

The 17th Annual MIT Sloan CFO Summit November 21, 2019

#### THE DURABILE **CFO**:

Results & Reinvention

# FRIENDS,

# Welcome to the 17th Annual MIT Sloan CFO Summit!

Should CFOs be focused on today's operations or tomorrow's innovation—steady play or strategic change? The answer, of course, is yes.

Which brings us to our theme, "THE DURABLE CFO: RESULTS & REINVENTION." Leaders who remain flexible will be equipped to move their companies forward and motivate the organization to achieve new feats, as well as enforce the discipline needed to stay the course.

We are delighted to open the conference with MEASURING RETURNS TO SOCIAL ADVERTISING with Dr. Sinan Aral, the David Austin Professor of Management at MIT. Sinan's research has shown that CFOs must master their company's social media strategy. We also look forward to #DURABLECFO: Fireside Chat with Sinan and Twitter's Ned Segal, as they explore the company's decision-making process with a long-term view towards resource allocation, employee engagement, and customer focus.

Our morning keynote will be **LEADERSHIP: LETTERS TO MY YOUNGER SELF** with Cameron Herold, Founder of the COO Alliance. Cameron will share with us lessons he learned as a founder of 1-800-GOT-JUNK, which he built from a \$2 million to \$106 million company.

Our keynote panel, LEADERSHIP IN THE DIRECT TO CONSUMER EVOLUTION, includes CFOs from Diageo, Etsy, and Peloton, led in conversation by Nina Trentmann of the Wall Street Journal. These visionary leaders understand that just as consumers continue to lead our economy, so too can their companies continue to lead by focusing on their customers. You are sure to be impressed by their strategies for innovating the landscape, growing market share and reinventing competitive position.

Our breakout panels today are organized along two tracks—one track looks at **RESULTS**: how does a CFO make tangible success in their organization; build a repeatable M&A process; plan for unforeseen scenarios; and adjust to the ever-changing workforce. The second track offers perspectives on **REINVENTION**: how a CFO helps the broader company negotiate for win-win scenarios; how a CFO makes operational changes outside the direct scope of finance; and how a CFO is impacted by the importance of data.

We always like to end the formal portion of our conference with a look at a dramatically changing or new industry. This year we focus on transportation.

Moderator Dr. Chris Knittel, George P. Schultz

Professor of Applied Economics, MIT Sloan, will lead a conversation with the CFOs of GM Cruise and Lime—driverless cars and car-less drivers. These panelists will share their perspectives on the transportation industry—exploring autonomous driving, micro mobility electric scooters, and bike sharing. The fireside chat,

DRIVING THE ROAD OF THE FUTURE will discuss the new market opportunities and impacted technologies.

After this discussion, please join us as we close out the conference with our Networking Reception—a chance to say hello to new names and old friends over drinks, heavy appetizers and light dessert.

This event would not be possible without 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 thank you to these volunteers.

We are also honored to be supported by a wonderful group of sponsors. The reputation and value of the CFO Summit attract many outstanding organizations. This enables us to partner with thought leaders in their respective industries. Without their 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 all of our sponsors. Our gold level sponsors are Adaptive Insights, McKinsey & Company, Silicon Valley Bank, UBS, and Wilmer Hale. Our silver sponsors are CGMA, HR Knowledge, KPMG, Lola.com, and Robert Half. And finally, MIT Sloan Executive Education is our networking sponsor.

Thank you for attending; an exciting and educational day is ahead. Learn much, network well, and by all means, have fun!



JEREMY SEIDMAN MBA '03

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The success of this Summit is a direct result of the timeless dedication of the following people:

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Chair, MIT Sloan CFO Summit

#### RISTIN TODD

Marketing Director, MIT Sloan CFO Summit

#### MANDY ZHU MF

Strategic Finance, ETQ

7:30 AM - 8:15 AM

Grand Ballroom Foyer

#### REGISTRATION AND CONTINENTAL BREAKFAST

8:15 AM - 8:30 AM

Grand Ballroom

#### OPENING REMARKS

JEREMY SEIDMAN MBA '03 Chair, MIT Sloan CFO Summit

8:30 AM - 9:00 AM

WELCOME TO MIT SLOAN Grand Ballroom

#### MEASURING RETURNS TO SOCIAL **ADVERTISING**

SINAN ARAL MIT PHD '07 David Austin Professor of Management, MIT Sloan

9:00 AM - 9:30 AM

MORNING FIRESIDE CHAT Grand Ballroom

#### #DURABLECFO: Fireside Chat with

SINAN ARAL MIT PHD '07 David Austin Professor of Management, MIT Sloan

NED SEGAL

Chief Financial Officer, Twitter

9:30 AM - 10:00 AM

MORNING KEYNOTE Grand Ballroom

**LEADERSHIP:** Letters to My

CAMERON HEROLD Founder. COO Alliance 10:00 AM - 10:30 AM

Grand Ballroom Foyer

MORNING COFFEE BREAK

10:30 AM - 11:30 AM

FINANCE 2.0: Building a

**m** DEV PATEL

Partner, McKinsey and Company

SETH BAGSHAW

Senior Vice President, Chief Financial Officer & Treasurer, MKS Instruments. Inc.

BRIAN GLADDEN

Operating Partner, Bain Capital, LP

CHRISTOPHER MONTGOMERY

Managing Director, Head of Software, Americas, UBS

KEN STILLWELL

Senior Vice President, Chief Financial Officer & Chief Administrative Officer, Pegasystems Inc.

TRACK 2: RESULTS Salons FGH

**NEGOTIATION 2.0:** Driving the Entire Team to Think Differently

**BRUNO VERDINI**, PHD

Executive Director, MIT Harvard Mexico Negotiation Program

KOURTNEY CORCORAN

Senior Vice President & Chief Financial Officer, Legal Sea Foods

LUCY MCQUILKEN

Chief Financial Officer, WHOOP™

ROBERT NEALON

District President, Professional Staffing Services, Robert Half

STEVE WEBBER

Chief Financial Officer. Carbon Black

11:30 AM - 12:00 PM

Sponsored by MIT Sloan Executive Education Grand Ballroom Fover

LUNCHEON BUFFET

12:00 PM - 12:15 PM

Grand Ballroom

LUNCHEON KEYNOTE PANEL INTRODUCTION

DALTON PERRAS

Associate Director, Corporate & Affiliate Marketing, MIT Sloan Executive Education

12:15 PM - 1:15 PM

LUNCHEON KEYNOTE PANEL Grand Ballroom

LEADERSHIP IN THE DIRECT TO CONSUMER EVOLUTION

NINA TRENTMANN

News Editor, CFO Journal, The Wall Street Journal

LAVANYA CHANDRASHEKAR

Chief Financial Officer, Diageo North America

RACHEL GLASER

Chief Financial Officer, Etsy

JILL WOODWORTH SB '94

Chief Financial Officer, Peloton Interactive

1:30 PM - 2:30 PM

#### SCENARIO PLANNING: Green. Yellow $\mathcal{E}Red$

GEORGE W. SHUSTER. JR.

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DAN ALLRED

Senior Market Manager, Silicon Valley Bank

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BARRY KALLANDER

President and Founder, KallanderGroup, Inc.

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W KEN BETTENHAUSER

President & Managing Director, HR Knowledge

AVNER APPLBAUM

Chief Financial Officer, Double E Company, LLC

AMANDA DUGUAY

Chief Financial Officer, Profitect (now part of Zebra Technologies Corp.)

