

# THE FUTURE FORWARD CFO

The 12th Annual MIT Sloan CFO Summit

November 20, 2014



MIT Sloan  
CFO Summit

Boston Alumni Association

[www.mitcfo.com](http://www.mitcfo.com)

# DEAR FRIENDS

Welcome Back to the MIT Sloan CFO Summit! And for those of you attending for the first time...what took you so long?

The MIT Sloan Boston Alumni Association is honored that so many elite chief financial officers have made this a "must see" event every year. The CFO Summit lays an important role in the careers of many of our financial leaders, and has been recognized as the world's most influential conference for chief financial officers.

The theme for today is the Future Forward CFO, truly an apt metaphor for modern CFOs and the organization they lead. Historically, the role of the CFO focused on the past, with minimal forward-looking responsibilities. Reporting accurate financial statements and other "rear view mirror" tasks were the paramount roles of a finance and accounting team. While expertise in financial reporting is and (presumably) always will be a critical skill of a CFO, the role has expanded beyond this. Today proactive readiness has replaced reactive response; strategic planning has replaced historical analysis. The visibility of financial executives has changed, as CFOs have largely assumed the responsibilities formerly done by chief operating officers, focused on making it happen rather than reporting what happened.

Today's breakout panels will all deliver a future forward element. The challenge we faced was that there are an abundance of great topics that the CFO as a forward-oriented leader faces in the role. We chose six that we think have the most impact. Interestingly, none focus on conventional financial reporting, cost management or compliance. With the rise of social media, the 24/7 news cycle and pressure for greater transparency, communications is more important than ever, so one panel is focused on the intersection of finance and communications. Strategic CFOs recognize that M&A is the new R&D, and you can see a great session on this evolving science. We also have a session on the evolving art of business measurements. With GAAP's increasingly technical rules and arcane financial reports being utilized by a broader, more business savvy audience, financial leaders are transcending "accountant speak" with additional metrics and key performance indicators. Locally, at least, one of the great challenges business leaders face relates to recruiting, motivating, training, and retaining elite performers, so we have a panel focused on this skill. Growth opportunities are

abundant, but bring a different set of challenges than a more stable, less risky environment. We discuss managing these infection points. Finally, one of the great challenges of today's CFO is the protection of confidential data, at risk like never before in history. The panel on digital data is a can't miss if this is of concern to you.

We have some incredible keynote speakers today. Jack Klink, executive vice president (I think you left out his expanded title), State Street Bank, will show us how to harness big data and advanced analytics. And we have our traditional morning keynote panel featuring four of the best CFOs - on this or any planet - all from Fortune 500 companies, who will share their expertise into the Future Forward CFO, teaching us how to lead our organizations in an increasingly challenging business environment. And, speaking of future forward, we are also excited by our closing keynote speaker, Nicholas Negroponte, a true MIT icon and founder of the world renowned MIT Media Lab. Nick's will be a presentation unlike anything you have previously seen, and is sure to be one that will have the room buzzing. And if not, he is immediately followed by the cocktail hour, so...

We are often asked if executing the Summit ever gets old. Indeed, there is a lot of work in leading a conference attended by more than 600 professionals, and with approximately 40 speakers. The answer is a resounding no. After 12 years, it remains thrilling to work with some of the world's most talented financial minds. But our favorite part of the Summit is the friendships we have formed with the volunteer team, some of whom have been with us more than a decade. Building the CFO Summit is an eight-month effort that manages to be intellectually challenging, often stressful, yet always fun, and a great source of pride. Our volunteers are the best...their contributions mean more to us than they know. The entire team is listed to the right; when you see them please thank them for their efforts.

We are fortunate to have a great group of sponsors as well. 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

# THE FUTURE FORWARD CFO

15 16 18 19 20 21 22

and intellectual contributions, we could not bring you this conference every year. So, please join us in thanking our platinum sponsor, State Street Bank. Our gold level sponsors include the Association for Finance Professionals, Netsuite, Nixon Peabody and the Silicon Valley Bank. Silver sponsors include HR Knowledge and Robert Half. And, let's not forget the good people who pay for the food today – T3 Advisors and MIT Sloan Executive Education.

There are two firms that merit a special note of thanks, because they make the largest contribution of all to this conference: they support our efforts in its creation. Credit Suisse and KPMG share an unprecedented support for the CFO Community, MIT Sloan and this conference in particular. We feel very fortunate to work with such world-class organizations.

Today is going to rock! Where also can you learn from such great speakers and network with so many friends, old and new? Thank you for coming and spending a day with us.

To infinity and beyond!



**JEREMY SEIDMAN**  
Co-chair, MIT Sloan CFO Summit



**JACK MCCULLOUGH**  
Co-chair, MIT Sloan CFO Summit

## SPONSORS

The MIT Sloan Boston Alumni Association thanks the sponsors who have helped make this event possible:

### DIAMOND



STATE STREET®

### GOLD



### SILVER



### NETWORKING



### MEDIA



## ORGANIZING COMMITTEE

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

**CHRIS BECK**  
CFO, Caldwell Partners

**CHRIS CAPRIO**  
CFO, Altran North America

**RIMI CHAKRABORTY**  
SVP, T3 Advisors

**STEVE DREW**  
Director, KBW Financial

**JOE FALCAO**  
CFO, McCue Corporation

**MARY HENRY**  
CFO, BirdDog Holdings LLC

**LISA JONES**  
Controller, Nexage, Inc.

**BETH KURTH**  
Executive Director, 2020 Women on Boards

**VINAY MEHRA**  
CFO, WGBH

**PAUL RYAN**  
CFO, Planned Parenthood League of Massachusetts

**HOURY YOUSSEFIAN**  
VP Finance & Accounting, Immunetics, Inc.

### MBA CANDIDATES, MIT SLOAN SCHOOL OF MANAGEMENT

**JOHN DOE**  
MBA '14

**JOHN DOE**  
MBA '14

| 7:30 AM – 8:15 AM  | 8:15 AM – 8:45 AM  | 9:15 AM – 10:00 AM  | 10:00 AM – 10:30 AM   | 10:30 AM – 11:30 AM  |
|--|--|---|---|--|
| <p><b>REGISTRATION &amp; CONTINENTAL BREAKFAST</b></p> <p>Grand Ballroom Foyer</p> | <p><b>OPENING REMARKS</b></p> <p>Grand Ballroom</p> <p><b>JEREMY SEIDMAN &amp; JACK McCULLOUGH</b><br/>Co-Chairs, MIT CFO Summit</p>   | <p><b>MORNING KEYNOTE</b></p> <p><b>THE STRATEGIC CFO: HARNESSING THE DISRUPTIVE POWER OF BIG DATA AND ADVANCED ANALYTICS</b></p> <p>Grand Ballroom</p> <p><b>JACK KLINCK</b><br/>Executive Vice President, Head of Global Strategy and New Ventures, State Street Bank &amp; Trust</p> | <p><b>COFFEE BREAK</b></p> <p><b>SPONSOR</b><br/>HR Knowledge</p> <p>Grand Ballroom</p> | <p><b>TRACK 1:</b></p> <p><b>HOW COMPANIES EVOLVE WITH M&amp;A</b></p> <p>Grand Ballroom</p> <p><b>M ANDY WEST</b><br/>Director, McKinsey &amp; Company</p> <p><b>JULIE BRADLEY</b><br/>CFO, TripAdvisor</p> <p><b>JAMES DISNEY</b><br/>Managing Director, Credit Suisse</p> <p><b>CRAIG SAFIAN</b><br/>SVP &amp; CFO, Gartner</p> <p><b>DAVID ZINSNER</b><br/>CFO &amp; VP of Finance, Analog Devices</p> <hr/> <p><b>TRACK 2:</b></p> <p><b>WHEN FINANCE MEETS COMMUNICATIONS</b></p> <p>Salons FGH</p> <p><b>M MICHELLE HANLON</b><br/>Professor of Accounting, MIT Sloan School of Management</p> <p><b>ALISON DEAN</b><br/>EVP &amp; CFO, iRobot</p> <p><b>MARY JEFTS</b><br/>CFO, Unidesk</p> <p><b>DAN MATLOFF</b><br/>CEO, TEM Capital</p> <p><b>MELINDA SMITH</b><br/>CFO, Paydiant</p> |
|  | <p><b>8:45 AM – 9:15 AM</b></p> <p><b>WELCOME TO THE MIT SLOAN CFO SUMMIT</b></p> <p>Grand Ballroom</p> <p><b>HAL B GREGERSEN, PHD</b><br/>Executive Director, MIT Leadership Center, MIT Sloan School of Management</p> |   |   |  |

