions at EDS, including sales director for Brazil and portfolio executive for Latin America, as well as several global roles.

Fluent in English, Spanish, and Portuguese, Thack has lived, worked, and studied around the world. He holds a BS/BA in economics from Appalachian State University in Boone, North Carolina and an international MBA with specialization in finance from the University of South Carolina.



### STEVE GOLDAPER

*Executive Vice President & Chief  
Financial Officer, Brooks Bros.*

Steve is a 28 year veteran of specialty retailing, having started his retail career in 1989 at Ann Taylor, Inc., where he held positions in finance, store operations, and merchandise planning and control. He Joined Brooks Brothers Group (formerly Casual Corner Group) in 1997, where he has held the positions of accounting manager, finance director, Vice President controller, and now Chief Financial Officer.

As Chief Financial Officer, Steve is responsible for overseeing the financial operations of the Company, and for providing strategic insights on Company trends, and developing high level business strategy and tactical execution plans. In addition, he has been a key player in Brooks Brother's transformation into a Global Omni-Channel Brand.

Steve is married, has one adult daughter, enjoys golfing, and spending weekends on his boat visiting the various ports of Long Island Sound.



**AMMON MATSUDA**

*Managing Director, Data & Analytics,  
KPMG*

Ammon is a director and domain leader within KPMG's Data & Analytics center of excellence. He has worked in the strategy and analytics environment for 14 years, initially as a consultant in economic litigation consulting with Charles River Associates (CRAI), a C-level management consultant with McKinsey & Company, and then as a strategy and supply chain executive with WhiteWave Foods (WWAV), before joining KPMG.

He has extensive experience helping companies design and implement new operating and management models based on data and research, and driving innovative transformation through, analytics-driven insights across multiple industries including retail, telecom, consumer goods, and transportation, influence and change management at Fortune 20 companies, and translating strategic thinking into practical, sustainable management decisions within finance and supply chain as well as organizational design.

Ammon specializes in driving a unique blend of strategic thinking and analytics, applied within the context of organizational strategy and operational transformation.

He received an MBA from Northwestern University's Kellogg School of Management, focusing on decision science, analytical consulting, and strategy. He earned a BS in economics at Brigham Young University, focusing on econometrics.

**JOHN NORTH**

*Senior Vice President & Chief  
Financial Officer, Lithia Motors*

John serves as Senior Vice President and Chief Financial Officer at NYSE-listed Lithia Motors, the 4th largest automotive retail group in the United States and a Fortune 500 company (#318). He previously held the role of Vice President of Finance since 2010 and Chief Accounting Officer since 2015. John joined Lithia in 2002 and throughout his tenure he has rigorously applied continuous improvement to accounting, tax, and external reporting. In his role as Chief Financial Officer, John oversees corporate finance, investor relations and risk management, as well as accounting, tax and external reporting. Before joining Lithia, he worked for real estate and technology companies in the San Francisco area. John graduated from Santa Clara University with a degree in Finance. He is a licensed CPA in Oregon and a CFA® charterholder.



• MODERATOR

**ARNOLD BARNETT**

*George Eastman Professor of  
Management Science, Professor of  
Statistics, MIT Sloan*

Arnold Barnett is the George Eastman Professor of Management Science and a Professor of Statistics at the MIT Sloan School of Management.

His research specialty is applied mathematical modeling with a focus on problems of health and safety. Arnold's early work on homicide was presented to President Gerald Ford at the White House, and his analysis of U.S. casualties in Vietnam was the subject of a column by William F. Buckley.

Arnold has written op-ed pieces for *The New York Times*, *The Wall Street Journal*, *The Boston Globe*, *CNN Opinion*, the *Charlotte Observer*, and *USA Today*. He received the President's Award and the Expository Writing Award from INFORMS in 1996 and in 2001, and is a Fellow of INFORMS. Cited as "the nation's leading expert on aviation safety," Arnold was recognized with the 2002 President's Citation from the Flight Safety Foundation for "truly outstanding contributions on behalf of safety." MIT Sloan students have honored him on 14 occasions for outstanding teaching.

Arnold holds a BA in mathematics from Columbia College and a PhD in mathematics from MIT.

# STARTING UP

RAISING CAPITAL GETS MORE CHALLENGING for startups. Investor interest remains strong for those right industries, but the bar has been raised to acquire growth capital. How should CFOs prepare their companies for this paradigm shift?