REBECCA MORRISON

Vice President of Finance and Operations, Lola.com

SARAH ROMANO

Chief Financial Officer, EyeGate Pharmaceuticals

2:30 PM - 3:30 PM

TRACK 1: REINVENTION Grand Ballroom

#### WORKPLACE FOR THE FUTURE: Reinventing Technology, Processes, and People

M ASH NOAH

Managing Director, CGMA's Learning & Educational Development, American Institute of CPAs (AICPA)

JAWAD AHSAN MBA '14

Chief Financial Officer, Axon

TAMMY MARTIN

Chief Financial Officer, Seeg Corporation

EVAN METTER

Principal, KPMG US

SHAN NAIR, PHD President, Nucleus

TRACK 2: RESULTS Salons FGH

#### MONEYBALL FOR THE CFO

W VIVEK F. FARIAS

Patrick J. McGovern Professor of Operations Management, MIT Sloan

MARY JEFTS

Chief Financial Officer, Salsify

KERMAN LAU

Vice President of Finance, Adaptive Insights

MIKE MOZZER

Chief Financial Officer, TraceLink

TIM ZUE AB '99

Executive Vice President & Chief Financial Officer, Boston Red Sox

#### George P. Shultz Professor of Applied Economics, MIT Sloan

CHRISTOPHER KNITTEL

3:30 PM - 4:00 PM

Grand Ballroom Fover

4:00 PM - 4:45 PM

COFFEE BREAK

GEOFFREY RICHARDSON Chief Financial Officer. Cruise Automation

AFTERNOON KEYNOTE Grand Ballroom

DRIVING THE ROAD OF THE

TED TOBIASON

FUTURE

Chief Financial Officer, Lime

4:45 PM - 6:15 PM

Grand Ballroom Foyer

NETWORKING RECEPTION

The 17th Annual MIT Sloan CFO

m MODERATOR

#MITCFO A 5



8:30 AM - 9:00 AI GRAND BALLROOM

WELCOME TO MIT SLOAN



#### MANAGEMENT SLOAN SCHOOL

#### SINAN ARAL MIT PHD '07

David Austin Professor of Management, MIT Sloan

Sinan Aral is the David Austin Professor of Management at MIT, where he is a Professor of IT & Marketing, and Professor in the Institute for Data, Systems and Society where he co-leads MIT's Initiative on the Digital Economy.

He was the chief scientist at SocialAmp, one of the first social commerce analytics companies (until its sale to Merkle in 2012), and at Humin, a social platform that the *Wall Street Journal* called the first "Social Operating System" (until its sale to Tinder in 2016). He is currently a founding partner at Manifest Capital and on the Advisory Board of the Alan Turing Institute, the British National Institute for Data Science, in London. Sinan was the scholar-in-residence at the New York Times R&D Lab in 2013, and has worked closely with Facebook, Twitter, Snap, Airbnb, Yahoo, Jet.com, Microsoft, IBM, Intel, Cisco, Oracle, SAP, and many other leading *Fortune* 500 firms on realizing business value from big data analytics, social media, and IT investments.

Professor Aral's research has won numerous awards including the Microsoft Faculty Fellowship, the PopTech Science Fellowship, an NSF CAREER Award, and a Fulbright Scholarship. In 2014, he was named one of the "World's Top 40 Business School Professors Under 40" by *Businessweek*.

He is a Phi Beta Kappa graduate of Northwestern University, holds Master's degrees from the London School of Economics and Harvard University, and received his PhD from MIT.

He enjoys cooking, skiing, and telling jokes about his own cooking and skiing. His most recent hobby is learning from his four-year-old son. You can find Professor Aral on Twitter @sinanaral.

# MEASURING RETURNS TO SOCIAL ADVERTISING

JEREMY SEIDMAN MBA '03
Chair, MIT Sloan CFO Summit

Jeremy Seidman 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.

Mr. Seidman 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, Mr. Seidman founded the MIT Sloan CFO Summit (www.mitcfo.com), the premier forum for corporate finance executives, and continues to serve as chairperson. Mr. Seidman 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, Wall Street Journal*, and *Boston Business Journal*. Mr. Seidman currently serves on the advisory boards for Coaching4Change, and MIT Sloan Boston Alumni Association. Mr. Seidman, his wife, son, and daughter live in Wellesley, and enjoy skiing as often as possible at Loon Mountain in NH.

Social media offers a channel to connect with potential end users and encourage demand for a product or service. Dr. Sinan Aral is an expert on content, context and campaigns; impact, ideas and interests. Join us for his insights into the social dynamics of on-line influence.

### #DURABLECFO:

Fireside Chat with Twitter's Ned Segal

9:00 AM - 9:30 AM GRAND BALLROOM

MORNING FIRESIDE CHAT

Ned Segal, CFO of Twitter, shares Twitter's approach to business durability: being purpose driven, customer focused, principled, and making decisions with a long term view, whether resourcing projects, making tough business decisions, or hiring people. Mr. Segal will break it down further in a conversation with Dr. Sinan Aral, MIT PhD and David Austin Professor of Management, MIT Sloan.





**NED SEGAL**Chief Financial Officer, Twitter

Ned Segal is Twitter's Chief Financial Officer, overseeing accounting, business development, corporate development, corporate security, financial planning and analysis, investor relations, internal audit, real estate and workplace, and tax and treasury for Twitter. Prior to joining Twitter, he was senior vice president of finance for Intuit's Small Business Group. He has also served as chief financial officer of RPX, the leader in patent risk management solutions to technology companies around the world, and spent 17 years at Goldman Sachs, most recently as managing director, head of global software investment banking. He resides in San Francisco with his wife and three children.





SINAN ARAL MIT PHD '07

David Austin Professor of Management, MIT Sloan



Managing Director Wealth Management 617-247-6120 jeremy.seidman@ubs.com 200 Clarendon Street

**UBS Financial Services Inc.** 

24th Floor Boston, MA 02116

### Invest in ideas

#### Empowering today's CFOs

UBS is proud to sponsor the 17th 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 summit's theme, *The Durable CFO: Results and Reinvention*, applies to our dedication to you, our CFO clients.

To receive a CFO wealth report, please contact Jeremy Seidman.

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Jeremy Seidman



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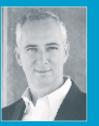
### LEADERSHIP:

### Letters to My Younger Self

9:30 AM - 10:00 AM GRAND BALLROOM

MORNING KEYNOTE

After nearly seven years in the role of chief operating officer of 1-800-GOT-JUNK that grew from \$2 million to \$106 million, Cameron Herold wanted the lessons he'd learned to sink in. So, immediately following leaving the company, he wrote for twenty minutes every day in a journal to capture what he'd learned. He wrote lists. He mind-mapped. He just wrote. He learned about himself during that period of reflecting. During this AM Keynote session, Mr. Herold will share fifty-eight hardcore leadership lessons that he'd actually learned in 20 years of building 4 fast-growth companies.



#### **COO**ALLIANCE

#### CAMERON HEROLD

Founder, COO Alliance

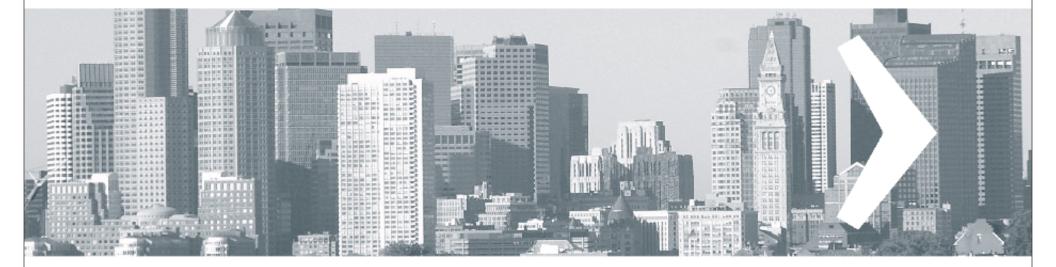
Cameron Herold is known around the world as THE CEO WHISPERER. He is the mastermind behind hundreds of companies' exponential growth. He has built a dynamic consultancy: his clients have included a "Big 4" wireless carrier and a monarchy. His clients say that what they like most about him is that he is not a theory guy. They like that Mr. Herold speaks only from experience. He earned his reputation as the CEO Whisperer by guiding his clients to double their profit and double their revenue in just three years or less.

Mr. Herold was an entrepreneur from day 1. At age 21, he had 14 employees. By 35, he'd help build his first two \$100 million dollar companies. By the age of 42, he engineered 1-800-GOT-JUNK?'s spectacular growth from \$2 million to \$106 million in revenue and 3100 employees—and he did that in just six years.