11:30 AM – 12:15 PM

**LUNCH**

Grand Ballroom

12:15 PM – 1:15 PM

**LUNCHEON KEYNOTE**

**FUTURE FORWARD  
FINANCIAL LEADER**

Grand Ballroom

**CAROL MASSAR** M

Anchor, Bloomberg

**DAVID HERZOG**

CFO, AIG

**DENNIS HICKEY**

CFO, Colgate-Palmolive

**KARYN OVELMEN**

CFO, LyondellBassell

**BRIAN TIERNEY**

EVP & CFO,  
American Electric Power

1:30 PM – 2:30 PM

**TRACK 1:**

**PEOPLE DRIVING PROFIT**

Grand Ballroom

M **DANIEL L. DENISCO**

SVP, Robert Half Management Resources

**MURRAY FISH**

CFO, New England Tea & Coffee

**JAMES HARLAND**

COO & CFO, SilverRail Technologies

**STEVE LIFSHATZ**

CFO, Fleetmatics

**DENA UPTON**

Director, People & Talent, LogMeIn

**TRACK 2:**

**KPIs AND NUMB3RS:  
THE EVOLVING ART OF  
MEASUREMENTS AND  
METRICS**

Salons FGH

M **BRIAN KALISH**

Director, Finance Practice Lead,  
Association for Financial Professionals

**JACQUELYN BARRY HAMILTON**

CFO, Intronis

**MICHAEL KSZYSTYNIAK**

CFO, National Amusements

**DORVIN LIVELY**

CFO, Planet Fitness

**DAVE STACK**

CFO, Localytics

2:30 PM – 3:30 PM

**TRACK 1:**

**GROWING SMART:  
MANAGING  
INFLECTION POINTS**

Grand Ballroom

M **DAN ALLRED**

Market Manager, Silicon Valley Bank

**GARY DICAMMILO**

CEO, Eaglepoint Advisors

**JIM ELIASON**

CFO & Treasurer, Datawatch

**JOHN GAVIN**

CFO, Acacia Communications

**JO TANGO**

Partner, Kepha Partners

**TRACK 2:**

**DANGERS AND DEMANDS  
OF DIGITAL DATA**

Salons FGH

M **GERARD T. LEONE**

Partner, Nixon Peabody

**CYNTHIA IZZO**

Managing Director, KPMG

**LANG LEONARD**

CFO, LevelUp

**CARMEN ORTIZ**

US Attorney, District of Massachusetts

**JOHN PRANCKEVICIUS**

Administration and Finance Director  
& Secretary-Treasurer, Massachusetts  
Port Authority

3:30 PM – 4:00 PM

**COFFEE BREAK**

**SPONSOR**

HR Knowledge

Grand Ballroom

4:00 PM – 5:00 PM

**AFTERNOON KEYNOTE**

**ON MISSION VERSUS  
MARKETS**

Grand Ballroom

**NICHOLAS NEGROPONTE**

Co-Founder, MIT Media Lab

5:00 PM – 6:15 PM

**COCKTAIL RECEPTION**

**SPONSOR**

T3 Advisors

Grand Ballroom

7:30 AM – 8:15 AM

**REGISTRATION &  
CONTINENTAL BREAKFAST**

Grand Ballroom Foyer

8:15 AM – 8:45 AM

**OPENING REMARKS**

Grand Ballroom

**JEREMY SEIDMAN &  
JACK McCULLOUGH**

Co-Chairs, MIT CFO Summit

8:45 AM – 9:15 AM

**WELCOME TO THE MIT  
SLOAN CFO SUMMIT**

Grand Ballroom

**HAL B GREGERSEN, PHD**Executive Director, MIT Leadership  
Center, MIT Sloan School of Management

9:15 AM – 10:00 AM

**MORNING KEYNOTE****THE STRATEGIC CFO:**HARNESSING THE DISRUPTIVE  
POWER OF BIG DATA AND  
ADVANCED ANALYTICS

Grand Ballroom

**JACK KLINCK**Executive Vice President, Head of  
Global Strategy and New Ventures,  
State Street Bank & Trust

10:00 AM – 10:30 AM

**COFFEE BREAK**

Grand Ballroom

**SPONSOR**

HR Knowledge

10:30 AM – 11:30 AM

**TRACK 1:****HOW COMPANIES  
EVOLVE WITH M&A**

Grand Ballroom

**M****ANDY WEST**

Director, McKinsey &amp; Company

**JULIE BRADLEY**

CFO, TripAdvisor

**JAMES DISNEY**

Managing Director, Credit Suisse

**CRAIG SAFIAN**

SVP &amp; CFO, Gartner

**DAVID ZINSNER**

CFO &amp; VP of Finance, Analog Devices

**TRACK 2:****WHEN FINANCE MEETS  
COMMUNICATIONS**

Salons FGH

**M****MICHELLE HANLON**Professor of Accounting,  
MIT Sloan School of Management**ALISON DEAN**

EVP &amp; CFO, iRobot

**MARY JEFTS**

CFO, Unidesk

**DAN MATLOFF**

CEO, TEM Capital

**MELINDA SMITH**

CFO, Paydiant

11:30 AM – 12:15 PM

**LUNCH**

Grand Ballroom

12:15 PM – 1:15 PM

**LUNCHEON KEYNOTE**

**FUTURE FORWARD  
FINANCIAL LEADER**

Grand Ballroom

**M CAROL MASSAR**  
Anchor, Bloomberg

**DAVID HERZOG**  
CFO, AIG

**DENNIS HICKEY**  
CFO, Colgate-Palmolive

**KARYN OVELMEN**  
CFO, LyondellBassell

**BRIAN TIERNEY**  
EVP & CFO,  
American Electric Power

1:30 PM – 2:30 PM

**TRACK 1:**

**PEOPLE DRIVING PROFIT**

Grand Ballroom

**M DANIEL L. DENISCO**  
SVP, Robert Half Management Resources

**MURRAY FISH**  
CFO, New England Tea & Coffee

**JAMES HARLAND**  
COO & CFO, SilverRail Technologies

**STEVE LIFSHATZ**  
CFO, Fleetmatics

**DENA UPTON**  
Director, People & Talent, LogMeln

**TRACK 2:**

**KPIs AND NUMB3RS:  
THE EVOLVING ART OF  
MEASUREMENTS AND  
METRICS**

Salons FGH

**M BRIAN KALISH**  
Director, Finance Practice Lead,  
Association for Financial Professionals

**JACQUELYN BARRY HAMILTON**  
CFO, Intronis

**MICHAEL KSZYSTYNIAK**  
CFO, National Amusements

**DORVIN LIVELY**  
CFO, Planet Fitness

**DAVE STACK**  
CFO, Localytics

2:30 PM – 3:30 PM

**TRACK 1:**

**GROWING SMART:  
MANAGING  
INFLECTION POINTS**

Grand Ballroom

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

**GARY DICAMMILO**  
CEO, Eaglepoint Advisors

**JIM ELIASON**  
CFO & Treasurer, Datawatch

**JOHN GAVIN**  
CFO, Acacia Communications

**JO TANGO**  
Partner, Kephra Partners

**TRACK 2:**

**DANGERS AND DEMANDS  
OF DIGITAL DATA**

Salons FGH

**M GERARD T. LEONE**  
Partner, Nixon Peabody

**CYNTHIA IZZO**  
Managing Director, KPMG

**LANG LEONARD**  
CFO, LevelUp

**CARMEN ORTIZ**  
US Attorney, District of Massachusetts

**JOHN PRANCKEVICIUS**  
Administration and Finance Director  
& Secretary-Treasurer, Massachusetts  
Port Authority

3:30 PM – 4:00 PM

**COFFEE BREAK**

Grand Ballroom

**SPONSOR**  
HR Knowledge

4:00 PM – 5:00 PM

**AFTERNOON KEYNOTE**

**ON MISSION VERSUS  
MARKETS**

Grand Ballroom

**NICHOLAS NEGROPONTE**  
Co-Founder, MIT Media Lab

5:00 PM – 6:15 PM

**COCKTAIL RECEPTION**

Grand Ballroom

**SPONSOR**  
T3 Advisors

# WELCOME TO THE MIT SLOAN CFO SUMMIT

## OPENING REMARKS

8:15 AM - 8:45 AM GRAND BALLROOM

### JEREMY SEIDMAN

MBA '03, Co-chair, MIT Sloan CFO Summit

Jeremy Seidman is a private banker for Credit Suisse, the second largest wealth manager in the world. Jeremy utilizes the firm's global expertise to advise high net worth families, executives, and foundations. Jeremy serves on Credit Suisse's Advisory Counsel for Excellence, a 14-person leadership team in Private Banking Americas. He joined the firm in December 2005 after serving in a similar capacity with Lehman Brothers.

Jeremy graduated cum laude from the University of Pennsylvania with degrees in Economics and Engineering, and received his MBA in Financial Management from the MIT Sloan School of Management. As a founding member of the CFO Summit, Jeremy has always been active in the community, and serves on a number of boards including those at MIT Sloan and the Boston Scholars Program.

Jeremy, his wife Lorin, son Asher, and daughter Romy live in Wellesley where they are active participants in the Seidman family sports Sunday triathlon including air hockey, fantasy football, and video basketball games.

