



**Big Idea**  
**CONNECTpreneur**

**SUMMER FORUM**

June 4, 2015  
Tysons Corner Marriott



Join the conversation on Twitter @connectpreneur and #connectpreneur

# Big Idea CONNECTpreneur Summer Forum



## AGENDA

07:00 – 08:15 am	<b>REGISTRATION / NETWORKING</b>																											
08:15 – 08:20 am	<b>WELCOME</b> <b>S. TIEN WONG</b> , CEO of Tech 2000 and appnetic																											
08:25 – 09:15 am	<b>FIRESIDE CHAT</b> <b>TIMOTHY CHI</b> , CEO, WeddingWire and Co-Founder, Blackboard																											
<b>COMPANY SHOWCASE</b>																												
9:15 – 10:15 am	<table border="1"> <thead> <tr> <th>COMPANY</th> <th>PRESENTER</th> <th>TITLE</th> </tr> </thead> <tbody> <tr> <td>CirrusWorks</td> <td>David Giannini</td> <td>Executive Chairman</td> </tr> <tr> <td>DASHUB</td> <td>David Sandler</td> <td>Principal &amp; Strategic Advisor</td> </tr> <tr> <td>Agora</td> <td>Jason Ganz</td> <td>CEO</td> </tr> <tr> <td>Delight Me</td> <td>Marie-Louise Murville</td> <td>CEO</td> </tr> <tr> <td>Rosetta Health</td> <td>Buff Colchagoff</td> <td>CEO</td> </tr> <tr> <td>Helix</td> <td>Tom DeWitt</td> <td>President &amp; CEO</td> </tr> <tr> <td>Valaurum</td> <td>Adam Trexler</td> <td>President</td> </tr> <tr> <td>SwitchPitch</td> <td>Michael Goldstein</td> <td>Founder</td> </tr> </tbody> </table>	COMPANY	PRESENTER	TITLE	CirrusWorks	David Giannini	Executive Chairman	DASHUB	David Sandler	Principal & Strategic Advisor	Agora	Jason Ganz	CEO	Delight Me	Marie-Louise Murville	CEO	Rosetta Health	Buff Colchagoff	CEO	Helix	Tom DeWitt	President & CEO	Valaurum	Adam Trexler	President	SwitchPitch	Michael Goldstein	Founder
	COMPANY	PRESENTER	TITLE																									
	CirrusWorks	David Giannini	Executive Chairman																									
	DASHUB	David Sandler	Principal & Strategic Advisor																									
	Agora	Jason Ganz	CEO																									
	Delight Me	Marie-Louise Murville	CEO																									
	Rosetta Health	Buff Colchagoff	CEO																									
	Helix	Tom DeWitt	President & CEO																									
Valaurum	Adam Trexler	President																										
SwitchPitch	Michael Goldstein	Founder																										
10:15 – 11:00 am	<p><b>ALL STAR INVESTOR PANEL: WHAT'S REALLY HAPPENING IN EARLY STAGE FINANCING</b></p> <p>Introductions: <b>ELANA FINE</b>, Managing Director, The Dingman Center for Entrepreneurship, Robert H. Smith School of Business, University of Maryland</p> <p>Moderator: <b>JOE BURKHART</b>, Managing Director, Saratoga Investment Corp.</p> <p>Panelists:</p> <p><b>LESLIE JUMP</b>, Founder and CEO, Startup Angels</p> <p><b>JOHN MAY</b>, Founder, New Vantage Group, Co-author, Every Business Needs an Angel</p> <p><b>HANK TORBERT</b>, Principal, RLMcCall Capital</p> <p><b>SEVER TOTIA</b>, Partner, Edison Ventures</p>																											
11:00 am	<b>NETWORKING</b>																											

Next CONNECTpreneur Fora: September 17 and December 10, 2015

# Big Idea CONNECTpreneur Summer Forum



## SPEAKERS



### **TIMOTHY CHI, CEO, WEDDINGWIRE AND CO-FOUNDER, BLACKBOARD**

Timothy founded WeddingWire after planning his wedding. As a groom, he experienced first hand how difficult it was to execute on the wedding plans. As a technologist, he couldn't find an online resource that would help him plan more efficiently. Together with his cofounders, Jeff, Lee, and Sonny, they threw 4 desks into his empty living room in Chevy Chase, Maryland and WeddingWire was born. They set out to utilize their collective experience in technology to build a technology company that would revolutionize the wedding and event industry.

Previously, Timothy co-founded Blackboard Inc in 1998. While at Blackboard, Timothy pioneered many of Blackboard's product and strategic initiatives, helping the company grow to over 600 employees and a valuation of over \$750 Million.

Timothy holds a B.S. degree in Operations Research/Industrial Engineering from Cornell University and a Master's of Science degree in Engineering Management from Tufts University. Tim is a member of the Young Professionals Organization in Washington, D.C.



### **S. TIEN WONG, CEO, TECH 2000 AND APPNETIC, AND CHAIRMAN, LORE SYSTEMS**

Tien is CEO of Tech 2000, Inc. a Northern Virginia based leading provider of technology training, mobile e-learning, and mobile content management platforms. He is also Chairman of Lore Systems, a provider of IT support, network engineering and cloud computing services.

In 1991, Tien co-founded and served as CEO of CyberRep, Inc. until its acquisition in 2003 by Affiliated Computer Services. CyberRep was one of the largest privately held CRM outsourcing companies in the world with over 2,300 employees and \$80 million in revenue. Today, the CyberRep/ACS business unit is one of the world's largest call center operations, with over \$2 billion in revenue as a division of Xerox Corp. CyberRep was ranked in INC. magazine's "Inc. 500" as are of the fastest growing private companies in the USA. CyberRep was profitable for 11 consecutive years and was backed by Allied Capital Corporation, a \$5 billion investment company.