When he steps off the stage, he doesn't stop teaching. He is the author of the global best-selling business book *Double Double*, in its 7th printing and in multiple translations around the world.

Mr. Herold is a top-rated international speaker and has been paid to speak in 26 countries. He is also the top-rated lecturer at EO/MIT's Entrepreneurial Masters Program and a powerful and effective speaker at Chief Executive Officer and Chief Operating Officer leadership events around the world.





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#### Contact

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Boston Tech Banking Corporate Finance
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#### Get in touch at svb.com

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10:30 AM - 11:30 AM GRAND BALLROOM

TRACK 1: Reinvention

FINANCE 2.0: Building
a Programmatic
M&A and Divestiture
Strategy

There's more money on company balance sheets and private equity coffers are bigger than ever. So, how do the best companies make the M&A process on their finance and operations teams as systematic as possible? How do they measure this effectively to create a repeatable and successful M&A strategy?



McKinsey&Company

#### **DEV PATEL**Partner, McKinsey & Company

Dev Patel is a Partner in McKinsey & Company's Chicago office where is a leader in their M&A practice, and an active member of its telecom and media practice in North America. Prior to joining McKinsey, Mr. Patel spent more than 7 years at Motorola in a variety of roles. He most recently was the Director of Business Development within the Network and Devices business, responsible for architecting the WiMAX and LTE market strategy and product roadmaps.

Mr. Patel holds an MBA from the Kellogg school of management, a MSEE from the Illinois Institute of technology and a BSEE from the University of Illinois at Urbana-Champaign.



#### mks

#### SETH BAGSHAW

Senior Vice President, Chief Financial Officer & Treasurer, MKS Instruments, Inc.

Seth Bagshaw has worldwide responsibility for all finance, treasury and Information Technology functions and joined MKS in 2006. Prior to joining MKS, he served as Vice President and Chief Financial Officer of Vette Corp., an integrated global supplier of thermal management systems. And, he served as Vice President and Chief Financial Officer of Palo Alto Products International, Inc., an industrial design, engineering and manufacturing company, until its acquisition by Flextronics International, Ltd. Prior to that, he held several senior financial management positions at Waters Corporation, a developer of innovative analytical science solutions, most recently as Vice President and Chief Financial Officer of its Asia-Pacific region.

Mr. Bagshaw has extensive mergers and acquisitions experience and was an integral part of the MKS management team that has diversified the Company into industrial technology markets that require advanced lasers, optics and photonics applications. From 2013 to 2018, MKS has grown from \$670 million in revenue to proforma revenue of \$2.5 billion through acquisitions and organic growth.

Mr. Bagshaw has been a member of the Board of Directors of Associated Industries of Massachusetts, a non-profit state-wide employer advocacy and service organization, since 2010 and has served on its Audit Committee from 2014 to 2019. Mr. Bagshaw is a Certified Public Accountant and graduated with a B.S. in Business Administration, summa cum laude, from Boston University, and he has an M.B.A. from Cornell University.



BainCapital

#### BRIAN GLADDEN

Operating Partner, Bain Capital, LP

Brian Gladden joined Bain Capital Private Equity in 2018. He is an Operating Partner in the Portfolio Group and a member of the North American Private Equity team.

Prior to joining Bain Capital Private Equity, Mr. Gladden was the CFO of Mondelēz. He oversaw all aspects of the company's global finance function including M&A, information technology, facilities and global business services. Prior to Mondelēz, Mr. Gladden was CFO of Dell. He began his career at General Electric, serving for nearly two decades in various senior finance and management positions including as President and CEO of GE Plastics and divisional CFO roles in the Plastics and Healthcare business.

Mr. Gladden received a B.S. in Business Administration from Millersville University of Pennsylvania.





#### CHRISTOPHER MONTGOMERY

Managing Director, Head of Software, Americas, UBS

Chris Montgomery joined UBS in 2016 and leads the UBS Americas Software practice. Previously he was a Senior Vice President with Jefferies, and prior to that was responsible for supply and demand management for server and workstation processors for Intel Corporation.

Mr. Montgomery has more than 11 years of experience as an investment banker in the Enterprise Software and broader Technology sectors. He has advised a broad range of clients across application, infrastructure and communications software on strategic advisory and capital markets transactions.

Mr. Montgomery earned his BS in Computer Systems Engineering from Stanford University and his MBA from Harvard Business School.





#### KEN STILLWELL

Senior Vice President, Chief Financial Officer & Chief Administration Officer, Pegasystems Inc.

Ken Stillwell has over 20 years of financial leadership experience in high growth organizations in the technology sector. He joined Pegasystems Inc. from Dynatrace in 2016 where he served as senior vice president and chief financial officer. At Dynatrace, he oversaw the global functions within finance and accounting, as well as expanded nonfinancial functions such as HR, IT, and Legal. He was also the EVP/CFO at SOVOS, a financial and compliance software as a service (SaaS) company in Boston, where he managed several operational functions in addition to his duties as CFO. Mr. Stillwell also brings five years of financial leadership experience from PTC, where he served as the divisional CFO within the product lifecycle management (PLM) and application lifecycle management (ALM) segment.

Since joining Pegasystems Inc. in 2016, Mr. Stillwell has been helping lead the organization through a major business transition as the company has moved from a majority on-premise model to an "as-a-service" model of recurring contracts. This includes assessing market opportunity and dynamics, educating internal and external stakeholders, while improving communication with investors about the impact.

He is a graduate of the University of Pittsburgh, where he earned his undergraduate degree in business/economics, and the University of South Carolina, where he earned his master's in accounting and finance. He is a certified public accountant and based in Pegasystems Inc.'s Cambridge, MA headquarters.

10:30 AM - 11:30 AM SALONS FGH

TRACK 2: Results

# NEGOTIATION 2.0: Driving the Entire Team to Think Differently

Negotiations are an ongoing factor in business success. Whether the counter-party is internal or external, advocating for a position and reaching agreement is critical to driving the business forward. Our panel with review how the CFO can help the team to bring new approaches to managing negotiations and ensuring forward progress.



### Mii

#### BRUNO VERDINI, PHD

Executive Director, MIT Harvard Mexico Negotiation Program

Bruno Verdini is Executive Director of the MIT-Harvard Mexico Negotiation Program, Assistant Director at the MIT Science Impact Collaborative, Lecturer in Urban Planning and Negotiation at MIT's School of Architecture and Planning, Visiting Faculty at the Asia School of Business in partnership with MIT's Sloan School of Management, and Visiting Professor at the Program on Negotiation at Harvard Law School. He is the creator of The Art and Science of Negotiation and Leadership in Negotiation: Advanced Applications, two of MIT's highest ranked and most popular semester-long electives. Professor Verdini leads executive trainings and consulting work for governments, firms, and international organizations around the world, and has been fortunate to be involved with the teams negotiating financial, technical, and scientific cooperation agreements between many countries around the world and United States, as well as the International Energy Agency, International Atomic Nuclear Agency, International Renewable Energy Agency, Organization of Petroleum Exporting Countries, World Economic Forum, and World Bank. He is the author of Winning Together: The Natural Resource Negotiation Playbook (MIT Press), which received Harvard Law School's Award for best research of the year in negotiation, mediation, decision-making, and dispute resolution.





#### **KOURTNEY CORCORAN**

Senior Vice President & Chief Financial Officer, Legal Sea Foods

Kourtney Corcoran is a highly successful executive in the worldwide consumer products industry with over 25 years of leadership responsibility in finance, operations, human resources and information technology. She is currently Senior Vice President & Chief Financial Officer, for Legal Sea Foods, a 37 location restaurant entity with global brand recognition. In her current role, Ms. Corcoran leads Legal's finance, IT, compensation and benefits teams as well as the company's financial and long term strategic planning process. She also manages all banking relationships and has direct reporting responsibility to the CEO.