### JACK MCCULLOUGH

MBA '97, Co-chair, MIT Sloan CFO Summit

A client relations director in KPMG's Global Innovation Center, where he works with early-stage investors, entrepreneurs, CFOs and other members of the venture community. Prior to working at KPMG, he worked as CFO for 26 startups, raising over \$200 million in capital. As a former chief financial officer and entrepreneur, he can empathize with the challenges his clients face in growing their businesses.

He is a recognized expert on matters facing chief financial officers, Jack has been quoted by the Wall Street Journal, CFO Magazine, Treasury and Risk Management, the Boston Business Journal, and Business Finance Magazine, and has also been interviewed by Bloomberg, CNN, and Fox Business Network.

Jack is the founder of the CFO RoundTable, the largest CFOonly organization in New England. He was a daredevil in a prior life, enjoying such activities as bungee-cord jumping, parasailing, and skydiving. At present, he spends free time performing extreme fitness programs, and with his wife and two sons.



### HAL B GREGERSEN, PHD

Executive Director, MIT Leadership Center, MIT Sloan School of Management

Hal Gregersen is Executive Director of the MIT Leadership Center and a Senior Lecturer in Leadership and Innovation at the MIT Sloan School of Management where he pursues his vocation of executive teaching, coaching, and research by exploring how leaders in business, government, and society discover provocative new ideas, develop the human and organizational capacity to realize those ideas, and ultimately deliver positive, powerful results.

He is a Senior Fellow at Innosight and a former advisory board member at Pharmascience, a privately held pharmaceutical company based in Montreal, Canada. Before joining MIT, he taught at INSEAD, London Business School, Tuck School of Business at Dartmouth College, Brigham Young University, and in Finland as a Fulbright Fellow.

## WELCOME

8:45 AM - 9:15 AM GRAND BALLROOM

# THE STRATEGIC CFO: HARNESSING THE DISRUPTIVE POWER OF BIG DATA AND ADVANCED ANALYTICS

## MORNING KEYNOTE

9:15 AM - 10:00 AM GRAND BALLROOM



STATE STREET

### JACK KLINCK

Executive Vice President,  
State Street Corporation

Jack Klinck is executive vice president and head of Global Strategy and New Ventures. In this capacity, he is responsible for State Street's data and analytics business, State Street Global Exchange, the corporate strategic planning process and managing relationships with State Street's largest global clients. Mr. Klinck also oversees the functions that support client acquisition, retention and development, including the company's cross-organizational sales council, credit services team, marketing, and client data and reporting platforms. He is a member of State Street's Management Committee, the company's most senior strategy and policy-making team.

Mr. Klinck joined State Street in 2006 as global head of its Alternative Investment Solutions business, where he led the strategic direction, global sales and product structuring of State Street's hedge, private equity and offshore fund servicing capabilities worldwide. Under his leadership, the company made three strategic acquisitions that contributed to the steady growth of its alternatives business, including Investors Financial Services Corp. and Palmeri Fund Administrators in 2007. During his tenure, the company also acquired Mourant International Finance Administration in early 2010, further strengthening State Street's position as a world-leading servicer of alternative assets.

Prior to joining State Street, Mr. Klinck held a number of senior executive roles at Mellon Financial Corporation, including vice chairman and president of its Investment Manager Solutions group and chairman for Mellon Europe. Prior to joining Mellon in 1997, he held various senior management positions at Signet Banking and American Express.

Mr. Klinck is a director on the boards of the Boston Symphony Orchestra, the National Association of Corporate Directors, the Boy Scouts of America Boston Minuteman Council and the Courageous Sailing Center. He received a bachelor's degree from Middlebury College and a Master of Business Administration degree from Duke University's Fuqua School of Business.

# Unlocking New Value

Data and technology innovations are transforming the world of finance. As new strategies and business models emerge, the advantage goes to those who can turn information into insight — and opportunity into results.

**For more information, please visit [www.statestreetglobalexchange.com](http://www.statestreetglobalexchange.com).**

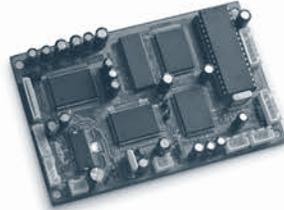
## STATE STREET GLOBAL EXCHANGE<sup>SM</sup>

State Street Global Exchange is the proprietary data, insights, analytics and trading arm of State Street Corporation (NYSE: STT), one of the world's leading providers of financial services to institutional investors.

From  
epiphany



to hot  
property



to household  
name.



SVB Accelerator



SVB Growth



SVB Corporate Finance

We're with you.

**Silicon Valley Bank.** For nearly three decades, we've led the way in recognizing the vast potential in technology and life science companies. From jump starting start ups to global cash management to providing debt and asset management for industry leaders, SVB understands what you do and has the resources to provide what you need. Beyond commercial banking, we offer venture capital services and funds, valuations and analytics, private banking and more. Silicon Valley Bank. *Named one of Forbes' Top 10 Banks three years in a row.* We'll help you find a way, all the way. [svb.com](http://svb.com)

Jack Gaziano, Managing Director  
Phone 617.630.4170 E-mail [jgaziano@svb.com](mailto:jgaziano@svb.com)

Silicon Valley Bank  
275 Grove Street, Suite 2-200, Newton, Massachusetts 02466, [svb.com](http://svb.com)

**Silicon Valley Bank** ▶

©2013 SVB Financial Group. All rights reserved. Member Federal Reserve System. SVB>, SVB>Find a way, SVB Financial Group, and Silicon Valley Bank are registered trademarks. B-13-13120. Rev. 10-17-13.

# HOW COMPANIES EVOLVE WITH M&A

## TRACK 1:

10:30 AM - 11:30 AM GRAND BALLROOM

Mergers and acquisitions continue to be an important strategic tool for companies of all sizes – be it to grow top-line revenue, add new offerings and/or acquire talent. CFOs are often the best placed leaders to ensure M&A is a competitive advantage by anticipating and tackling the pain points in the M&A process. These complexities include attracting ideal companies, ensuring appropriate valuation, communicating with all parties and delivering on operational integration. This session will discuss what it takes for organizations to excel at M&A in the light of these complexities and challenges.



 **tripadvisor®**

**JULIE BRADLEY**  
CFO, TripAdvisor

Julie is responsible for overseeing corporate finance, investor relations, accounting, corporate development, human resources, and real estate at TripAdvisor. Julie previously served as senior vice president and chief financial officer of Art Technology Group (ATG), where she was responsible for managing all financial activities, investor relations, and global infrastructure. During her tenure, she guided the company to profitable revenue growth and ultimately oversaw the acquisition of ATG by Oracle. She was also named 2010 CFO of the Year Award Honoree by the Boston Business Journal. Prior to joining ATG, Julie was vice president of finance at Akamai Technologies. She started her career at Deloitte. Julie currently serves on the board of Wayfair ([www.wayfair.com](http://www.wayfair.com)), Judge Baker Children's Center, and previously served on the board of Exact Target ([www.exacttarget.com](http://www.exacttarget.com)). She is a Certified Public Accountant and holds a BA in Economics from Wheaton College.



**CREDIT SUISSE** 

**JAMES DISNEY**  
Managing Director, CreditSuisse

James Disney runs East Coast Software and Mobile Payments coverage for Credit Suisse's Technology Investment Banking franchise based in New York.

James has been a Technology banker with CS since 1999 in Hong Kong, Silicon Valley, Sydney where he ran Australian TMT coverage and New York where he's lived for the last 4 years.

James has completed over 50 IPOs and equity offerings, over \$50bn of M &A transactions for buyers and sellers and over \$40bn in LBOs and private equity debt financings including 3 of the 4 largest Tech LBOs.

James speaks Mandarin and French, lives in Manhattan with his wife and daughter and is an avid follower of Australian Rules Football.



**Gartner**

**CRAIG SAFIAN**

SVP & CFO, Gartner

Craig Safian is senior vice president and chief financial officer at Gartner. Craig joined Gartner in 2002. He has held numerous leadership positions in the company including: group vice president of global finance strategy & corporate development, group vice president of strategy, and managing vice president of financial planning & analysis. Prior to Gartner he held finance positions at Headstrong (now part of Genpact) and Bristol-Myers Squibb, and was an accountant for Friedman, LLP.

Craig holds a bachelor's degree from Rutgers College and a MBA with a concentration in Finance from the Goizueta Business School at Emory University. He also achieved CPA licensure in the State of New York.



**ANALOG  
DEVICES**

**DAVID ZINSNER**

CFO & VP of Finance, Analog Devices

Mr. David A. Zinsner, also known as Dave, has been the Chief Financial Officer and Vice President of Finance of Analog Devices Inc. since January 12, 2009. Mr. Zinsner served as the Chief Finance Officer of Intersil Corp. from July 1, 2005 to December 2008 and served as its Senior Vice President from 2005 to December 2008. Mr. Zinsner served as Vice President and Assistant Secretary of Intersil Corp. since July 1, 2005 and also served as its Principal Accounting Officer. At Intersil, he served various positions of increasing responsibility spanning the areas of accounting, finance, investor relations and treasury, strategic planning, corporate M&A, and information technology. Mr. Zinsner served as Treasurer and Corporate Controller of Intersil Corp., where he was responsible for Intersil's finance departments, including planning, accounting, external reporting, operations finance, treasury, tax and risk-management. During his tenure, Mr. Zinsner completed a variety of key executive assignments, including leadership roles in the assimilation of recent acquisitions. Prior to Intersil, he served international finance and treasury management positions at Harris Corporation MCI Communications, and Mellon Financial Corporation. He graduated from the Owen Graduate School of Management at Vanderbilt University, with a Master's Degree in Business Administration in 1996. He graduated from Carnegie Mellon University with a Bachelors of Science Degree in 1991, where he majored in Industrial Management.