Tien is a recognized international expert in CRM, direct marketing, and BPO, having presented at dozens of industry events around the world, and written numerous articles on the CRM and BPO spaces. He has provided industry commentary on the ABC, Fox, NBC, CNBC, Maryland Public Television, and China's CCTV networks, as well as Time Magazine, The Washington Post, Inc. Magazine, and Success Magazine. He serves on several boards including the CIT GAP Fund's Investment Advisory Board, the Digital DC Tech Fund Investment Advisory Board, the Potomac Officer's Club and FounderCorps. He was appointed by Governor Martin O'Mally to the 9-member Maryland Venture Fund Authority which allocates and manages \$84 million of capital which is invested into top tier venture funds. He is an Entrepreneur in Residence at Georgetown University's McDonough School of Business, and a graduate of Dartmouth College.

# Big Idea CONNECTpreneur Summer Forum



## SPEAKERS



### **JOE BURKHART, MANAGING DIRECTOR, SARATOGA INVESTMENT CORP**

Joe Burkhart is a Managing Director at Saratoga Investment Corp, a New York City-based private equity firm and specialty finance company. He leads new business origination efforts and manages the firm's investment operations.

Prior to joining Saratoga, Mr. Burkhart was the Managing Director of Tatum's private equity practice. Previously, he was the Director of Business Development for American Capital's Private Equity Group where he led the group's deal origination, screening and staffing. Prior to joining American Capital, Mr. Burkhart was Managing Director at EJV Capital where he worked with the firm's principals in the development and investment management of structured finance and private equity focused strategies. Mr. Burkhart began his career at Allied Capital Corporation where he was a Vice President in the Private Finance group.

Mr. Burkhart has a bachelor's degree in business administration from the University of Notre Dame and an MBA from the Darden Graduate School of Business Administration at the University of Virginia.



### **LESLIE JUMP, FOUNDER AND CEO, STARTUP ANGELS**

Leslie has over twenty-five years experience building, advising and investing in new companies, products and brands, in the US and across the globe. She is the Founder and CEO of Startup Angels, a platform to inspire and enable new angel investors around the world. Prior to that, she was a Partner in Sawari Ventures, LLC, a Cairo-based early stage venture capital firm investing in entrepreneurs across the Middle East/North Africa. She continues as an advisor to Flat6Labs, Sawari Ventures' dedicated startup accelerator for seed stage investments. She serves on the Board of UP Global, a network of entrepreneurs and startup community leaders. She is an alumna of St. Johns College (Annapolis, MD/Santa Fe, NM), and serves on its Board of Visitors and Governors. (<http://www.linkedin.com/in/lesliejump>)



### **JOHN MAY, FOUNDER, NEW VANTAGE GROUP; CO-AUTHOR, EVERY BUSINESS NEEDS AN ANGEL**

John May is the managing partner of New Vantage Group, a McLean, VA firm that innovatively mobilizes private equity into early-stage companies and provides advisory services to both funds and private investors. Mr. May has been at the forefront of the angel investor movement and his experience over the last 20 years ranges from venture capital fund management to overseas consulting.

In 1991, he co-founded the Investors' Circle, a national non-profit group of 150 family and institutional investors working to grow the social venture capital industry. In 1996, he co-founded and became executive director of the Private Investors Network, an angel network sponsored by

# Big Idea CONNECTpreneur Summer Forum



## SPEAKERS

the Mid-Atlantic Venture Association. In 1999 he co-founded The Dinner Club, an investment group of 60 regional angels who collectively invested in early-stage ventures, followed by the eMedia Club and in 2000, the Washington Dinner Club. In 2003, he created Active Angel Investors, a fund with 60 active angels that was merged into New Dominion Angels in 2012. He was managing general partner of Calvert Social Venture Partners LP, the Mid-Atlantic Fund of Funds LP, and director and general partner in Seraphim Capital, a 30 million £ venture fund based in London.

He is chair-emeritus of the Angel Capital Association and is co-chair of the World Business Angels Association. He is the co-author of two books, Every Business Needs an Angel and State of the Art: An Executive Briefing on Cutting-Edge Practices in American Angel Investing. In the fall of 2002, the Batten Institute at the University of Virginia's Darden Graduate School of Business appointed Mr. May a "Batten Fellow". He received a BA from Earlham College and a MPA from Syracuse University's Maxwell School.



### **HANK TORBERT, PRINCIPAL, RLMCCALL CAPITAL**

Mr. Torbert is a Principal and Co-Founder at RLMcCall Capital Partners, a private equity firm focused on industrial, media, technology and special situations transactions. Mr. Torbert has spent the last 20 years in the venture capital, private equity, operational management, business development and corporate finance world.

As a founding investor and board member, Mr. Torbert played an integral role in the launch, development and \$100MM IPO of Mood Media (TSX: "MM"), an internet-based music services company. He also played a vital role in the formation and growth of Midas Medici (OTB: "MMED"), and orchestrated the acquisition of Direct Air and Swift Air, serving as Chairman of Swift Air, a passenger and cargo charter airline that was spun out of Swift Transportation.

Mr. Torbert was COO of Broadcast Capital, focused on media and broadcasting investments. Previously, Mr. Torbert was VP of the Financial Sponsor Group at JPMorgan Chase, where he covered top tier middle market private equity clients and completed over \$100 billion in transactions in media and telecom. He was previously at AIG, where raised capital for the firm's \$1 billion Global Emerging Markets Fund.