Prior to joining Legal Sea Foods, Ms. Corcoran spent a year as EVP, CFO at East Coast Seafood Group, a \$350M lobster and scallop operation, implementing best in class business processes which resulted in a successful ABL credit facility refinance as well as a 50% improvement of company EBITDA. She also spent a year at Slade Gorton in a similar role. Most profoundly in this space was her experience at High Liner Foods, a \$1.2B publicly traded enterprise. As Vice President of Finance she provided financial, strategic, and operational leadership for the \$800M US operations business unit. She led integration teams for 5 major acquisitions and created data measurement and management tools that led to significant supply chain savings.

She has also been an advocate for Women in Leadership demonstrated by her development of "Women Leading the Way," the High Liner Foods diversity program focused on the promotion of women in leadership roles in an industry with low female representation.





Chief Financial Officer, WHOOP™

Lucy McQuilken is Chief Financial Officer at WHOOP, Inc, a leading Sports Wearables company in Boston MA. She formerly served as part time CFO at several Boston and NY area start-ups including Zagster, where she was a Member of Board, and at Access Sports Media, ThirdChannel, Jebbit, and Accion-Systems, among others. Ms. McQuilken co-founded Groove Mobile in 2001, and served as its Chief Executive Officer. She joined Intel Capital in 2004 and for nine years specialized in global consumer internet investing.

Prior to her venture career working both sides of the funding table, Ms. McQuilken worked for nine years at Agilent and Hewlett Packard as a Key Account Sales Manager, Product Manager, Engineering Manager and Manufacturing Manager. She also worked as an ASIC Test Engineer at Analog Devices and a Product Engineer at AMD. Ms. McQuilken holds a B.S.E.E. degree in Electrical Engineering from Duke University and an M.B.A. from Clark University.



rh Robert Half\* Management Resources

#### ROBERT NEALON

District President, Professional Staffing Services, Robert Half

Robert Nealon is the District President for Robert Half, the world's first and largest professional staffing firm. In his role, he is responsible for overseeing Professional Staffing Divisions in Massachusetts, Rhode Island, New Hampshire, Maine and Upstate New York. Mr. Nealon has been with Robert Half for more than 12 years, starting as a Staffing Manager and having worked his way to highlevel management positions such as Branch Manager, Metro Market Manager and Regional Vice President before assuming role of District President in January 2019.

He has been an instrumental presence in helping to grow the company's OfficeTeam, Accountemps, Robert Half Finance & Accounting and Robert Half Management Resources divisions. He holds a Bachelor of Science degree in mechanical engineering from the University of Rhode Island and an MBA in finance and supply chain management from Syracuse University.



Carbon Black.

STEVE WEBBER

Chief Financial Officer, Carbon Black

Steve Webber leads Carbon Black's finance and administration organization. He has more than 25 years of financial management and executive leadership, most recently as Chief Operating Officer and Chief Financial Officer of BackOffice Associates. He was also CFO at Cynosure, where he managed Investor Relations, Global Services, IT and the Finance function and was part of the team that led the sale to Hologic. Mr. Webber spent 19 years at EMC Corporation and was promoted to leadership positions of increasing responsibility, including corporate finance, international finance and business partner roles supporting the Enterprise Software Division and Global Enterprise Services.

His last role at EMC was CFO of Virtustream, a stand-alone subsidiary focused on the enterprise cloud market, prior to the Dell acquisition of EMC. He started his career at Deloitte in Boston. Steve earned a bachelor's degree from Babson College and his MBA from the F.W. Olin Graduate School of Business at Babson College.

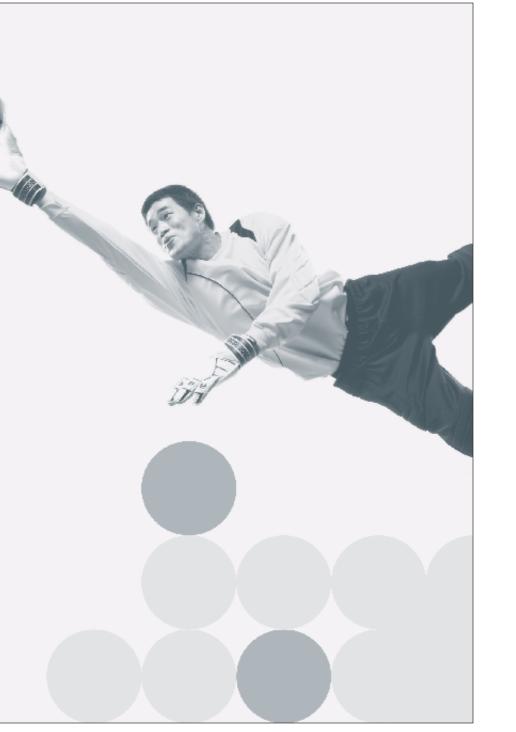


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12:00 PM - 1:15 PM GRAND BALLROOM

LUNCHEON KEYNOTE PANEL

# LEADERSHIP IN THE DIRECT-TO-CONSUMER EVOLUTION

Consumers are more connected and more demanding than ever before. As the direct-to-consumer model continues to explode, companies face more options too, such as how frequently technology is updated, what the optimal number of SKUs is, and how to balance consumers' demands for specificity with companies' need for the scale that is required to succeed. Learn how these best-in-class leaders have transformed on pace with their customers.



#### DALTON PERRAS

Associate Director, Corporate & Affiliate Marketing, MIT Sloan Executive Education

Dalton Perras is Associate Director, Corporate & Partner Marketing at the MIT Sloan School of Management Office of Executive Education. He helps develop, design, and deliver innovative executive education programs for individuals and companies. He brings over twenty years of experience in corporate marketing in the energy and technology sectors, ranging from concession negotiations in the extraction industries in the Persian Gulf, as an expert in the deregulation of the electric power sector in North America, and in startup environments, most recently with the commercialization of a nanotechnology for the refining and water purification sectors.

Mr. Perras holds a BA from Boston College and an MBA from Georgetown University.



WS.

#### NINA TRENTMANN

News Editor, CFO Journal, The Wall Street Journal

Nina Trentmann is a News Editor at *CFO Journal*, the *Wall Street Journal*'s corporate finance group. Ms. Trentmann's career spans over one decade and includes coverage of the banking, auto, manufacturing and technology sector in the U.K., Germany and China. Prior to her role at the *Wall Street Journal*, she worked for the German media group WELTN24 in London, Berlin and Shanghai. Ms. Trentmann studied at Bonn University in Germany, Georgetown University in the U.S., the London School of Economics (LSE) in the U.K. and Fudan University in China and did her journalistic training with Axel Springer Academy/WELTN24 in Berlin.



#### DIAGEO

#### LAVANYA CHANDRASHEKAR

Chief Financial Officer, Diageo North America

Lavanya Chandrashekar Chopra is Chief Financial Officer for Diageo North America where she sets and oversees Diageo's financial strategy across the United States and Canada.

Ms. Chandrashekar is a highly strategic leader, with a passion for developing people and teams. With a career spanning 20 years, she is known for both her results-orientated approach and ability to drive transformational change, across multiple markets and geographies.

She started her career at Procter & Gamble where she worked for more than fifteen years supporting the organization's finance functions across a global portfolio of recognized brands. Prior to Diageo, Ms. Chandrashekar was CFO of Mondelez International's North America business, where she spent more than four years. Originally from India, her career has seen her work in Asia, North America, Europe, the Middle East and Africa.

She joined Diageo in July 2018 and is currently based in Greater New York with her husband and son.



#### RACHEL GLASER

Chief Financial Officer, Etsy

Rachel Glaser is Etsy's CFO, bringing more than 30 years of senior financial experience to Etsy. She's responsible for overseeing our global financial operations.

Ms. Glaser joins Etsy from Leaf Group, where she served as CFO since 2015. While at Leaf Group, she led efforts that strengthened operating efficiency and helped the company through a transformative period and a return to growth. Prior to joining Leaf, she was CFO at Move, Inc. and helped lead a successful sale of the company to News Corporation.