**MODERATOR**



**McKinsey & Company**

**ANDY WEST**

Director, McKinsey & Company

Andy is a principal in McKinsey's Boston office, where he serves clients in a range of industries including software, consumer electronics, medical equipment, and life sciences. Within McKinsey, he leads the Corporate Finance Practice's work on M&A, divestitures, and joint ventures and the Organization Practice's work on merger management in the Americas.

Andy has extensive experience of helping clients improve performance across the transactions value chain from strategy and sourcing through to diligence and integration. In addition, he has led our support for several clients in driving large-scale commercial transformations through M&A, including salesforce redesign, marketing integration and strategy, building capabilities for enterprise selling, and driving cross-selling. He has also helped clients build M&A and integration capabilities.

As part of his work on global mergers, acquisitions, divestitures, and joint ventures, Andy helps senior executives realize the greatest possible value from transactions, large-scale transformations, and turnarounds. He has worked extensively in the Americas, Europe, and Asia.



# YOU WON'T BE THE FIRST COMPANY TO SOAR WITH TODAY'S ERP. JUST DON'T BE THE LAST.

Over 20,000 organizations worldwide run NetSuite's cloud-based business software. They're getting powerful financials, CRM, ecommerce and more, built for today's business. That means real-time insight into business performance and streamlined processes, so they grow more efficiently. With NetSuite, they've eliminated the headaches of hardware and software maintenance, so they can focus on running their business, not their IT. That's why NetSuite is the business software for today's business.



See why so many companies soar with the #1 cloud ERP software at [NetSuite.com/soar](https://www.netsuite.com/soar)

# DEVELOPING AN EFFECTIVE DATA AND ANALYTICS STRATEGY

Big data and advanced analytics is a disruptive force reshaping business models and entire industries. CFOs are increasingly taking a leadership role in developing strategies to harness this power for strategic business insights and capital allocation.

Developing an effective data and analytics strategy requires care and commitment across your organization and its network of partners and vendors. This calls for new skills and a keen understanding of how to manage and leverage data as a strategic asset.

CFOs can play a key role in this process by ensuring that analytics are focused on the right priorities and that the appropriate resources are allocated to achieve success—whether that means enhancing productivity, gaining a clearer, more real-time sense of customer behaviors and trends, or creating entirely new businesses or revenue streams.



For more information, please visit  
[www.statestreetglobalexchange.com](http://www.statestreetglobalexchange.com).

**STATE STREET**  
**GLOBAL EXCHANGE**<sup>SM</sup>

## SIX COMPONENTS OF AN EFFECTIVE STRATEGY

### OBJECTIVES

Know what you're trying to solve.

### PROCESS

Aggregating, integrating and managing the data is critical. Garbage in means garbage out.

### INFRASTRUCTURE

Build a scalable data infrastructure that can grow with your evolving business.

### PEOPLE

Build the right team of people who both understand the data and can explore, analyze and extract insight from it.

### CULTURE

Establish a culture of continuous innovation and learning.

### COLLABORATION

Leverage the speed, scale, breadth and expertise of partners and vendors to provide non-differentiating elements of your data and analytics solution.

# WHEN FINANCE MEETS COMMUNICATIONS

## TRACK 2:

10:30 AM - 11:30 AM SALONS FGH

The role of effective communicator falls squarely on the shoulders of the CFO. Whether the audience is internal or external, the financial executive has an important role in the communication of business results. The CFO must be able to deliver good news such that expectations are not set too high, and must have the skills to share bad news such that the appropriate context is provided. The financial executive must also be able to receive both good and bad news – ensuring that direct reports and cross-functional leaders perceive an open channel so that early action can be taken as needed. Connect with this outstanding panel as they share insights into excellence in financial communications.



**iRobot®**

**ALISON DEAN**  
EVP & CFO, iRobot

Alison Dean has more than 25 years of extensive financial experience in the technology and consumer industries. She has served on iRobot's finance team in a variety of executive positions since 2005, including senior vice president of corporate finance and principal accounting officer and vice president of financial controls and analysis. Prior to joining iRobot, for 10 years Dean served in a number of senior positions at 3Com Corporation, including vice president and corporate controller and vice president of finance for worldwide sales. She holds a bachelor's degree in business economics from Brown University and a master's degree in business administration from Boston University.



**unidesk**

**MARY JEFTS**  
CFO, Unidesk

Mary Jefts has over 20 years of financial leadership experience with both public and private companies, primarily in the technology sector. Currently, Mary Jefts serves as Unidesk's Chief Financial Officer where she joined in February 2014. At Unidesk, Mary is responsible for all finance, legal, human resource and administration functions. Prior to Unidesk, Mary was Chief Financial Officer at Acquia from November 2011 to June of 2013, and was instrumental in leading the company through its explosive growth. Prior to Acquia, Mary was a Business Unit Executive in the Business Analytics Division at IBM from October 2010 to November 2011, with global responsibility for sales, marketing, services and development. Mary joined IBM with the acquisition of OpenPages where she was Chief Financial Officer from September 2005 until October 2010. Mary has also held financial leadership positions at Netegrity, Prime Response and PhyMatrix, all of which were publicly traded companies. Mary began her career at PwC where she attained her CPA. Mary holds a BS in Accounting from Bentley University.



**DAN MATLOFF**  
CEO, TEM Capital

Dan is a high tech CFO, providing hands-on financial leadership to multiple technology companies in the portfolio of Boston-based TEM Capital. Dan focuses on corporate strategy, deal structuring, and capital raising, working directly with the CEOs of TEM's growth-stage energy and materials businesses. Dan also handles the CFO responsibilities of the TEM Capital private equity funds.

Prior to joining TEM in 2013, Dan was CFO of 1366 Technologies, a solar tech manufacturer at which he played a key role in negotiating a \$150M project finance facility. Before joining 1366, Dan served as Corporate Controller of Hittite Microwave Corporation (NASDAQ: HITT), a manufacturer of high performance integrated circuits. He joined Hittite in advance of its 2005 IPO, and successfully scaled its finance function as it grew revenues from \$60 million to \$244 million and a market cap of \$1.9B. His prior experience includes positions of increasing responsibility at Millennium Pharmaceuticals, Thermo Fisher Scientific, and PricewaterhouseCoopers.

Dan is a CPA and a graduate of Bentley University.



**MELINDA SMITH**  
CFO, Paydiant

Ms. Melinda Smith is responsible for leading Paydiant's financial and administrative operations including financial reporting and control, investor relations, human resources, risk management and legal affairs. Ms. Smith has more than 20 years of experience in financial administration and operations in the high technology industry. Most recently, Ms. Smith was Chief Financial Officer at expressor software corporation where she led its financial operations from 2008 until expressor was acquired by Qlik Technologies, Inc. (Nasdaq: QLIK) in 2012. As Chief Financial Officer of edocs, Inc., she led the financial initiatives related to edocs' rapid growth and expansion into worldwide markets until edocs was acquired by Siebel Systems in 2004. Previously, Ms. Smith served as Director of Finance at Aspen Technology (Nasdaq: AZPN) where she held several positions including managing its financial and billing operations and its business process and controls group with oversight for process improvement and the Sarbanes Oxley program. Earlier in her career, she also served as Vice President of Finance at Gradient Technologies and worked in public accounting as an Audit Manager at Price Waterhouse in the high technology practice group. Ms. Smith holds a Bachelor's Degree in Business Administration from the University of Michigan.

**MODERATOR**



**MICHELLE HANLON**  
Professor of Accounting, MIT Sloan School of Management

Michelle Hanlon is the Howard W. Johnson Professor and Professor of Accounting at the MIT Sloan School of Management. She is the Chair of the Accounting Group and the Chair of the Undergraduate Education Committee for Sloan. She also serves as an editor at one of the leading accounting research journals, The Journal of Accounting and Economics.

Professor Hanlon earned her Ph.D. from the University of Washington in 2002 and prior to that worked at KPMG LLP. She teaches Taxes and Business Strategy to Sloan students. She has also taught financial accounting (introductory and intermediate levels) to undergraduates, masters of finance students, and MBA students. She also teaches executive education courses at Sloan and a Ph.D. seminar. Professor Hanlon recently received Sloan's prestigious Jamieson Prize for Excellence in Teaching. Her research spans both tax areas and financial accounting areas. She has presented her research at many universities, conferences, and policy forums. Her work has been published in a variety of academic journals and she has won several awards for her research. In 2012, Professor Hanlon testified in two separate hearings before the U.S. Senate Committee on Finance and the U.S. House of Representatives Committee on Ways and Means about U.S. corporate tax policy.