Mr. Torbert is an Entrepreneur-in-Residence at Georgetown's McDonough School of Business and the New Orleans'-based IdeaVillage's IDEAx and CAPITALx programs. He is a recipient of the Network Journal's Top 40 Under 40 Award, and serves on the boards of Cultural DC and the New Orleans' Contemporary Arts Center. Mr. Torbert holds a B.A., a master degree in International Finance and an MBA, all from Columbia University. Mr. Torbert is also an alumnus and Trustee of the Taft School. He enjoys collecting mid-century and contemporary art, hunting and fishing.

# Big Idea CONNECTpreneur Summer Forum



## SPEAKERS



### **SEVER TOTIA, PARTNER, EDISON VENTURES**

Sever is responsible for leading Edison investments in companies primarily located in the mid-Atlantic area. Sever co-leads investment strategy in Enterprise 2.0 segments including mobility, systems management, information services and on-demand applications. He also focuses on Education technology and services investments in K-12, higher education, and corporate sectors.

Sever is active in the Mid-Atlantic venture community as Chairman of NVTC's Capital Formation Committee. He also serves as a leader on committees for Mid-Atlantic Venture Association (MAVA), Deloitte & Touche Technology Venture Center (TVC), Maryland Incubator and National Sciences Foundation Tech Program.

**Introduction**

CirrusWorks, Inc. is a technology product company delivering next generation solutions for automated bandwidth management. The Company’s primary product is The Governor, a network appliance that provides real-time, dynamic traffic shaping, congestion control and Internet bandwidth optimization.

**CirrusWorks solves a chronic, growing problem across multiple industries: network congestion.** The bandwidth demands of cloud-based applications, content streaming, and constant connectivity create pressure on networks and result in low-quality user experiences. The traditional solution for network congestion is adding more bandwidth – which is not only expensive, but also insufficient as data congestion is a function of data demand, which tends to be highly concentrated in certain time windows, and growing exponentially.

**CirrusWorks delivers a game changing technology to solve this problem.** The Governor is a network appliance that easily fits into any network configuration, often with zero configuration. It uses dynamic algorithms instead of static and complicated rule sets to optimize bandwidth utilization. Since the Governor automates the bandwidth optimization process, there is no need for training or dedicated IT staff to manage it.

**Other technical approaches to this problem have been sub-optimal.** Traditional traffic-shaping solutions utilize static policies to select packets, prioritize applications, or limit protocols. The Governor technology utilizes mathematical formulae to determine the most efficient allocation of bandwidth resources in real time among users.

Cirrus works is led by a team of industry veterans who have founded and successfully exited multiple technology startups. The Company was established in 2012 and is headquartered in Falls Church, VA.

*CirrusWorks has perfected their core technical offering and has demonstrated a clear product-market fit across multiple verticals. The Company is now seeking to raise its Series A round to fuel growth.*

**Technology and Market Opportunity**

**Radically different approach to bandwidth congestion.** Rather than try and discern deep secrets from the user payload data with deep packet inspection, CirrusWorks arbitrates Internet congestion as it occurs by making the best decisions possible based purely upon the available bandwidth and the activities and instantaneous data demands of the users. CirrusWorks dynamically reprioritizes traffic without the technical difficulties associated with establishing, maintaining, and tuning programmatic rule sets.

**Vast market opportunity.** The Governor is a simple, effective solution to congested Internet traffic in businesses, schools, hospitals, public venues and potentially households. The market size for bandwidth and network optimization solutions is currently estimated at \$5 billion plus. The Company has focused its R & D, pilots and early sales on the Education, Hospitality, Travel Centers and Public Sector verticals, with strong customer testimonials and market validation.

Unit Economics:	\$	%	of Revenue
Average Sales Price	\$	4,240	100%
COGS		525	12%
Warranty		212	5%
Gross Margin		3,503	83%
Commission		848	20%
Net Margin		2,655	63%

**Investment Highlights:**

- **Innovative solution to core problem:** Dynamic bandwidth management solves growing network congestion issue for mission-critical applications.
- **Game Changing Technology:** Operates at link layer. No DPI. Works for any payload including encrypted sessions.
- **Proven Team:** Founded and exited multiple successful companies together
- **Market Validation:** Product-market fit is clear from customers across multiple verticals.

The profit model is based on gross margin produced through unit sales (after COGS) and licensing fees through reseller distribution channels. Revenue per unit, net of reseller discounts, consists of an average sales price of \$3,240 related to hardware and \$1,000 for software licensing fees. Cost per unit consist of 12% costs of goods, 5% warranty expense and 20% internal commission costs, resulting in a gross and net margin of 83% and 63%, respectively.



## DASHUB, LLC EXECUTIVE SUMMARY

We are car enthusiasts that thought it was ridiculous that we didn't have access to dealer auctions. So we started Dashub, a technology platform that scours the world's auctions to deliver clean and salvage vehicles to consumers with a concierge service.

### THE VISION

The salvage auto industry is a \$75-Billion growing, fragmented and inefficient industry that creates a poor consumer experience. The industry is currently pioneering lower cost salvaged autos from a new breed of technology and a data driven ecosystem, which Dashub has been able to tap into, creating a more efficient and transparent marketplace.

With a one year track record, Dashub is turning the traditional salvage car business into a modern web and mobile global marketplace. We've currently accessed the domestic market, Africa and Central America, where we plan to capture a larger percent of the available market share over the next 24 months.

### THE OPPORTUNITY

Currently, \$75 Billion in global sales were generated in 2014. This is consistent with the previous 10 years. An average of 13 million vehicles are entered into auction each year where an average of 8 million vehicles are sold.

### PRODUCT

Phase 1 of Dashub.com allows consumers to search and bid on over 150,000 salvage and used vehicles, with free registration. The site includes detailed photos and vehicle specifications for customers. Dashub collects automated deposits from customers of \$500 or 10% of the potential bid price and charges \$500 broker fee for all won vehicles.