She has also held roles as Senior Vice President, Operations Finance at Yahoo! and at The Walt Disney Company, where she spent nearly 20 years in leadership positions in finance, operations, and technology teams. Rachel Glaser was elected to the Board of Directors of *The New York Times* Company in 2018.





#### **JILL WOODWORTH** SB '94 Chief Financial Officer, Peloton Interactive

Jill Woodworth joins Peloton with 20+ years of experience in the finance world, 12 of those at JP Morgan. Most recently, she led JP Morgan's disruptive commerce group, a joint venture designed to bridge the gap between technology and retail client coverage. As a Managing Director within the investment bank, Ms. Woodworth headed the retail sector and before that, ran equity capital markets origination for retail and consumer products companies. During her time at the leading financial institution, Woodworth worked closely with clients including Shake Shack, Planet Fitness, Dunkin' Brands, and Michael Kors.

Prior to JP Morgan, she began her career in investment banking at Morgan Stanley where she held various positions within equity capital markets and client coverage across competitive regions including New York, Los Angeles, London and Sydney. She is a graduate of MIT, where she earned a bachelor's degree in Economics.

1:30 PM - 2:30 PM GRAND BALLROOM

TRACK 1: Reinvention

## SCENARIO PLANNING: Green, Yellow & Red

Scenario planning is the art of moving forward on plan, while having alternatives in hand if things turn out differently than expected. Whether it's a near-in goal or a longer term objective, it's important to prepare for a range of outcomes. Join us for a panel that will examine best practices for green, yellow and red scenarios—across everything from software implementation to revenue goals.



WILMERHALE WH

GEORGE W. SHUSTER, JR.

Partner, WilmerHale

George Shuster's practice focuses on the areas of bankruptcy, insolvency risk mitigation, out-of-court restructurings and debt finance transactions. With his extensive experience and knowledge of a wide range of transactions, Mr. Shuster is able to successfully represent and counsel a variety of clients, including public and private technology companies, real estate developers, manufacturers, financial organizations and many other businesses.

Mr. Shuster represents creditors, lenders, bondholders, borrowers and debtors in finance, Uniform Commercial Code (UCC), bankruptcy and financial restructuring transactions and related litigation. He has particular experience in mitigating insolvency risk in intellectual property transactions and in cross-border insolvency.





DAN ALLRED

Senior Market Manager, Silicon Valley Bank

Dan Allred is a Senior Market Manager for Silicon Valley Bank (SVB) leading the bank's technology practice in Boston. In this role, he and his team partner with companies innovating in enterprise software, hardware, consumer tech, and fintech; leveraging the strengths of their team and the passion and energy of their clients to help clients achieve growth, scalability and outsized success in a competitive, global environment. Having worked for SVB since 2002, he has had the privilege to work with and learn from founders, entrepreneurs and executives whose companies are impacting the world in remarkable ways.

Before SVB Boston snagged him in 2007 to build their Accelerator team, Mr. Allred headed up SVB's business development efforts in Research Triangle Park, North Carolina. He started his career at the Council for Entrepreneurial Development (CED), also in Research Triangle Park. In this role, he worked with founders and venture capitalists to help build that community's tech and life science ecosystem.

He received his bachelor's degree from the University of North Carolina at Chapel Hill, where he graduated as a member of the Phi Beta Kappa Society. He volunteers on the board of directors for the SVB Foundation, which grants funds to various organizations in the communities that SVB serves.





CHRIS CASWELL

Chief Financial Officer, Welch's

Chris Caswell is a strategic leader with proven track record of partnering with CEOs and Boards of Directors to drive success within complex organizational structures. He has a successful history of over-delivering aggressive targets in both high growth and turn-around environments. He has identified and implemented strategic plans and reorganized finance and broader teams to ensure effective collaboration and implementation. In order to drive execution he has created appropriate metrics and reporting and is adept at effectively communicating a consistent message to Boards of Directors, executive leadership, external parties, as well as the general employee population.

His experience includes significant financial and operational transformation, international expansion and management, M&A execution and post-close integration, large scale system implementations, operational supply chain management and network optimization, strategic omni-channel customer delivery review, balance sheet capitalization, and inventory management.

A passion of his is creating and implementing a strong strategic vision with best in class principles for the organization. Through this lens he has developed high functioning teams with a focus on cross functional talent development.





#### LISA DAVIDSON

Chief Financial Officer, Fractyl Laboratories, Inc.

Lisa Davidson currently serves as Chief Financial Officer for Fractyl, a Medical Technology company developing innovative products and procedures to shift the treatment paradigm for patients with metabolic diseases, a position she has held since 2015. Ms. Davidson has more than 25 years of broad corporate finance experience encompassing treasury management, strategic planning, operations finance, and controllership. She served as Vice President of Finance & Administration of Flexion Therapeutics, Inc. seeing them through an Initial Public Offering on NASDAQ (FLXN) in 2014. Prior to Flexion, she served as Director of Finance at OmniSonics Medical Technologies, Inc. She previously served in various finance, strategy and administration positions at Fisher Scientific International, Inc., Pepsi Bottling Group, and PerkinElmer Inc. Ms. Davidson has helped companies raise more than \$400M in equity and debt financing and has been involved in a number of M&A transactions and product launches. She holds a BA and an MBA, both from the University of New Hampshire.



KALLANDERGROUP, INC.

#### BARRY KALLANDER

President and Founder, KallanderGroup, Inc.

Mr. Kallander is an experienced executive who has held positions as Chief Executive Officer, Chairman, Director, Senior Vice President and Vice President roles in operations, service delivery, sales, and consulting. During his 35-year career, he has lead businesses providing management consulting, strategy, and software and hardware solutions to the nuclear electric power, financial services, major manufacturing, and high-tech industries. He has held executive positions in companies ranging from venturebacked startups to \$5B conglomerates. He is currently President and Founder of KallanderGroup, Inc. founded in May of 2003. KallanderGroup provides advisory, management, and M&A services for distressed, turnaround, or special situations. Prior to founding this company, he was Founder and President of WheelHouse Technologies, Inc., founded in 2006. WheelHouse is a leading cloudbased maintenance management software platform for large yachts, ferry fleets, research ships, security fleets, and workboats.

He began his career in the US Navy Nuclear Submarine Program where he was a nuclear plant electrical operator. He is a graduate of National Louis University and has attended executive programs at Wharton and Brandeis. He holds a 100-ton Masters License from the United States Coast Guard and is an instrument rated private pilot. He is an active pilot in Angel Flight Northeast.

1:30 PM - 2:30 PM SALONS FGH

TRACK 2: Results

# PRIORITIZING OPERATIONAL EXCELLENCE

For companies big and small, operations can too easily get bumped to the bottom of the list until problems emerge. Hear how these CFOs ensure consistency and reliability across internal and external facing operations including everything from employee reimbursement to closing the books to managing accounts receivable to executing on strategy.



#### KEN BETTENHAUSER

President & Managing Director, HR Knowledge

Ken Bettenhauser he is one of the Founders of HR Knowledge. He's been in the HR, payroll, benefits, and technology space for almost 25 years. Since graduating from Bentley, he got married and had three kids with his wife Nikki. His professional experience at ADP, a VC-backed tech startup, and Oracle provided him with the foundation to start his own business. Part of it was out of necessity (he was laid off from Oracle in 2002) and part of it was his desire to build something great. Mr. Bettenhauser is passionate about service, and is constantly honing his skills in the areas in which he advises clients. His preparation is something that stands out as he strives to find a creative solution to meet the needs of every client.

(**HRK**nowledge

He is also passionate about coaching youth sports. For 15+ years, he has coached youth soccer, baseball, softball, and basketball. He enjoys watching his teams grow athletically and cohesively. He is a stickler during practice and believes the practiced subtle details, if executed in games, will enable his players to get the most out of their abilities. It's important for him to create an environment that is fun, as he has not sent any player to Pros, although many parents thought their kids would make it.





#### AVNER APPLBAUM

Chief Financial Officer, Double E Company, LLC

Avner Applbaum is the Chief Financial Officer of Double E Company, LLC, which is a private equity backed global manufacturer of web handling equipment. Mr. Applbaum is responsible for finance, operations, mergers and acquisitions and human resources.