# FUTURE FORWARD FINANCIAL LEADER

## LUNCHEON KEYNOTE:

12:15 AM - 1:15 PM GRAND BALLROOM



**DAVID HERZOG**  
EVP & CFO, AIG

Mr. Herzog joined American General in February 2000 as Executive Vice President and Chief Financial Officer of the Life Division. Following AIG's acquisition of American General Corporation in 2001, he was also named Chief Operating Officer and Chief Financial Officer for the combined domestic life insurance companies. He was elected Vice President, Life Insurance for AIG in 2003 before being named Vice President and Chief Financial Officer, Global Life Insurance in 2004. In 2005, Mr. Herzog was named Comptroller, an office he held until October, 2008 when he was appointed to his current position.

Prior to joining American General, Mr. Herzog held numerous positions at General American Life Insurance Company. He was Chief Financial Officer of GenAmerica Corporation, the parent company of General American and Reinsurance Group of America. Prior to joining General American, Mr. Herzog was Vice President, Controller, for CitiCorp Life Insurance Companies and an Audit Supervisor with Coopers & Lybrand.

Mr. Herzog holds a bachelor's degree in accountancy from the University of Missouri-Columbia and an M.B.A. in Finance and Economics from the University of Chicago's Graduate School of Business. Additionally, he has attained the designations of Certified Public Accountant and Fellow in the Life Office Management Association.

Mr. Herzog serves on the University of Missouri-Columbia Trulaske College of Business Strategic Development Board. He has also served on the Board of Trustees of the American College, The Logos School and the University of Missouri School of Accountancy Advisory Board. In 2011, Treasury & Risk magazine named Mr. Herzog as one of the 100 most influential people in finance. In 2014, buy-side analysts named Mr. Herzog second-best Insurance CFO in the Institutional Investor magazine annual survey.



**DENNIS HICKEY**  
CFO, Colgate-Palmolive

Mr. Hickey assumed the role of CFO, Colgate-Palmolive Company in January 2011. He is a 37-year veteran of this leading consumer products company.

Prior to being named CFO, Mr. Hickey was Vice President and Corporate Controller and was elected a Corporate Officer. He guided Colgate's budgeting, accounting and financial reporting operations and developed a strong financial team closely aligned with its business partners.

Previously he was Executive Vice President, Finance for Colgate North America. Under his leadership, significant improvements were made in productivity, teamwork, process change, working capital and business analytics, and the organization achieved record levels of profitability and cash generation.

His career at Colgate has encompassed positions of increasing responsibility at the subsidiary, Internal Audit and Corporate levels. Those roles have included, Chief Financial Officer of Riviana Foods, Inc., a former Colgate subsidiary and Vice President, Finance of Colgate Europe.

Mr. Hickey received a bachelor's degree from Baruch College and is a CPA.

Outside of Colgate, Mr. Hickey is an active member of the American Institute of CPAs, the NY State Society of CPAs, and Financial Executives International. He also serves on the Dean's Council for the Zicklin School of Business at Baruch College and is active in the greater New York area United Way and Baruch College Executives on Campus.



**BRIAN TIERNEY**  
EVP & CFO, American Electric Power

Brian Tierney is executive vice president and chief financial officer for American Electric Power, one of the largest electrical utilities in the United States, delivering electricity to more than 5 million customers in 11 states. He reports to Nick Akins, chairman, president and chief executive officer.

Previously, he was executive vice president - AEP Utilities East, responsible for the distribution, customer service, and financial performance of AEP's utility operating companies in the states of Indiana, Kentucky, Michigan, Ohio, Tennessee, Virginia, and West Virginia.

Prior to assuming that position in January 2008, Brian was the senior vice president of Commercial Operations, where he was responsible for AEP's energy trading and marketing activities, as well as market operations and dispatch of the company's 38,000 MW generation fleet.

Brian joined AEP in 1998 and has held a number of management positions responsible for pricing energy transactions, market operations, and trading and marketing. From 2001-2002, Brian served on the Board of Directors of ERCOT (Electric Reliability Council of Texas).

Brian has a bachelor of arts degree in history from Boston College and an MBA from the University of Chicago with concentrations in finance and accounting.



**KARYN OVELMEN**  
CFO, LyondellBasell

Karyn Ovelmen is chief financial officer for LyondellBasell, one of the world's largest plastics, chemicals and refining companies.

She has oversight of the global Finance organization including the Controller's, Treasury, Tax, Risk/Audit, Financial Planning and Analysis as well as Information Technology groups.

Ovelmen most recently served as Executive Vice President and CFO of Petroplus Holdings AG, Europe's largest independent refiner and wholesaler of petroleum products. She also served as Executive Vice President and CFO of Argus Atlantic Energy.

Prior to that, Ovelmen served as Vice President of External Reporting and Investor Relations for The Premcor Refining Group Inc. She also spent 12 years with PricewaterhouseCoopers, primarily serving the energy industry.

Ovelmen is a member of the Board of Trustees of the United Way of Greater Houston and serves on the audit committee.

Ovelmen received a Bachelor of Arts degree from the University of Connecticut. She is a Certified Public Accountant.



**CAROL MASSAR**  
Anchor, Bloomberg

Carol Massar is the Chief National Correspondent for Bloomberg Television and co-host of "Taking Stock" on Bloomberg Radio. Massar provides in-depth coverage and analysis of major economic and business trends across Bloomberg's media platforms, including in-depth reporting on global corporations.

An award-winning journalist with 20 years of experience, Massar joined Bloomberg Television in 1999. During her time at Bloomberg, Massar has anchored and reported around the globe including from the World Economic Forum in India, APEC Women and the Economy Summit, World Business Forum, MIT Sloan - CFO Summit, the New York Stock Exchange and NASDAQ. She has interviewed major investors and leaders in business, economics, government and philanthropy including Coca-Cola CEO Muhtar Kent, The Walt Disney Co. CEO Robert Iger, Pixar Chief Creative Officer John Lasseter, DuPont CEO Ellen Kullman, Caterpillar CEO Doug Oberhelman, Templeton Emerging Markets Group Executive Chairman Mark Mobius, investor Carl Icahn, Nobel laureates Joseph Stiglitz and Paul Krugman, and Melinda Gates and Eli Broad.

In 2006, Massar anchored "The Ethanol Fix - Breaking America's Addiction to Oil," which won numerous awards including the National Gracie Award from the American Women in Radio and Television. In 2012, she was recognized by the New York Press Club for her series "Race for the Next Facebook" and in 2013 for her special "Inside Disney" stories.

Massar began her career as a producer at the Financial News Network. She later served as a producer, reporter and anchor for Dow Jones Television which aired in the U.S., Asia and Europe.

Massar earned a degree in economics from Barnard College/Columbia University, where she also delivered business news over Columbia's radio waves.



## Investing in ideas to empower today's CFO.

**Credit Suisse is proud to sponsor the 12th annual MIT Sloan CFO Summit.**

We believe investing in interactive learning and thought-provoking discourse about the future of finance, accounting and business is one of the best investments we can make. To learn more about Private Banking North America, please contact Jeremy Seidman, 617 856 3041 or [jeremy.seidman@credit-suisse.com](mailto:jeremy.seidman@credit-suisse.com).

**[credit-suisse.com](http://credit-suisse.com)**

# Have Increased Confidence in Your Team.

Having reliable staff that work from the correct set of core competencies is proving to be challenging in the area of FP&A. Be certain your team possesses the right skills to represent the finance department at a strategic level.

Nominate your staff to become  
FP&A credential holders.

**[www.FPACert.org/Nominate](http://www.FPACert.org/Nominate)**

---

## **Upcoming Testing Window**

February 1, 2015 - March 31, 2015

## **Early Application Deadline**

November 21, 2014

---



# BOSTON'S ONLY BUSINESS RADIO.

Get the latest on the economy,  
financial markets, politics, tech  
and more, plus all the local news,  
weather, traffic and sports.

**LISTEN NOW:**

**1200 AM**

**SiriusXM 119**

**BloombergRadio.com**

**Bloomberg Radio+ Mobile App**



**Bloomberg**  
**RADIO**

**BOSTON**

**1200 AM**



# What's next in your career?

New Corporate Role

Entrepreneurial Venture

Board Membership

Consulting

Career Change

Non-Profit Leadership

*Essex & Partners*

TRUSTED ADVISORS TO SENIOR EXECUTIVES

COME SEE WHAT'S NEXT.

[WWW.ESSEXPARTNERS.COM](http://WWW.ESSEXPARTNERS.COM)

# PEOPLE DRIVING PROFIT

## TRACK 1:

1:30 PM - 2:30 PM GRAND BALLROOM

As every successful CFO knows, a well-run financial operation depends on the team first and foremost, with spreadsheets a trailing second. However, with the workforce continuing to evolve, so too has the role of CFO as talent manager and some have got it better than others.