**MICHAEL BROWN**

General Partner,  
Battery Ventures

Michael serves on the boards of IDI Direct Insurance (TASE: IDIN), J. Hilburn, Joor, KeyMe, Mendix, Newforma, Nitro Software, Panjiva, Q2ebanking (NYSE: QTWO), RiskIQ, Vidyad and Xenex. In addition, he has been actively involved with Battery's investments in Bluestem Brands (acquired Capmark Financial Group), ChemConnect (acquired by InterContinental Exchange), ExactTarget (NYSE: ET, acquired by Salesforce.com), The London International Financial Futures and Options Exchange (LIFFE) (acquired by Euronext), MRU Holdings, Neolane (acquired by Adobe), OutlookSoft Corporation (acquired by SAP), ServiceTitan and TradeKing (acquired by Ally Financial).

From 1996 to 1998, Michael was a member of the high-technology group at Goldman, Sachs & Co., where he worked on debt and equity financings as well as mergers and acquisitions. Previously, he was a financial analyst within Goldman's financial-institutions group. There he focused on mergers and acquisitions within asset management, insurance, specialty finance and retail/mortgage banking. Michael graduated magna cum laude from Georgetown University with a dual BS in finance and international business.

**BRIAN DAY**

Chief Financial Officer,  
Fuze

As Chief Financial Officer, Brian leads financial strategy, planning, and operations for Fuze. Brian has a 25 year track record as a successful financial leader and operator at high-growth companies, most recently at Apperian where he served first as Chief Financial Officer, and then President and Chief Executive Officer through its sale in 2016.

Prior to Apperian, Brian held financial and operational leadership roles at Goal.com, Gomez, Inc., and Octave Communications. He began his career with Fleet Financial Group as a Vice President in the Bank's structured finance group.

Brian has a BA in economics from the University of New Hampshire, and a JD from Suffolk University Law School in Boston.

Outside of work, Brian is an avid sailor and skier and has even been known to show up at a triathlon or two.



**MIKE FOLEY***Chief Financial Officer,  
Unity Technologies*

Mike Foley brings more than 20 years of financial leadership experience to his role as Chief Financial Officer at Unity Technologies, a high-performance end-to-end development platform used to create more than 70% of all VR and AR content. As Chief Financial Officer, he was instrumental in raising \$180M in primary capital and more than \$120M in secondary capital from top tier investors including Sequoia, DFJ Growth, and CIC.

Prior to joining Unity in 2015, Mike led strategic planning and M&A transactions for Electronics Arts in the role of Senior Vice President. He worked for Microsoft as Director of Corporate Development before that. Earlier in his career, Mike held positions with Sovereign Capital, Ernst & Young, and Price Waterhouse.

Mike holds a masters degree from Cambridge University and an MBA from Harvard Business School. He also holds an honorary doctorate of engineering degree from Glasgow Caledonia University and is qualified by the Institute of Chartered Accountants of Scotland.

**MO GARAD***Chief Financial Officer,  
Turbonomic*

Mo brings over 15 years of financial management and business strategy experience to Turbonomic where as Chief Financial Officer he is responsible for finance and operations. Previously, Mo was Chief Financial Officer of dynaTrace, an application performance management software company acquired by Compuware for \$265 million in July 2011, where he was the first U.S. employee and helped grow the business from less than a million dollars in revenue to a run rate of \$32 million in four years. Mo also held executive roles at Bain Capital Ventures and VERITAS Software, which he joined after the acquisition of Precise Software.

**DAN ALLRED***Marketing Manager,  
Silicon Valley Bank*

● MODERATOR

Dan Allred is a Market Manager with Silicon Valley Bank. In this role, he leads a team of bankers working with hundreds of technology companies in Boston. Dan moved to Boston in 2007 to build SVB's Accelerator practice which consists of advising, banking and lending to early-stage, high growth technology start-ups.

Prior to moving to Boston, Dan led SVB's business development efforts in Research Triangle, NC, where he led a team that tripled that office's loan volume between mid-2003 and mid-2007. Dan joined SVB as an associate in the Research Triangle office in September 2002. Dan was Vice President of the Council for Entrepreneurial Development (CED) in Research Triangle Park, NC prior to joining SVB.

Dan currently serves on the Board of Directors of the SVB Foundation, which makes grants to various organizations in the communities that SVB serves.

Dan is a graduate of the University of North Carolina at Chapel Hill, where he was a Johnston Scholar and Phi Beta Kappa. He lives in Wellesley, MA with his wife and two daughters.