### 4 MONTH RESULTS

- \$750,000 in Sales
- 100 Cars Sold
- Sold in 10 Countries
- 10.3K Registered Users

### STRATEGIC GOALS

- *Strategy:* Be the market leader by aggregating large volumes of sales in the used/salvaged car industry.
- *Tactics:* Offer a better user experience to deliver the right vehicles to the right customers through personalization.
- *Strategy:* Create a marketplace for Dashub to be the brand of choice, directly with consumers and dealers.
- *Tactics:* Deploy a multi-level global marketing campaign that spurs growth and sales.
- *Strategy:* Asynchronous communication across consumer platforms and touch points.
- *Tactics:* A/B test email designs and communications; Create/expand our social presence; Optimize our mobile experience; Expanding our PPC advertising globally.

### MANAGEMENT

Dashub was founded by Max Kane, Matthew Weitzman and Michael Lederman. Mr. Kane and Mr. Lederman were founding members of various financial ventures with over 20 years experience in the banking industry. Mr. Weitzman is a digital entrepreneur who helped launch over six dozen small business websites and architected web infrastructures for Fortune 500 companies. Board members consist of Mateen Aini, Matt Daniszewski and David Sandler. Mr. Aini, CEO of Plyfe, was named on Forbes list of promising CEO's top 30 under 30. Mr. Sandler is a marketing and business strategist with 10+ years experience currently leading Strategic Brand Marketing at Google. Mr. Daniszewski is Dashub's lead developer, who has been a senior developer and architect at Apple for the past 6 years.

### COMPETITIVE ADVANTAGE

- Market leader in the selection of inventory with over 150,000 daily vehicles for consumers.
- A one-stop shop that personalizes the consumers user experience.
- The platform is both domestic and international and will be the only true marketplace, which enables consumers to buy and sell vehicles online, shipped anywhere in the world.
- Leveraging consumer touch points to build a global community to educate and engage its customers.
- Word class management and advisor team.

**Profile:**

URL: <http://dashub.com>  
Industry: Auto / Tech  
Employees: 9  
Founded: Feb. 2014

**Contact:**

Matt Weitzman  
E: [mw@dashub.com](mailto:mw@dashub.com)  
O: (516) 882-7173

**Address:**

171C Milbar Blvd  
Farmingdale, NY 11735

**Financial Information:**

Company Stage: Start-Up  
Capital Seeking: \$3M

**Management:**

Max Kane  
Matthew Weitzman  
Michael Lederman

**Advisors:**

David Sandler, Google  
Mateen Aini, Plyfe  
Matt Daniszewski, Apple





## One Line Pitch

Agora is a highly disruptive evolution of the webinar allowing users to host dynamic and visually stunning presentations and meetings in virtual reality.

## Customer Problem

In B2B marketing, connecting with customers directly and sharing information is a critical component for making a sale. There is nothing more impactful in B2B marketing than in-person events and presentations, but they aren't scalable to reach a massive global audience. In today's world, if it doesn't scale, it doesn't matter. Webinars, the current digital solution, provide a scalable alternative but they lack the vivid realism, dynamic interaction, and networking opportunities of in-person events.

## Business Summary

The Agora platform allows users to host and attend "SIMinars," unique and engaging presentations that take place entirely within a simulated virtual reality environment. These SIMinars take advantage of the immersive nature of virtual reality to create a captivating experience and deliver unparalleled social interaction. SIMinars allow users from around the world to experience a presentation together in virtual reality as if they were truly there.

## Management

Our team is obsessed with virtual reality and has been pivotal in the growth of the DC virtual reality scene. We co-founded the DC virtual reality meetup group and grew it to over 300 developers and enthusiasts by hosting presentations from hot VR companies.

### Jason Ganz, CEO

- Marketing analytics expert at high growth SaaS startup.
- Grew online futurology community to 2+ million users.

### Collin Korandovich, Co-Founder

- Created the Agora seminar application
- Five years IT manager at KOREnergy

## Product/Services

The SIMinar is a virtual reality presentation that replicates the feeling of in-person seminars and events. After downloading the Agora client, users put on a virtual reality head mounted display (HMD) and find themselves in the Agora Amphitheater surrounded by digital representations of fellow attendees. A presenter on stage (also connected to Agora using an HMD) then speaks to the audience in real time aided by visual cues and effects ranging from a slide deck to 3D animations. SIMinars combine the best features of webinars with the stunning realism of virtual reality to captivate and engage users.

## Target Market

The last decade has proven that content marketing dominates B2B sales with over 68% of all companies using webinars for lead generation. But with so many companies creating content, it's next to impossible to get your content to stand out. We're targeting the innovators among marketers at large B2B content marketing companies and digital agencies that want to be on the cutting edge of new marketing trends. Marketers are always on the lookout for the next big marketing channel. By targeting the companies that create viral content for large brands, we can gain a foothold in many companies at once, and then grow our business through organic adoption of the medium.

## Business Model

Early revenue will come from large brands paying between \$100,000 - \$300,000 to use the Agora SIMinar client to create one-of-a-kind B2B marketing experiences. As virtual reality becomes mass market we will transition to SaaS pricing of \$100 - \$500 per presenter/per month for access to our platform so companies and users can create their own SIMinars.