Millennials, digital natives, increased diversity and global infrastructure are all aspects of this changing landscape within the finance department. The CFO role is also uniquely cross-functional, encompassing work with professionals across all disciplines including sales, engineering, customer support, etc. With the human factor so important, this panel will review best practices for optimizing employee engagement and success.



**MURRAY FISH**

CFO, New England Tea & Coffee

Murray Fish is an experienced Chief Financial Officer with a record of building value by growing, packaging or restructuring retail food products and service, software and manufacturing companies who keeps his finger on the pulse of the business to ensure that there are “No Surprises”. His professional skills include:

- Excellent financial and technical skills including SEC reporting and revenue recognition.
- Solid record of implementing and improving scalable systems that align with business strategy.
- Significant capital raising experience having led two IPO’s, a secondary and private offerings.
- Extensive M&A experience completing and then integrating the companies into the business.
- Excellent negotiating and contracting skills ensuring correct revenue recognition treatment.
- Extensive compliance experience in SOX, data security, HIPAA, GLB and XBRL.



**JAMES HARLAND**

COO & CFO, SilverRail Technologies

In his wide-ranging role at SilverRail, James covers things from Finance and reporting, through managing relationships with current accounts, as well as marketing across the business.

From his time working in London, James brings a wealth of strategic and financial experience to SilverRail. James began his career in consulting, working on a number of pan-European growth and distribution strategies. He then moved to ECI Partners, working as a private equity investor, including assessing a number of online travel businesses.

James holds engineering degrees from Cambridge University and an MBA from MIT Sloan School of Management, where he was a Siebel Scholar and Seley Award winner.



**STEVE LIFSHATZ**

CFO, Fleetmatics

Mr. Lifshatz has over 25 years of executive-level experience at a wide range of technology and software companies. He has led both entrepreneurial and public companies with extensive experience in operational cost-cutting, mergers and acquisitions, public offerings and investor relations. Mr. Lifshatz most recently served on the Board as a Director at AMICAS, Inc. (NASDAQ: AMCS), a provider of imaging IT solutions for imaging centers, ambulatory care facilities and radiology practices. During his time at AMICAS, the company agreed to be acquired by Merge Healthcare (NASDAQ: MRGE). Mr. Lifshatz also held the position of CFO for Lionbridge Technologies Inc. (NASDAQ: LIOX) where he led their initial public offering and helped accelerate growth through significant M&A activity.



**DENA UPTON**

Director, People & Talent, LogMeIn

Dena is the Director of People and Talent at LogMeIn. "A big part of attracting the best and the brightest talent from the very competitive global tech scene is to provide great careers that take into account every aspect of the working environment. That means in addition to offering exceptional workspaces, like our Boston and Budapest offices, we must provide great benefits, competitive salaries and a work/life balance that empowers our employees to be their best. It doesn't hurt that we have a history of offering very, wildly popular and market disrupting technology that people are excited to build and sell." How do we keep our people engaged, challenged as we continue to grow and scale the organization? – this is her biggest challenge. My team works to combat that challenge every day.

**MODERATOR**



**DAN DENISCO**

SVP, Robert Half Management Resources

Dan DeNisco is the Senior Vice President for North American operations of Robert Half Management Resources, a division of Robert Half International Inc. and the world's premier provider of senior-level accounting, finance and business systems professionals on a project and interim basis. Dan is headquartered in Tampa, Florida.

Since joining RHI in 1985 as a Recruiting Manager, Dan has held several highly visible positions within the company including Area Manager for Upstate New York and Southeastern Canada, Regional Manager for the Mid-Atlantic and Senior Regional Manager for the Carolinas, Georgia and Florida.

In 1975, Dan began his career in Buffalo, N.Y. at J.D. Elliott & Co. CPAs. During his ten years with the large CPA firm, he worked as a Staff Accountant, a Senior Manager and became a Partner and a shareholder.

Dan has a B.S. degree in Accounting from SUNY at Buffalo and is an inactive licensed CPA in New York State.

rh

What should I pay a senior-level  
Financial Analyst in Boston?

How do I recruit the  
best employees?

YOU ASK. WE ANSWER.

For insight into financial salaries, trends and hiring from the industry's leading staffing firm, visit the Robert Half Salary Center: [roberthalf.com/salarycenter](http://roberthalf.com/salarycenter).



1.888.400.7474  
[roberthalfmr.com](http://roberthalfmr.com)

**rh** Robert Half®  
Management Resources

**KPMG**  
cutting through complexity

## Helping you achieve your vision in a changing world.

Chances are the world was a different place when you started your business. The pressure to deliver in this complex environment can be challenging, but that doesn't mean you have to abandon your vision. It only means it's more important than ever to work with the right business adviser. KPMG LLP's Private Markets Group can help you achieve your strategic objectives throughout any stage of the business life cycle.

[kpmg.com](http://kpmg.com)

**Learn more**

Visit [kpmg.com/us/privatemarketsgroup](http://kpmg.com/us/privatemarketsgroup)

Ed Sullivan  
Boston Private Markets Group Leader  
[easullivan@kpmg.com](mailto:easullivan@kpmg.com)  
617- 475 4701



Employee Benefits and Administration

Payroll Processing

Integrated Solutions

HRIS Implementation and Support

Human Resource Services



Stop by Our Booth to Learn How We Can Help You:

- Reduce Administrative Expenses
- Minimize Legal Risk
- Improve Efficiencies
- Enhance Employee Service

+1.508.339.1300 | [www.hrknowledge.com](http://www.hrknowledge.com)



T3 Advisors

EXPECT MORE FROM THE SUPER HERO OF COMMERCIAL REAL ESTATE



**Super GoPro GIVEAWAY!**

Stop by the T3 booth and enter for your chance to win one of **two GoPro cameras!**

**BE YOUR COMPANY'S HERO.**  
A HIGH PERFORMANCE WORKPLACE STARTS WITH US.

**T3advisors.com** Global Corporate Real Estate Solutions

Winners Announced at Cocktail Reception

# KPIs AND NUMB3RS:

## THE EVOLVING ART OF MEASUREMENTS AND METRICS

### TRACK 2:

1:30 PM - 2:30 PM SALONS FGH

With today's accelerating technology, success is determined, not just measured, by the fundamental key performance indicators of a company. Our panelists will discuss how they identify, quantify, interpret and act on the KPIs unique to their businesses. No one ever said business is fair, so come equip yourself with the latest trends, techniques and tools to gain a competitive advantage.



**intronis**  
cloud backup + recovery

**JACQUELYN BARRY HAMILTON**  
CFO, Intronis

As CFO, Jackie manages Intronis' finance function and partners with our operating managers to help deliver our world-class backup solution. She joins the company from Monster Worldwide, where she was divisional CFO of Monster Worldwide Technologies and, prior to that, a corporate finance vice president. A veteran of the IT services market, Jackie was CFO of Corporate Software, where she led financial operations and managed its successful acquisition by Level 3 Communications. Following the purchase, Hamilton served as senior vice president of the Information Services Group of Level 3 Communication.

A graduate of Simmons College, Jackie received her master's degree in finance from Boston College.



**NATIONAL AMUSEMENTS**

**MICHAEL KSZYSTYNIAK**  
CFO, National Amusements

Michael Kszystyniak is a financial executive with Big Four and private industry experience. He is experienced with public and privately held companies both domestic and international. Functional experience includes accounting, treasury, tax and administration as well as the implementation of financial systems and the operation of troubled companies in and out of Bankruptcy Court. His specialties include debt restructuring, Improving business processes, oversight of financial accounting and income tax examinations, mergers and acquisitions, building business teams to accomplish well defined goals.



**DORVIN LIVELY**  
CFO, Planet Fitness

Dorvin Lively joined Planet Fitness as Chief Financial Officer in July 2013. Lively, a 30-year veteran of corporate finance for various retail and consumer-products companies, leads the Company's finance, treasury, financial planning and supply chain functions, as well as strategic and long-term planning.

Prior to joining Planet Fitness, Lively served as Executive Vice President, Chief Financial Officer and Chief Administrative Officer for RadioShack Corporation. In these positions, Lively led the company's finance, treasury, financial planning, investor relations, supply chain and dealer franchise functions. Prior to RadioShack, Lively served as Chief Financial Officer at Ace Hardware Corp. His experience also includes previous positions at Maidenform Brands, Toys R Us, Reader's Digest and Pepsi-Cola International. Lively is a Certified Public Accountant and received his Bachelor's Degree from the University of Arkansas.

Dorvin is married and has three adult children. Growing up on a farm in Arkansas, he enjoys many outdoor activities including, golf, hunting, and running.



**DAVID STACK**  
CFO, Localytics

Prior to joining Localytics David Stack was CFO of HubSpot. David was responsible for implementing all accounting and finance related activities to support the growth of the company from a \$1M Revenue run rate to \$100M. Prior to Hubspot David was VP of Finance at EMC Corporation. He was responsible for all financial and information system activities in the Security Division, a business unit within EMC responsible for \$500 million in revenue. Prior to EMC, David held several senior finance positions for RSA Security, including VP of Finance. David was the finance lead for RSA Security during the sale of the company to EMC for \$2.3 billion in 2006.