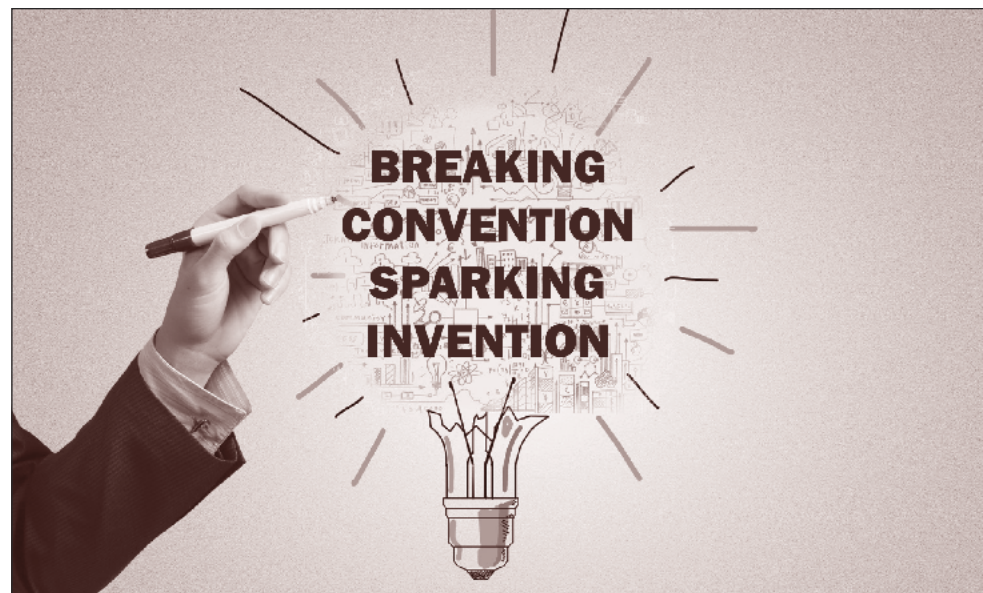


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AFTERNOON KEYNOTE  
Salons FGH | 4:00 PM – 4:45 PM

# LONG-TERM START-UP SUCCESS

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**HELEN GREINER**, founder and CTO of CyPhy Works, a leading drone company, and iRobot co-founder will share her insights on the impact of near-in decisions on long-term results. And vice versa — how long-term goals inform near-in decisions. For example, how do leaders balance technological prowess with ease-of-use? Weigh speed-to-market against product adoption cycles? CyPhy Works is a start-up specializing in small drones for the consumer, commercial and military markets.



**HELEN GREINER, SB '89, SM '90**

Founder & Chief Technical Officer,  
CyPhy Works

Helen Greiner is known for both innovation, and for business strategy in the field of robotics. She is the Founder of CyPhy Works, a leading drone company delivering aerial platforms to defense, security, public safety, and commercial markets. Co-founding iRobot (NASDAQ:IRBT) in 1990, She served as President until 2004, and Chairman until 2008. During her tenure, Helen guided iRobot into its position as a global leader with the release of the Roomba™, the PackBot™, and SUGV Military Robots. She built a culture of practical innovation and delivery that led to the deployment of over 6,000 tactical robots with our troops and over 15M home robots worldwide. In addition, Helen led iRobot's financing efforts, raising \$35M in venture capital for a \$75M initial public offering.

Helen holds a bachelor's degree in mechanical engineering and a master's degree in computer science, both from MIT. She also holds an honorary degrees from Worcester Polytechnic Institute (WPI) and Clarkson University.

## Accolades

- *Member, National Academy of Engineering, recognized for leadership in the design, development, and application of practical robots. (ongoing)*
- *Named one of America's Best Leaders by the Harvard Kennedy School in conjunction with S. News and World Report*
- *"Innovator for the Next Century" by The Review Magazine*
- *Global Leader of Tomorrow and Young Global Leader by World Economic Forum*

- *Prestigious Pioneer Award from the Association for Unmanned Vehicle Systems International (AUVSI)*
- *DEMO God Award and DEMO Lifetime Achievement Award*
- *New England Entrepreneur of the Year by Ernst and Young*
- *Inducted in the Women in Technology International (WITI) Hall of Fame*

## Service

- *Visiting Committee Member, MIT Media Lab (present)*
- *Presidential Advisor for Global Entrepreneurship (PAGE) for President Obama and Secretary of Commerce 2014–present*
- *Trustee Boston Museum of Science (MOS) 2008–present*
- *Trustee Massachusetts Institute of Technology (MIT) 2007–2013*
- *President of the Robotics Technology Consortium (RTC) 2008–2012*
- *Trustee of the National Defense Industrial Association (NDIA)*
- *Board of Visitors of the U.S. Army War College (AWC) 2010–2013*
- *Army Science Board (ASB) 2007–2013*



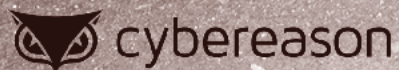


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