## Summary

### Company Profile

Url: <http://AgoraVR.com>  
Industry: Virtual Reality Communications  
Employees: 4  
Founded: August 2014  
Contact: Jason Ganz  
jason.g@agoravr.com  
Location: 1602 A St. NW  
Washington, DC 20002

### Company Stage

Alpha product completed

### Management

Jason Ganz, CEO  
Matthias McCoy-Thompson, Co-Founder  
Collin Korandovich, Co-Founder,  
Josh Mahan, Co-Founder

### Advisors

AU Incubator: Tommy White, Bill Bellows  
Advisory Board: Jerom Glenn, Executive  
Direction of the  
Millennium Project

Delight Me, Inc.  
3510 Edmunds St NW  
Washington, DC 20007  
[www.delightme.com](http://www.delightme.com)

Marie-Louise Murville, CEO  
Cell: 202-251-6760  
[murville@delightme.com](mailto:murville@delightme.com)



---

**Management:**

CEO, Marie-Louise Murville  
CTO, Mike Sullivan  
Marketing Consultant, Liz Sara  
Network Admin, Alex Tulchinsky

**Industry:** Cloud Computing

**Number of FTE's:** 5

**Bank:** Wells Fargo

**Law Firm:** Wilson Sonsini

**Funds Sought:** \$500K

**Prior Investment:** \$1.2M

**Current Investors:**

Team, angels, Tom Barry, Al  
Berkeley, Charlie Fink

**Current Customers:**

Local prof. svcs firms

**Use of Funds:**

Sales, Marketing, Prod Dev

**Business Description:** Delight Me® solves the multi-billion dollar problem of knowledge worker burnout, turnover and client attrition through its cloud-based goal management and coaching platform. Offered to professional services firms on a subscription basis, the platform addresses both business *and* personal goals through one engaging user interface. This makes it easy for knowledge workers to focus on behaviors and metrics that matter most while providing managers with the visibility and data they need to make better decisions. With real-time data on performance metrics available on demand, managers can be proactive with their team versus reactive. Employees incorporate their own personal mentors and coaches to provide feedback and motivation to further drive desired behaviors and achievement rates.

**Company Background:** Delight Me has completed beta testing of Version 1.0 with some initial paying clients. Current focus is signing key reseller partners and anchor customers. Delight Me is targeting small to medium size professional services firms that include management consulting, law, accounting, insurance, and financial services, content providers, PR, and real estate companies. The Company will acquire users through web marketing and resellers that serve the same vertical industries with complementary solutions.

---

**Management: Marie-Louise Murville, CEO & Founder** – Serial entrepreneur, operating executive, investor, and management consultant specializing in turning ideas into products and businesses: Delight Me and Noxilizer founder, VP Marketing and Business Development at Telezoo, Charles River Ventures, Arthur D. Little, Mechanical Engineering MIT, London Business School. **Mike Sullivan, CTO** – 25+ years designing, building, and operating internet applications and telecommunications networks for national and international customers. VeriSign, AT&T, Paxfire. Northwestern, GWU. **Liz Sara, Marketing Consultant**- 25 years of B2B business leadership in early stage tech companies, Dingman Center Board & Entrepreneur-in-Residence; Lexis/Nexis, UPI, AOL, founder-SpaceWorks. M.A.-UMD. **Alex Tulchinsky, Network Infrastructure and Security** – 25+ years network engineering, IT/enterprise services, integration services, and project management. Neustar, SunRocket, AOL. Temple Univ.

---

**Competition:** Enterprise project management and goal management applications like Chronus and Success Factors require extensive customization, training, and overhead. The labor intensive aspects of these large applications provide an opportunity for Delight Me's light and easy motivation solution. Social networks like LinkedIn lack the purpose of personal, professional, and client goals. Personal productivity apps are siloed and lack the ability to track and motivate multiple global teams. By securely and privately allowing users to manage personal and professional goals, Delight Me reduces burnout and turnover. With more continuity in project teams, clients achieve better outcomes.

---

**Technologies/Special Know How:** Delight Me's patent-pending Goal Management System and Platform is built with the Ruby on Rails framework and is deployed via Heroku and Amazon Web Services. Using the Agile methodology, Delight Me employs Jira, Git-hub, HTML5, CSS, and Postgres. Delight Me® is a registered trademark.

---

**Financial Projections (Pro Forma):** Delight Me plans to reach profitability in 2016 and generate revenues of over \$90 million in five years. The company is currently raising \$500K to ramp sales and marketing activities. Delight Me has two recurring revenue streams: 1) annual subscription; 2) enterprise, private label or on-premises license. Sponsorship and advertising may serve as future, add-on revenue source. Average account size: \$15,000/year. Subscriptions start at \$5/month/user.

---

**Market Feedback:** According to a Partner at Venable, one of the world's most prestigious law firms, "Delight Me is the perfect way to provide a simple structure for associates to organize, prioritize, and track their career milestones with the guidance and support of mentors and partners. Currently, associates are overwhelmed with urgent day-to-day client and partner demands. They don't allocate enough time to developing advanced legal and business development skills essential to being promoted to partner. With just a few clicks, in a few minutes each week, Delight Me makes it easy for associates to be more engaged and firms to be more profitable."



“The backbone of health information”

**Rosetta Health is a first of its kind: a SaaS platform that makes secure exchange of medical records *simple and universal***

**Buff Colchagoff – CEO**

[buff.colchagoff@nitorgroup.com](mailto:buff.colchagoff@nitorgroup.com), 202-345-0298

Founder of Nitor Group in 2007. Buff has consulted in health information systems for 15 years. Buff has led important efforts in health information exchange including building the VA’s Personal Health Record, and leading HHS’ health information exchange programs.

**Doug Hill - COO**

[doug.hill@nitorgroup.com](mailto:doug.hill@nitorgroup.com), 301-520-2116

Entrepreneurial, growth-minded executive proven in building successful business functions and catalyzing rapid revenue turnarounds within demanding corporate settings. Strategic brand advocate skilled in expanding reach and uncovering new revenue opportunities. Proven mentor and director of high-performance teams.