David has 20 years of experience within the accounting and finance field. During his career he has overseen many functions including financial planning, general accounting, revenue recognition, investor relations, and information systems.

David holds a BS in Accounting from Florida Southern College and an MBA from the University of Central Florida. He also completed the Program for Leadership Development, targeting high potential leaders, at the Harvard Business School Executive Education Program.

**MODERATOR**



**BRIAN KALISH**  
Director, Finance Practice Lead,  
Association for Financial Professionals

Brian Kalish joined the AFP in October 2008. Mr. Kalish has responsibility for the Finance Practice which includes Corporate Finance, Risk Management, Capital Markets, Investor Relations, Financial Planning & Analysis, Accounting and Financial Reporting.

Mr. Kalish has over 20 years experience in Finance, Treasury and Investor Relations. Prior to joining AFP, Mr. Kalish held a number of treasury and finance positions with the Federal Home Loan Bank - Office of Finance, Washington Mutual, NRUCFC, Fifth Third Bank and Fannie Mae.

Mr. Kalish is a graduate of Georgia Tech and holds a Bachelor of Science, Management degree.

# GROWING SMART: MANAGING INFLECTION POINTS

## TRACK 1:

2:30 PM - 3:30 PM GRAND BALLROOM

Predicting the future may be easy, but boy is it difficult to know when it's going to happen. Nevertheless, successful CFOs need to make timely decisions about expanding capacity, upgrading technology, hiring new employees, extending office space and adding assets. Expand too soon and you've misspent capital, invest too late and you've missed an opportunity. Our panel of CFOs will discuss the processes they use to manage inflection points including the leading indicators, quantitative measures and qualitative insights. Come learn the art and science of growing smart, when the alignment of investment and opportunity equals the cadence of success.



**GARY DICAMILLO**

Managing Partner, Eaglepoint Advisors

Gary T. DiCamillo is Managing Partner for Eaglepoint Advisors, a turnaround management and advisory firm based in San Francisco and Boston. In his role, Mr. DiCamillo advises private equity and other financial sponsors on turning around underperforming and distressed companies, leveraging his 28 years of turnaround management experience.

Prior to Eaglepoint, Mr. DiCamillo was the President and CEO of Advantage Resourcing (US and UK), a group of privately held technical, professional and commercial staffing companies, where he grew revenues from \$800 Million to \$1.5 Billion.

Previously, he was Chairman and CEO at the Polaroid Corporation; President of Worldwide Power Tools and Accessories at Black & Decker Corporation and VP/General Manager for Culligan U.S.A., a division of Beatrice Corporation. He began his career at Procter & Gamble Co., followed by several years as a manager at McKinsey & Company.

Mr. DiCamillo is a board member of the Whirlpool Corporation, Pella Corporation, Universal Trailer Corporation, Berkshire Manufactured Products and The Sheridan Group, Inc. He serves on the boards of trustees at Rensselaer Polytechnic Institute, Babson College, the Museum of Science in Boston and the Massachusetts Business Roundtable.

Mr. DiCamillo is a 1975 graduate of Harvard Business School where he earned an MBA. He holds a BS in Chemical Engineering from Rensselaer Polytechnic Institute.



**JIM ELIASON**

CFO & Treasurer, Datawatch

As chief financial officer and treasurer, James Eliason is responsible for all aspects of the company's financial strategy and operations. Jim brings 20 years of experience to the Datawatch leadership team, including corporate finance, investor relations, sales operations, mergers and acquisitions, human resources and information technology. Prior to joining Datawatch, Eliason served as CFO of Qvidian Corporation, an enterprise software company that provides cloud-based sales enablement and analytics applications. From 2008 to 2011, he served as CFO of Deskstone, Inc., a SaaS software company that provides a desktop cloud enablement platform. From 2004 to 2008, he served as CFO of Empirix, Inc., a high growth technology company that provides analytic tools for voice and data applications. Earlier in his career, he held senior finance positions with Narad Networks, Inc. and Silverstream Software, Inc. Jim spent four years at Arthur Andersen & Company in the audit practice and has been a certified public accountant.



**JOHN GAVIN**

CFO, Acacia Communications

John is currently CFO at Acacia Communications Inc. Acacia is a leading provider of advanced 100G coherent fiber optic transceiver technology utilized by telecommunications and data communications service providers around the world to increase communications bandwidth necessary to meet the rapid growth in Internet network traffic. Acacia was recently named by INC magazine as the 5th fastest private growth company in their annual INC 500 survey listing. John is responsible for finance, accounting, treasury, human resources, corporate planning, facilities and general administration.

John has spent 33 years working in the high tech industry. He started his technology career at Digital Equipment Corporation/Compaq where he worked in technology focused business units during his 17 year career there. John's last assignment was serving as Vice President Finance, Sales and Marketing for North America. After Compaq, John spent the last 16 years teaming with leading entrepreneur's and venture capital firms to formulate market and business strategies, drive growth and was responsible to oversee the management of successful exits and mergers for a variety of technology start-up companies. John served as CFO at C-Port Communications (acquired by Motorola), CFO-Pirus Networks (Acquired by Sun Microsystems/Oracle), CFO/COO SMaL Camera Technologies (acquired by Cypress Semiconductor), COO and acting CEO Akorri Inc. (acquired by NetAPP) and Hiperos LLC (acquired by Opus Global).

John is a graduate of Stonehill College with a Bachelor of Science degree in Finance and Accounting and has a MBA from Anna Maria College. John serves on advisory Boards of non-profit organizations serving Central Massachusetts.



**JO TANGO**

Partner, Kepha Partners

Jo Tango founded Kepha Partners. He has invested in the e-commerce, search engine, Internet ad network, wireless, supply chain software, storage, database, security, on-line payments and data center virtualization spaces.

He has been a founding or first institutional investor in Azuki Systems (acquired by Ericsson), Bit9, ExaGrid, Paradigm4, StreamBase Systems (acquired by Tibco), Vertica Systems (acquired by HP), Virtual Iron (acquired by Oracle) and VoltDB, getting involved nearly always at the company inception phase. Other investments include Ask Jeeves (Nasdaq: ASKJ), Digital Market (acquired by Agile Software), and NextCard (Nasdaq: NXCD).

Jo previously was a General Partner at Highland Capital Partners, and before that at Bain & Company.

Jo attended Yale University (B.A., summa cum laude and Phi Beta Kappa) and Harvard Business School (M.B.A., Baker Scholar). He is on the New England Venture Capital Association Board, and was for 10 years on the board of NECINA (New England Chinese Information and Network Association). He has served as Co-Chair of his Harvard Business School class reunions and was on the leadership team for his Yale 20th reunion.

Jo is passionate about start-ups and loves working with entrepreneurs who dare to strive. Jo and his family emigrated from Indonesia with a few suitcases and \$1,500.

**MODERATOR**



**DAN ALLRED**

Market Manager, Silicon Valley Bank

Dan Allred is a Market Manager with Silicon Valley Bank. In this role, he leads a team of bankers working with hundreds of early-stage 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. He is also Board member and Treasurer for The Capital Network, a resource for New England entrepreneurs seeking early-stage financing.

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.



**With a schedule like yours,  
where do you find the time to get ahead?**

**Stay on the cutting edge with programs designed with your busy schedule in mind.**

*Program topics include:*

- Neuroscience
- Entrepreneurship
- Finance
- Marketing
- Globalization
- Supply Chain
- Innovation
- Productivity
- Macroeconomics
- Leadership
- Strategy
- Systems Thinking
- Negotiation
- Technology
- Collective Intelligence

### **MIT Sloan CFO Summit Attendee Discount**

Receive a 15% tuition discount on any of our open enrollment programs held in Massachusetts offered through 4/30/2015. To take advantage of this offer, enter referral code: EECFO15 on the program application. (Cannot be combined with other offers.)



<http://executive.mit.edu/cfo>  
+1.617.253.7166 | sloanexeced@mit.edu

# **PREDICTIVE PROACTIVE BUSINESS- MINDED**



At Nixon Peabody, we're constantly thinking ahead about your business, bringing together the knowledge, experience and connections of 600+ attorneys. We complete the transaction, resolve the dispute, win the trial. Whatever the industry, wherever our clients need us.

**We're more than legal counsel.  
We're partners in your success.**



100 SUMMER STREET | BOSTON, MA | 617-345-1000  
NIXONPEABODY.COM | @NIXONPEABODYLLP



**You Can Listen To Us About  
How Well We Generate Results. Or Better Still,  
Listen To Our Clients.**

*"When we first started the MIT Sloan CFO Summit (before Warner's involvement) we didn't pay for strategic PR efforts...and it showed. But given what Warner has helped us achieve over the last three years, we are glad to make the investment because we see enormous return. From record-breaking attendance year after year to coverage in CFO Magazine, Reuters, Bloomberg, and Fox Business News, to name a few ... All great results. Great job, as always."*

-Jack McCullough,  
Co-Chair, The MIT Sloan CFO Summit

*"Warner delivers results! Their experts have an understanding of our business no other PR firm has been able to achieve."*

-Linda Rigano, Executive Director,  
Media Relations, ThomasNet

*"We always feel like we're your only clients.  
Working with your team is a real dream."*

- Anthea Stratigos, CEO & Founder,  
Outsell, Inc.