Mr. Applbaum has a unique combination of finance, operations and business partnering skills. He is passionate about creating shareholder value through continuous improvement, operational excellence and transformation of the finance function from back-office providers of accounting services to forward-thinking and strategic advisers to the business.

Previously Mr. Applbaum held several CFO roles for private equity backed companies where he led acquisitions and operational transformation. He established and implemented financial management systems, operational metrics, KPI's and dashboards, driving growth and maximizing EBITDA.

He also brings over 15 years of senior financial and operational roles in publicly traded global manufacturing companies. During that time Mr. Applbaum successfully integrated over 20 companies and consistently delivered performance improvements, profit growth and increased cash flow.

Mr. Applbaum graduated from Bar-Ilan University and is a Certified Public Accountant (Israel).





#### AMANDA DUGUAY

Chief Financial Officer, Profitect (now part of Zebra Technologies Corp.)

Amanda Duguay leads strategic and tactical initiatives, as well as all financial operations for Profitect Inc., a prescriptive analytics SaaS solution company serving retail leaders. She played a critical role in the company's recent acquisition by Zebra Technologies.

As a Finance Business Partner supporting numerous operational BUs at Parexel from 2013 to 2018, Ms. Duguay also led multiple financial and operational integrations for newly acquired entities. With Parexel, she had the honor of participating in the WISDOM program (Women Inspiring Success & Developing Others to Management). She also has experience as an assurance professional as part of PwC's Boston Technology practice.

Ms. Duguay is Co-Chair of the Boston CFO Leadership Council, a 300+ member community. She is passionate about mentoring and coaching, especially in the area of women's empowerment. Ms. Duguay is a CPA and holds a Master's degree in Accountancy from Bentley University, and a Bachelor's degree in Bioscience & Technology from the University of New Hampshire.



#### lola.com

#### REBECCA MORRISON

Vice President of Finance and Operations, Lola.com

Rebecca Morrison is Vice President of Finance and Operations at Lola.com, Agile Travel Management™. Previously, she was Vice President, Global Finance and Operations at Midaxo, a leader in mergers and acquisitions (M&A) software. In her time there, she oversaw all backoffice operations including Finance, Operations, HR, and Admin. Prior to that, Ms. Morrison spent four years at HubSpot holding various roles with the Sales Strategy and Operations team, as well as the Finance organization.

Prior to her time at HubSpot, she spent nine years in various finance and operations roles at EMC and RSA, the Security Division of EMC, including a three year stint in Singapore. Ms. Morrison earned both a bachelor's degree and master's degree in finance from Bentley University.





#### SARAH ROMANO

Chief Financial Officer, EyeGate Pharmaceuticals

Sarah Romano joined EyeGate Pharmaceuticals as Corporate Controller in 2016 and was appointed Chief Financial Officer in January 2018. Since joining the Company, she has been responsible for the Company's accounting, tax, financial reporting, and internal controls. Prior to joining EyeGate, Ms. Romano served as Assistant Controller at TechTarget and Corporate Controller at Bowdoin Group, a healthcare-focused executive recruiting firm. Previously, she held financial reporting positions of increasing responsibility at SoundBite Communications until its acquisition by Genesys in 2013, and was a Senior Financial Reporting Analyst at Cognex Corporation, a publicly-traded manufacturer of machine vision systems, software and sensors. Ms. Romano began her career as an Auditor in the Boston office of PricewaterhouseCoopers. A licensed CPA in Massachusetts, she holds a Bachelor of Arts in Accounting from College of the Holy Cross and Masters of Accounting from Boston College.

McKinsey & Company

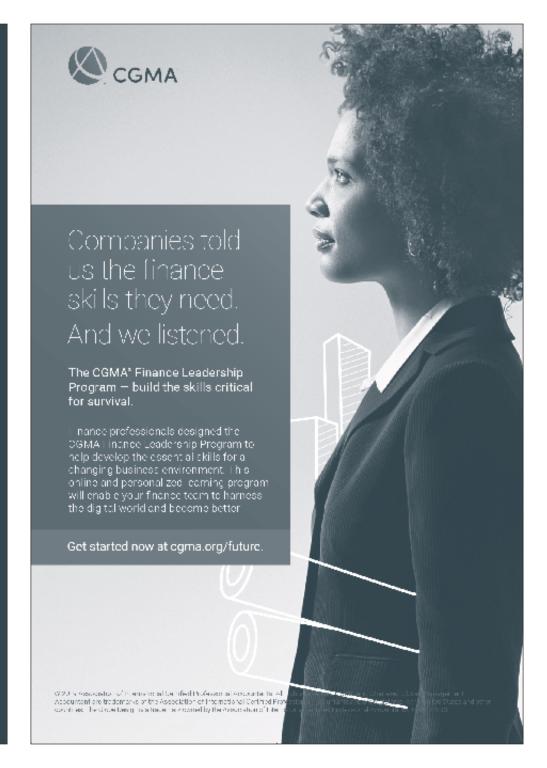
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2:30 PM - 3:30 PM GRAND BALLROOM

TRACK 1: Reinvention

WORKPLACE FOR THE FUTURE: Reinventing Technology, Processes, and People

Today's workplace is far different from that of 10 years ago, and tomorrow's will continue to bring new changes. Regardless of industry—be it academia, government, manufacturing, retail, life sciences, sciences, or technology—part of the CFO's role is helping to navigate a changing landscape. This panel will review how to succeed in evaluating new technologies, implementing new processes, and retaining and retraining a fluid workforce.



#### **ASH NOAH**

Managing Director, CGMA's Learning & Educational Development, American Institute of CPAs (AICPA)

Ash Noah, CPA, CGMA, FCMA, is Managing Director of CGMA Learning, Education & Development at the Association of International Certified Professional Accountants. In this role, he engages with CFOs and Finance Leaders worldwide to understand how finance teams are evolving and guides Association's initiatives to ensure that the Chartered Global Management Accountant (CGMA) learning content, syllabus and examinations are future-ready.

CGMA

He works to make sure the CGMA designation continues to be recognized as the qualification of choice by employers and supports CGMA holders to help them create more value for their organizations in the digital age.

Mr. Noah joined the Association in 2012, and prior to that served as CFO of the International BU of TNT Express, the global transport and logistics provider and led finance teams in 45 countries through significant transformation.

He is a licensed U.S. CPA, a CGMA designation holder and a Fellow of CIMA. He is also an avid aviator, and is based in Durham, North Carolina.





#### JAWAD AHSAN MBA '14

Chief Financial Officer, Axon

Jawad Ahsan joined Axon in 2017 and is responsible for leading the company's global finance, corporate strategy, legal and IT organizations, as well as Axon's consumerfacing business. The Axon vision is bigger than just cameras, weapons or software. They work every day to make the bullet obsolete. Their mission is to protect life and help make communities safer by bringing advanced technologies to law enforcement.

Prior to Axon, he was CFO for Market Track, a PE-backed marketing intelligence SaaS company that he helped guide to an exit to Vista Equity. He spent 13 years in various roles at GE, most notably serving as CFO for GE Healthcare's electronic health record and enterprise software solutions. Mr. Ahsan gained substantial international experience with GE's internal Corporate Audit Staff, and is a graduate of GE's Financial Management Program. He earned his MBA from the MIT Sloan School of Management and a BA in Economics from the College of the Holy Cross.



#### Seeq

#### TAMMY MARTIN

Chief Financial Officer, Seeq Corporation

Tammy Martin leads the Seeq's worldwide financial, accounting and human resource operations, including financial systems, investor relations, people ops, culture and engagement, and global expansion. She participates in the organization's fundraising and due diligence activities, as well as monitors and upgrades the fiscal organization in preparation for an IPO. Ms. Martin deployed an automated finance as a service (FaaS) financial reporting technology solution to efficiently scale the finance office and easily integrate with other systems while saving time and money.