*We’ve been working together for the past 15 years in Health Information Technology – over this time we’ve been responsible for developing over \$70 million in health IT revenues.*

**Description**

The Rosetta Health SaaS Platform makes exchange of health information across vendor platforms and products simple and cost effective. The platform allows for easy configuration of complex information exchanges. Based on standards already in place, Rosetta Health can exchange clinical information with almost all US Electronic Health Record (EHR) vendors.

**Problem**

Health information systems historically have not interoperated. EHRs took a mostly proprietary approach, with data and APIs. Currently the vast majority of clinical information is exchanged via fax.

At the same time, the economics are shifting where clinical data exchange becomes a priority. Insurers want clinical data for analysis and cost management. Tele-health and innovative health applications need this information to provide new services.

Because there are over 1000 different EHR systems out there alone, coding to each health information system’s interface is not an option.

**Competitive Advantage**

Nitor Group’s Rosetta Health leverages a SaaS platform to provide secure information transport and translation services – reducing the development time, cost and maintenance of in-house infrastructure. Rosetta Health provides a veritable “swiss army knife” of health information exchange capabilities that require almost no time to implement. A recent client was able to implement the functionality required for HHS’s new EHR certifications in ½ a day. This ability to create, operate and scale health information exchange with little effort is a game changer to our customers.

**Market Opportunity**

The total Health Information Systems infrastructure market is \$1.7B industry in 2013 growing at CAGR of 9.6% and continues to grow at a fast pace due to the demand for more usable clinical information.

Nitor Group already has over 30 organizations implementing our technology, including EHRs, portal and mobile vendors, hospitals, long term and rehab facilities, government agencies and statewide health information exchanges. This initial phase will be followed but a much wider adoption as health information exchange becomes more and more ubiquitous.

Our target segments for phase 2 focuses on those clients that need clinical information but haven’t had wide scale access yet, like long term care facilities, patient portals, and mobile health applications. We will launch a marketing and sales campaign to capture 25% of this emerging set of markets.

**Business Model**

- Recurring monthly fees for access to production SaaS platform.
- Pricing is based on either bandwidth, number of providers, or size of organization.
- B2B sales channel, embedding RosettaHealth in vendors products/offerings
- Easily configured custom solutions for specific enterprise needs.
- Free access to “sandbox” area for integration and testing.
  - Over 70% close rate of sandbox users.

The free access to “sandbox” allows potential customers to touch and feel the API and discover how easy implementation can be. It convinces users in the service quality and viability of the platform.

**Why Invest now?**

Building on the current provider to provider exchange of medical records, phase 2 will enable broad market access to medical records, enabling huge growth in health information infrastructure. This starts now! We’re an experienced company with proven track record in building these types of solutions. We currently have a strong base of organizations using the product. We are looking to fund a marketing and sales campaign that allows us to capture market share in the next phase of this market.

**Other Investors**

Employee owned

**Revenue/EBITDA**

	FY15	FY16	FY17	FY18
Revenue	\$1,093,891	\$4,860,949	\$11,341,910	\$29,227,302
EBITDA	-\$240,577	\$996,497	\$5,545,232	\$15,019,270

**Investment Scope**

We are seeking \$2M in funding for sales, marketing and additional product development over the next 2 years. The additional funding will be used penetrate and establish a strong brand in health information market.

# SNVC Presents Helix

Businesses are quickly transformed by SNVC's Helix solution – an affordable, easy to use, collaborative solution that leverages Microsoft's SharePoint's stronghold on the market. Helix is SharePoint's "5-minute makeover" and gives **business professionals** more functional control without compromising network or business security.

## **The Business Challenge We Faced**

SharePoint's market penetration is significant: 80% of Fortune 500 companies own it, but they represent only a portion of the 125+ million licenses sold. However, user frustration is also significant. SharePoint is hard to learn, hard to use and expensive. Too much is invested in it for companies to get rid of it. Thus, the need for Helix - a better way to use SharePoint. **Helix is a low cost, collaboration management tool that re-captures the power of SharePoint.** SNVC focused on the top barriers to SharePoint adoption and created an easy to use application that eliminates the expensive training, provides transparency throughout the organization. Helix allows each employee to be engaged in organizational activities and enables them to create and manage their own SharePoint workspace, to include assigning team members and setting document permissions.

**An Overview of What We Have Built:** Helix is ready to go to market today. It can be delivered via the cloud using a SaaS model, or on premise integrating it into an existing network. Each has its own pricing model and set of advantages. Both deliver the same functionality and have proven to increase productivity, save valuable time, and foster employee engagement.

## **Competition**

The list of collaboration tools grows daily. Our assessment of the competition is that they fall into three key areas. (1) Many are focused on projects, not the enterprise – good for small teams, and typically low cost. (2) Others are specific to a niche, like proposal development or recruiting. (3) The rest are enterprise based applications – good for the organization, but still costly, with high involvement from IT administrators.

**Helix provides an enterprise-wide application at a low cost, with little to no investment in training and minimal IT involvement. It's an exceptional value, starting as low as \$5,000 for a one time perpetual license.**

## **Addressable Market and Return On Investment**

In the National Capital Region (NCR), there are over 5,000 small and medium size businesses. With the right mix of market visibility, online branding, free trials, etc. Helix could quickly reach this market and rapidly expand to a global one, leveraging the existing SharePoint footprint where Helix can unlock the potential of collaboration.