*"Thank you for your exceptional  
support and guidance!"*

- Joe Petrowski, Managing Partner/Founder,  
Mercantor Partners



Brands Made Newsworthy

**Proud public relations agency partner for the MIT Sloan CFO Summit  
and MIT Sloan CIO Symposium since 2006.**

**Ask us about our #StrategicSocial™ social media offering.**

[www.warnerpr.com/letsconnect](http://www.warnerpr.com/letsconnect) 978-526-1960 [carin@warnerpr.com](mailto:carin@warnerpr.com)



# want your brand to work harder?

Discover what we can do for you.



MONDERER DESIGN

[www.monderer.com](http://www.monderer.com)  
617.661.6125

IDENTITY | BRANDING | ADVERTISING  
EXHIBIT | TRADESHOW | WEB

# DANGERS AND DEMANDS OF DIGITAL DATA

## TRACK 2:

2:30 PM - 3:30 PM SALONS FGH

Financial data, marketing data, personnel data, customer data... Not only is data everywhere, but the opportunities (and pressures) to gather even more data have never been greater. Yet the demands of all this data, including how best to collect, maintain, analyze and interpret, continue to beset even the most seasoned professional. Adding to this list of challenges is the danger of company data being compromised and related privacy concerns. We'll review how to regain control, including strategies to optimize the collection of information, as well as processes to protect and secure on-line data.



**CYNTHIA IZZO**

Managing Director, KPMG

Cyndi Izzo is a principal in the IT Advisory Practice at KPMG, Cyndi inhabits dual professional roles. As KPMG's Information Protection and Business Resiliency practice leader in Boston, Cyndi specializes in providing information security/ privatization services to leading global financial institutions, retailers, and institutions of higher education. As KPMG's New England/ Upstate New York diversity co-leader, Cyndi spearheads the firm's regional efforts in building a comprehensive diversity program, collaborating and strengthening relationships with affinity groups, and growing and substantiating KPMG's seven internal diversity networks. Cyndi also serves as a sponsor and mentor, and as a volunteer recruiter at KPMG.

Cyndi joined KPMG in 2004, was promoted to managing director in 2011 and elected as a principal of the firm in 2013. She is a frequent speaker and panelist, most recently presenting to the Bentley College freshman class, at the Boston Business Journal's inaugural (BBJ) Biz Series, Meet your Mentor Monday Event and will be presenting on May 21st at the Women of ALPFA (Association of Professional in Finance and Accounting) Latina Summit where Cyndi will be a panelist on Authentic Leadership. Cyndi is a recipient of the BBJ's 40 under 40 Award, and has been recognized by El Planeta, Color Magazine, and ALPFA for her professional accomplishments and community service. In 2007, she was a national winner of KPMG's Chairman's Award of Excellence for Volunteer Services.



**LANG LEONARD**

CFO, LevelUp

Lang Leonard is a high tech industry veteran with 20 years of experience leading financial operations for rapidly growing public and private technology companies. Lang is currently the CFO for Mobile Payments industry leader LevelUp. Prior to LevelUp, Lang was the CFO of Affinova where he helped grow the company 10X prior to its sale to Nielsen. Lang also served as CFO for privately held software maker Ipswitch and Corporate Controller for publically traded RSA Security prior to its sale to EMC. Earlier in his career, Lang held management level positions with Solectron Corporation and PricewaterhouseCoopers. Lang has a BA Cum Laude in Economics from Colgate, an MBA with Honors from Boston University School of Management and a J.D. from Boston University School of Law.



**CARMEN ORTIZ**

US Attorney, District of Massachusetts

Carmen M. Ortiz has dedicated much of her professional career to public service. Nominated by President Barack Obama as the United States Attorney for the District of Massachusetts, Ms. Ortiz was confirmed by the U.S. Senate in 2009. She is the first Hispanic and the first woman to represent Massachusetts as United States Attorney.

As the chief federal law enforcement officer in Massachusetts, Ms. Ortiz supervises the prosecution of all federal crimes and the litigation of all civil matters, in which the federal government has an interest. Currently, Ms. Ortiz is the Co-Chair of the Attorney General's Healthcare Fraud Working Group and served from 2012 until January 2014 on Attorney General Eric Holder's Advisory Committee.

Ms. Ortiz has received numerous awards for her commitment to public service including, Latina Lawyer of the Year in 2014 from the Hispanic National Bar Association, Latina of the Year in 2012 from El Mundo Newspaper, and Bostonian of the Year in 2012 from the Boston Globe.

She earned her law degree from George Washington University Law School and her undergraduate degree from Adelphi University in New York.



**JOHN PRANCKEVICIUS**

Administration and Finance  
Director & Secretary-Treasurer,  
Massachusetts Port Authority

John P. Prankevicius, Director of Administration and Finance and Secretary-Treasurer, joined the Authority in May 2007. He oversees the Authority's financial responsibilities including treasury, budgeting, accounting, debt and investment management, risk management, and administration of the Authority, and serves as Treasurer-Custodian of the Massachusetts Port Authority Employees' Retirement System. Prior to joining the Authority, John served in various financial roles for the City of Worcester, Massachusetts for nearly fifteen years, his last three years with the City as Chief Financial Officer. John is a licensed Certified Public Accountant in the Commonwealth, and holds a BA. Degree and a Masters in Public Administration from the University of Maine and a Masters Degree in Accountancy from Bentley University.

**MODERATOR**



**GERARD T. LEONE**

Partner, Nixon Peabody

Gerry Leone is a tested and proven leader, problem solver and trial attorney. Utilizing his insight, experience and collaborative track record at the highest levels of county, state and federal government agencies, he represents individuals and organizations facing complex civil and criminal matters. Relying upon strong and longstanding relationships developed as Middlesex County (Mass.) District Attorney, First Assistant U.S. Attorney for the District of Massachusetts and Criminal Bureau Chief for the Massachusetts Attorney General's Office, Gerry provides valuable guidance and strategic advice and counsel to assist clients in managing risk, making difficult decisions and solving complicated problems.

# ON MISSION VERSUS MARKETS

## AFTERNOON KEYNOTE:

4:00 PM - 5:00 PM GRAND BALLROOM



**NICHOLAS NEGROPONTE**

Co-Founder, MIT Media Lab

Nicholas Negroponte is the co-founder (with Jerome B. Wiesner) of the MIT Media Lab (1985), which he directed for its first 20 years. A graduate of MIT, Negroponte was a pioneer in the field of computer-aided design and has been a member of the MIT faculty since 1966. He gave the first TED talk in 1984, as well as 13 since. He is author of the 1995 best seller, *Being Digital*, which has been translated into more than 40 languages. In 2005 he founded the non-profit One Laptop per Child, which deployed \$1 billion of laptops for primary education in the developing world. In the private sector, Negroponte served on the board of directors of Motorola (for 15 years) and was general partner in a venture capital firm specializing in digital technologies for information and entertainment. He has personally provided start-up funds for more than 40 companies, including Zagats and Wired magazine.

## MIT SLOAN BOSTON ALUMNI ASSOCIATION

would like to thank the following partners  
for their support of this conference:

## BWF Boston Women in Finance



ROUNDTABLE



SAVE THE DATE

# 13TH ANNUAL MIT SLOAN CFO SUMMIT NOVEMBER 19TH, 2015

visit [www.mitcfo.com](http://www.mitcfo.com) for details



MIT Sloan  
CFO Summit

Boston Alumni Association

# THE 2015 MIT SLOAN CIO SYMPOSIUM

**MAY 20, 2015**

**12<sup>TH</sup> ANNUAL MIT  
CIO SYMPOSIUM**

**MIT KRESGE AUDITORIUM**

In one day... Engage and connect with global IT leaders. Explore the newest enterprise technological innovations. Acquire actionable insight through leading academic research. Become a part of the exclusive MIT Sloan CIO Community to empower your professional future: 50+ Speakers, 700+ IT executives, business leaders and members of academia. This is where the future of IT happens.

The 2015 MIT Sloan CIO Symposium, the 12th in its series, is the premier international conference for chief information officers to look beyond the day-to-day issues to focus on a spectrum of solutions that are either already here or just over the horizon — ranging from Big Data, Digital Transformation, Enterprise 3.0 and Internet of Things to the new CIO roles outside of traditional corporate IT.

**MIT SLOAN BOSTON ALUMNI ASSOCIATION**

139A Charles Street  
Boston, MA 02114

**FOR MORE INFORMATION**

Visit [www.mitcio.com](http://www.mitcio.com) or contact Lindsey Anderson via email: [LANDERSON@MITCIO.COM](mailto:LANDERSON@MITCIO.COM)