Ms. Martin leads the annual 409(a) valuation, FAS 123R stock compensation expense and financial reporting requirements using their Cap Table management software. She acts as a liaison with the firm's auditors, bankers and PEO firm, and prepares board level financial metrics and quarterly investor reports. She is a recognized thought leader on directing a disbursed workforce.

Seeq is a venture-backed software company with headquarters in Seattle, Washington. The company is organized as a virtual company to attract the best talent across the country and around the globe.



#### KPMG

#### EVAN METTER

Principal, KPMG US

As a Principal in KPMG's Advisory Services practice, Mr. Metter focuses on business transformation, operational excellence, cloud technologies, HR strategy and service delivery. He supports his clients through broader business transformations by focusing on enhancing the effectiveness of the HR function. He is responsible for the HR strategy and vision, HR service delivery design and execution and HR technology selection and implementation. Also, Mr. Metter is a strategic advisor across several implementations to provide oversight and help ensure project success.





SHAN NAIR, PHD

President, Nucleus

Dr. Shan Nair is an entrepreneur and consultant on international expansion. He co-founded an earlier company bearing his name and grew it from a 2-person start-up to an international business enterprise with about 700 employees in offices in 6 countries before selling the entire business to Private Equity 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 has worked with many companies in their early stages who have since become household names such as Tesla Motors, FaceTime and Sonus Networks.

He took over in August 2018 as President of Nucleus, the leading provider of international expansion services (IES) for small to medium sized companies with operations in multiple countries. Nucleus is unique in that it provides true one stop, multidisciplinary, multi-country shopping for companies seeking international expansion or with international operations.

In addition to the above, he has Angel Invested in a variety of technology companies and PE funds in US and he also runs a UK property portfolio. He has a doctorate in nuclear physics from the University of Oxford. He has received multiple recognitions for his contribution to business in the US, UK and India.

2:30 PM - 3:30 PM SALONS FGH

TRACK 2: Results

# MONEYBALL FOR THE CFO

CFOs are now able to make better decisions because of the availability of data. Of course, they still need to translate their insights into business goals and strategy, and build support among the leadership team as well as business units.

This panel will explore the new insights, and how CFOs are working to optimize their analytic forecasts across the organization.



#### VIVEK F. FARIAS

Patrick J. McGovern Professor of Operations Management, MIT Sloan

Vivek Farias is the Patrick J. McGovern (1959) Professor and a Professor of Operations Management at the MIT Sloan School of Management.

His research focuses on the development of new methodologies for large-scale dynamic optimization under uncertainty, and the application of these methodologies to the design of practical revenue management strategies across various industries ranging from airlines and retail to online advertising. Professor Farias is a recipient of the 2006 INFORMS MSOM Student Paper prize for a research paper judged to be the best in the field of operations management. A consultant in the finance industry, he most recently contributed to GMO LLC's first successful high-frequency algorithmic trading strategy.

He holds a BS in computer engineering from the University of Arizona, and a PhD in electrical engineering from Stanford University.





MARY JEFTS

Chief Financial Officer, Salsify

As Chief Financial Officer of Salsify, Mary Jefts leads Salsify's finance, business operations and administrative functions. She has over 25 years of financial and executive leadership experience at both public and private companies in the technology space.

Prior to Salsify, Ms. Jefts was CFO at Unidesk, Acquia and OpenPages. Throughout her career she has built and led global teams in the areas of finance, people operations/talent acquisition, information technology, information security and legal. Ms. Jefts has extensive experience leading negotiations, due diligence and integration activities for sales of venture-backed companies to public company acquirers. She held a Business Unit Executive role within IBM's Business Analytics division after the sale of OpenPages to IBM.

Ms. Jefts earned her bachelor's degree from Bentley University.





#### KERMAN LAU

Vice President of Finance, Adaptive Insights

Kerman Lau has a broad finance management background, spanning corporate FP&A, sales and BU finance, financial systems, and business intelligence. In his current role as Vice President of Finance at Adaptive Insights, he oversees FP&A and regularly speaks and writes about FP&A best practices.

Prior to joining Adaptive Insights in 2016, he held the role of Vice President of Field Finance at Veritas, supporting a 4,000-person field organization. Prior to that he was Senior Finance Director, Business Intelligence and Reporting, at Symantec, where he was responsible for the company's BI strategy and governance. Prior to that, he was Director of FP&A for Electronic Arts' largest business unit with \$1.5B in sales. Previously, he has held a variety of finance management and analyst roles at VG Holding Corp., Sun Microsystems, and IDT.

He holds a bachelor's degree in finance from San Jose State University and an MBA from Santa Clara University.





#### MIKE MOZZER

Chief Financial Officer, TraceLink

Mike Mozzer is TraceLink's Chief Financial Officer, responsible for the company's global corporate financial strategy. A veteran financial executive of more than 25 years, he started his career in the Boston office of Coopers and Lybrand and has extensive experience with emerging high technology and high growth companies. He joined TraceLink in 2009 as a founding team member, and under is guidance the company is seeing accelerating momentum and a remarkable increase in revenue, customer growth, and employee growth year-over-year.

TraceLink is the World's Largest Track and Trace Network for connecting the Life Sciences supply chain and eliminating counterfeit prescription drugs from the global marketplace. Leading businesses trust the TraceLink Life Sciences Cloud to deliver complete global connectivity, visibility and traceability of pharmaceuticals from ingredient to patient. A winner of numerous industry awards including three consecutive years on Deloitte's Technology Fast 500 (ranked number 177 in 2017), the Amazon AWS Global Start-Up Challenge Grand Prize, and the Edison Award for Innovation in Health Management, the Life Sciences Cloud is used by businesses across the globe to meet strategic goals in ensuring global compliance, fighting drug counterfeiting, improving on-time and in-full delivery, protecting product quality and reducing operational cost.

Mr. Mozzer holds a Master of Business Administration with a concentration in Finance from Babson College, and a Bachelor of Science degree in Accounting and Management from Northeastern University.





#### TIM ZUE AB '99

Executive Vice President & Chief Financial Officer, Boston Red Sox

Tim Zue is responsible for the financial management of the Boston Red Sox overseeing the organization's operating budget, accounting, financial planning, forecasting, and business analytics. Prior to his current role, he served as Senior Vice President of Finance, Strategy and Analytics for both the Red Sox and Fenway Sports Management (FSM).

During his 17-year career with the club, he has played a key role in all financial aspects of the business, including the evaluation and execution of all non-baseball events, ticket pricing decisions, the financial impact of Fenway Park improvements, and the creation of the Red Sox Rewards loyalty program. He also helped conduct the financial due diligence related to Fenway Sports Group's acquisitions of Roush Fenway Racing, Liverpool Football Club, and the marketing rights for LeBron James. In early 2017 he was promoted to Executive Vice President/Chief Financial Officer and he was also selected as one of *Sports Business Journal*'s "40 Under 40" Award recipients.

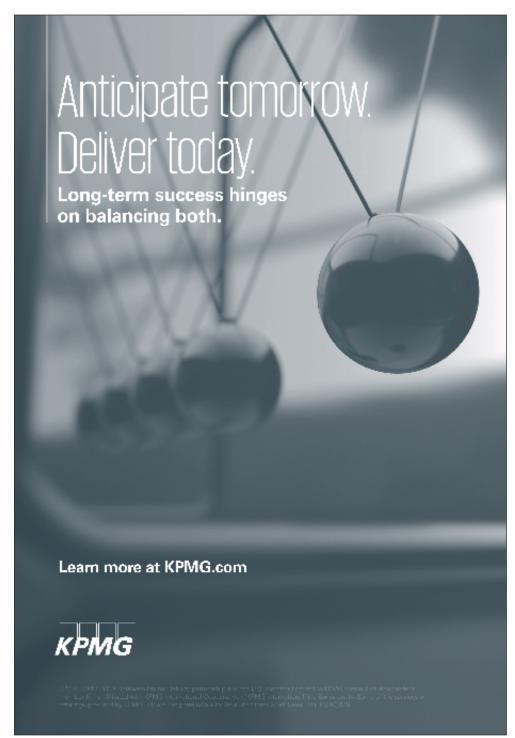
Prior to joining the Red Sox and FSM, Mr. Zue worked for Bain & Company in Boston as an associate consultant. He also taught middle school math and technology in the Boston Public School system for four years. He received a Bachelor's Degree in Mechanical Engineering from MIT in 1999, where he won the prestigious 2.70 robotics design contest and competed in an international robotics design competition in Tokyo.