## **Use of Funds**

Funding will be used for sales and marketing. We are seeking help to accelerate our go-to-market strategy, develop the brand and position the product, develop client support tools, hire a sales team and create our pipeline. Our projections over 5 years are:

Year	Revenue	Expenses	EBITDA	EBITDA%
1	\$342,500	\$330,850	\$11,650	3%
2	\$1,142,500	\$621,800	\$520,700	46%
3	\$2,067,500	\$875,400	\$1,192,100	58%
4	\$3,175,255	\$1,137,326	\$2,037,930	64%
5	\$4,472,194	\$1,267,019	\$3,205,174	72%
<b>TOTAL</b>	<b>\$11,199,949</b>	<b>\$4,232,395</b>	<b>\$6,967,554</b>	<b>62%</b>

## About Helix

- Built on SharePoint
- Low cost, collaboration management tool; ideal for proposals, recruiting, onboarding, and more
- Includes task management tools
- Offered in the cloud or on premise
- Little to no training required
- Reduces amount of IT administration
- Proven performance—in use today

## About SNVC

- Established business with 17 year track record
- Debt-free since inception
- Top Secret Facility Security Clearance
- CAGE Code: 1F4Z6
- DUNS #: 041320164
- Winner Best Places to Work 2011, 2012 (top small business)
- Microsoft Silver Partner—Portals & Collaboration

## Financing Sought:\$2M-\$5M

Accounting Firm: Matthews, Carter and Boyce, P.C.

Purpose of Funds: Sales & Marketing

## Intellectual Property

Law Firm: Reed Smith

Code: Copyrighted

Logo: Trademarked

## Learn More

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

On Facebook: SNVC

On Twitter: @SNVC1

On LinkedIn: SNVC; Our Product Page is Helix





## EXECUTIVE SUMMARY

Valaurum, Inc. ([www.valaurum.com](http://www.valaurum.com)) aims to disrupt the markets for precious metal and commemoration by offering the smallest denomination of gold bullion on the world market. Valaurum's primary product is the Aurum®, a sandwich of 24k gold between layers of printed polyester. At a market price of \$1300 per troy ounce, each Aurum contains \$4.18 or \$2.09 of gold. Valaurum, Inc. has the exclusive, world-wide license to manufacture, market and distribute this product. The Aurum and Valaurum are registered trademarks, and the Aurum is protected by worldwide patents pending and numerous trade secrets, all of which inure to Valaurum through its license agreement.

Gold in the Aurum is easier to verify and harder to counterfeit than conventional gold coins and bars. The Aurum is durable and convenient to carry, since the gold is protected by a strong and transparent polyester film. The gold can also be assayed and recovered through standard industry methods. Also, the polyester film means the Aurum can be printed with unique messages in four-color, high-resolution print. The Aurum is a uniquely affordable way to own gold, making collecting and investing available to everyone.

Valaurum is positioned to address a crisis in the precious metals industry. The gold market (private investments and official holdings) is estimated to be worth \$2.4 trillion USD. The bullion market has focused on high net worth individuals and low margin transactions. With a 300% rise in the cost of gold, traditional gold bars and coins are now out of reach for most of the world's population. The Aurum's small, convenient increment commands a higher margin than conventional gold. For our dealers, the Aurum represents a genuinely new product, an expanded customer base, and industry-leading profit margins.

The Aurum has been sold to artists, banks, schools, non-profits, corporations and families to commemorate their most meaningful events. This promotional market is ripe for expansion. Central banks could also issue commemorative gold currency using Valaurum's technology. A network of dealers is eager to distribute the world's first currency in this form. Valaurum has sold two issues of commemorative Aurum to a national government, and promising discussions with several countries are underway.

Valaurum's sales grew 600% in 2014. Last year, the Aurum figured prominently in a national television campaign and tens of thousands of Aurum were sold in the United States. Canadian sales are rapidly expanding through one of the largest online bullion dealers and a network of local retailers. The Aurum has been successfully sold in the United States, Canada, Europe, and South America. The Company intends to continue to expand its bullion, commemorative, and governmental sales.

Through 2014, Valaurum upgraded every step of its production process. The Company also made significant investments in research and development, process management, quality control, and fulfillment. In January 2015, Valaurum acquired exclusive production rights from its licensor, clearing the way for further expansion. As a result of these efforts, Valaurum more than doubled production capacity while halving its costs. Management sees opportunities for further, significant production savings.

SwitchPitch is a  
business  
development  
marketplace  
connecting big  
companies with  
startup innovation



- SwitchPitch provides an online marketplace that allows big companies to post projects that address their needs and challenges and be matched with innovative startup solutions
- The SwitchPitch platform helps manage internal innovation initiatives, such as hackathons, from one easy interface
- SwitchPitch also hosts events that allow big companies to pitch their projects to the startup community



# Big Idea CONNECTpreneur Summer Forum



## SPONSORS



### TECH 2000, INC

Tech 2000 is an award-winning EdTech and mobile content management software company. We are seriously committed to pushing the limits of technology and innovation to improve the learning experience for learners and support those that are involved in education. Tech 2000 has developed and patented mobile virtual technologies and learning analytics technologies which have resulted in the creation of the Appnetic and Lumious platforms.



### GEORGE CHURCHWELL, CO-FOUNDER AND PRESIDENT

George is the President of Tech 2000, Inc., a leading education solutions and mobile content management software company. George is responsible for driving Tech 2000's product development, long-term strategy and vision. He is also the company's Chief Revenue Officer.

Tech 2000 is based in Herndon, Virginia. Our core strengths include content development, mobility, dynamic education tools, and training delivery for IT. Our proprietary adult learning methodology techniques are proven to provide the knowledge and cutting-edge technical capabilities required in today's telecom industry. In addition to winning awards such as the Silver Brandon Hall Excellence in Innovation Award, Tech 2000 also won the Sakigake Innovation Award at Cisco in 2009, 2010, 2011, 2012, and 2013, as well as the Cisco Innovation Learning Partner of the Year in 2014.