There's no shortage of courses out there that promise to help you build a finance career.

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# DRIVING THE ROAD OF THE FUTURE

4:00 PM - 4:45 PM GRAND BALLROOM

AFTERNOON KEYNOTE

Enjoy the view from the passenger seat with these Chief Financial Officers as they share their perspectives on the future of transportation including autonomous driving, micro-mobility electric scooters, and bike sharing. Join us for a conversation including how technology, data and innovation are coming together as we journey the road of the future.



MANAGEMEI SLOAN SCHO

#### CHRISTOPHER KNITTEL

George P. Shultz Professor of Applied Economics, MIT Sloan

Christopher Knittel is the George P. Shultz Professor of Applied Economics at MIT Sloan School of Management. He is also the Director of MIT's Center for Energy and Environmental Policy Research which has served as the hub for social science research on energy and the environmental since the late 1970s. Professor Knittel is also the Co-Director of the MIT Energy Initiative's Electric Power System Low Carbon Energy Center and a co-director of The E2e Project, a research initiative between MIT, UG Berkeley, and the University of Chicago to undertake rigorous evaluation of energy efficiency investments. He joined the faculty at MIT in 2011, having taught previously at UC Davis and Boston University.

At MIT he teaches Energy Economics and Policy to undergraduates, MBA students, and graduate students from outside of MIT Sloan. He received his B.A. in economics and political science from the California State University, Stanislaus in 1994 (summa cum laude), an M.A. in economics from UC Davis in 1996, and a Ph.D. in economics from UC Berkeley in 1999. His research focuses on understanding how consumers and firms respond to changes in the energy environment, be it from prices or regulation, and what this means for the costs and benefits of policy. He is the former co-editor of the *Journal of* Public Economics, and an associate editor of the Journal of Transportation Economics and Policy, and Journal of Energy Markets, having previously served as an associate editor of The American Economic Journal — Economic Policy and The Journal of Industrial Economics.



#### cruise

#### GEOFFREY RICHARDSON

Chief Financial Officer, Cruise Automation

Geoff Richardson is the Chief Financial Officer at Cruise. He is responsible for leading financial operations, strategic transactions, operations, new business initiatives, and cost optimization strategy. He brings over 20 years of international finance and operations experience, including strategy development and execution, fundraising, mergers and acquisitions, risk management, accounting, tax, and investor relations.

Geoff Richardson was previously Chief Financial Officer at Kinestral Technologies, a next-generation, dynamic glass company. While there, he scaled the company from the R&D phase to product manufacturing.

Earlier in his career, he spent more than a decade in a variety of capital markets and investment banking roles with Goldman Sachs and Morgan Stanley. Mr. Richardson was also an attorney with Shearman & Sterling prior to switching to banking.



#### TED TOBIASON

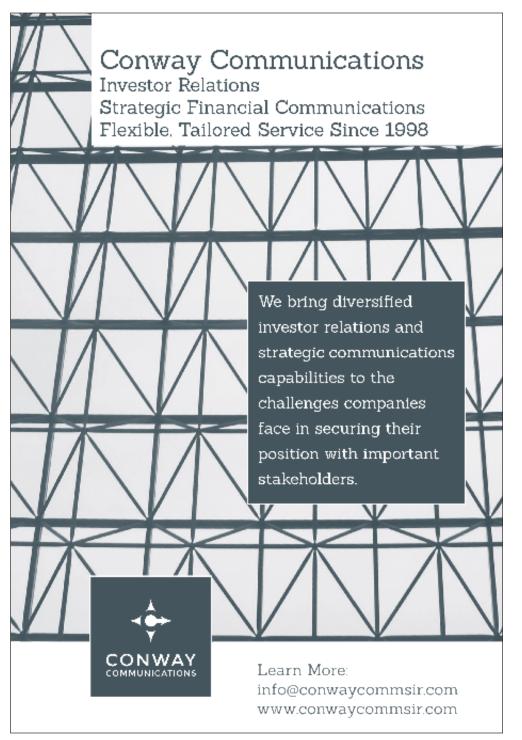
Chief Financial Officer, Lime

Ted Tobiason is Lime's first-ever Chief Financial Officer.
Prior to Lime, he was Managing Director in Technology
Equity Capital Markets at Morgan Stanley. While at Morgan
Stanley, he led the Private Placements Team since 2015.

From his over two decades of financing technology companies, Mr. Tobiason brings with him a wealth of public equity transaction experience gained from extensive work with notable companies including Airbnb, Solarwinds, Uber, Cruise Automation, Sofi, Trulia, Chargepoint, and Twitter.

Before that, he spent eight years as Head of Technology ECM at Deutsche Bank and served as a senior research analyst concentrating on the technology sector for Cypress Funds.

Mr. Tobiason holds an MBA from Columbia Business School and an AB from Princeton University.







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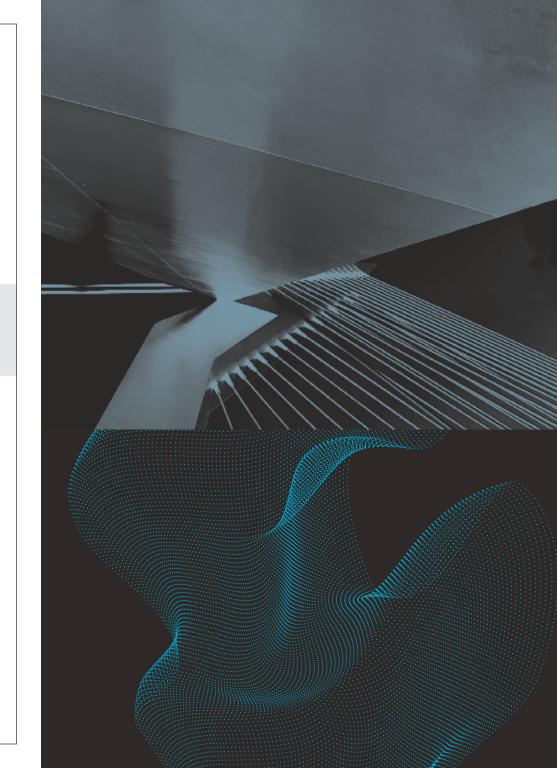
Entrepreneur

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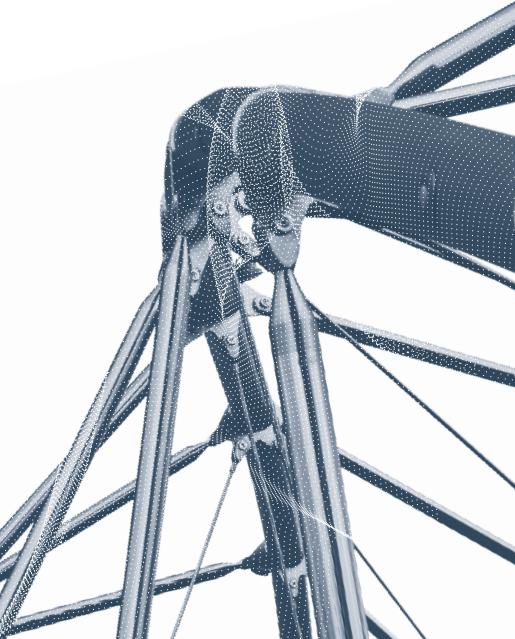


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# CIO SYMPOSIUM

MAY 19, 2020

The MIT Sloan CIO Symposium brings together the academic thought leadership of MIT with the in-the-trenches global experiences of leading CIOs and industry experts in a one day exchange of best practices and actionable insights.

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# 18th Annual MIT SLOAN CFO SUMMIT

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