With almost 30 years experience in the networking industry, George has interacted with a wide variety of network communications technologies with real-world experience in systems integration, security, and web presence. His focus has been on improving training for the broadband service provider workforce, particularly through the use of dynamic e-learning and mobile techniques. George's specialties include, MEF- Carrier Ethernet Certified Profession (MEF-CECP), Cisco Certified Systems Instructor (CCSI) for Cisco's ARK9K, CRS3, and XRFund, products and technologies.



### LORE SYSTEMS, INC

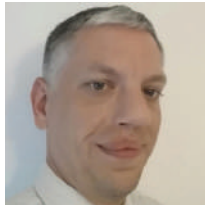
Lore Systems helps our clients with cutting-edge IT network engineering and managed services solutions. Lore architects, designs and delivers managed hosting and cloud computing systems, and outsourced IT network infrastructure, support and help desk solutions that easily accommodate our clients' unique requirements. At Lore, we strive to provide the very best customer experience in the industry by making IT "Easier, Friendlier, and More Reliable."



# Big Idea CONNECTpreneur Summer Forum



## SPONSORS



### **ANDREW ZALESKI, VICE PRESIDENT AND DIRECTOR OF INFORMATION TECHNOLOGY**

Andrew (Drew) Zaleski is Vice President and Director of Information Technology at Lore Systems, Inc. an IT professional services company which provides enterprise network engineering, virtualCIO, managed hosting, and cloud services. At Lore, Drew has oversight of the Company's engineering operations and sales engineering functions, and built the Company's vCIO (virtual Chief Information Officer) practice.

Drew has over 15+ years of experience in design, installation, configuration, administration and troubleshooting of LAN/WAN infrastructure and security, leveraging a multitude of technologies to produce solutions. He holds ITIL, Microsoft and other professional certifications.

Prior to joining Lore, he held a variety of operational, management and leadership positions including Solutions Architect Manager for Dispersive Solutions, Inc. and previously, Program Manager and Senior Network Engineer for Dataprise, Inc. He also worked as Director of Information Technology for Petroleum Marketing Group, Senior Consultant for Database and LAN Solutions, and Director of Operations and Information Technology for Christian Relief Services Charities.



### **APPNETIC**

appnetic is the world's first SaaS platform which allows non-programmers to 1) create native mobile apps in under 15 minutes, 2) load any kind of content, and 3) publish and distribute the content to an unlimited number of users.

appnetic's primary use is for sales enablement for organizations and enterprises which have large and frequently changing product portfolios and/or large field sales forces who need "just in time" sales and marketing information at their fingertips.

Bottom line: appnetic helps our customers "sell more." @appneticmobile



### **BILL SMITH, VICE PRESIDENT PRODUCT & GROWTH**

Bill is the Vice President, Product & Growth for appnetic, a SaaS mobile app for sales enablement, where he is responsible for product development, product engineering, quality assurance, training, account management, sales and marketing.

Prior to Appnetic, Bill was a partner in Exhilarator, a DC-based technology seed fund that invests in mobile and Internet startups. Bill is a practiced entrepreneur and operations executive with experience building companies from inception to over \$30m in revenue. Before holding founding, operational and management roles in multiple startups, Bill worked in business development and finance with global brands like The Walt Disney Company and

# Big Idea CONNECTpreneur Summer Forum



## SPONSORS

J.P. Morgan Chase. Bill received a Bachelor of Arts in History from the University of Virginia and a Masters of Business Administration from UCLA Anderson School of Management.



### WILSON SONSINI GOODRICH & ROSATI

Wilson Sonsini Goodrich & Rosati is the premier legal advisor to technology, life sciences, and other growth enterprises worldwide. We represent companies at every stage of development, from entrepreneurial start-ups to multibillion-dollar global corporations, as well as the venture firms, private equity firms, and investment banks that finance and advise them. The firm's broad range of services and practice areas are focused on addressing the principal challenges faced by the management, boards of directors, shareholders, and in-house counsel of our clients.



### MICHAEL LABRIOLA, PARTNER

Michael Labriola is a partner in the Washington, D.C., office of Wilson Sonsini Goodrich & Rosati, where he works with public and private technology companies through all stages of their growth. Michael also frequently represents investment banks, venture capital funds, and private equity firms in a broad range of investment transactions.

Michael's practice focuses on corporate and securities law, including general corporate representation, public offerings, venture capital financings, and mergers and acquisitions. He has assisted clients with matters ranging from formation and early-stage venture financing to listings of publicly traded securities on U.S. and foreign exchanges. He also has considerable experience in counseling publicly held companies on disclosure matters, SEC compliance, NASDAQ and NYSE listing matters, and other securities laws issues.

Prior to law school, Michael was a senior auditor with Arthur Andersen LLP's Chesapeake-region growth, services, and products assurance practice and later with Ernst & Young LLP's assurance and business advisory division. While at Arthur Andersen and Ernst & Young, Michael audited public, private, and not-for-profit entities in several sectors, including telecommunications and technology. Michael is a CPA in Virginia.



### BDO

For more than 100 years, BDO USA has been recognized as a premier accounting, tax, financial advisory and consulting organization. Providing services to a wide range of publicly traded and privately held companies, BDO offers a sophisticated array of services and global capabilities, combined with the personal attention of experienced and committed professionals. Founded on timeless values, motivated by entrepreneurial thinking, anchored by individual accountability and professionalism, and distinguished by quality and independent service, our distinct culture is the reason people who know, choose BDO.

# Big Idea CONNECTpreneur Summer Forum



## SPONSORS



### MARK ANDERSEN, PARTNER

Mark has over 15 years of experience in public accounting. Mark Andersen is a partner in BDO USA, LLP's (BDO) Assurance department with 19 years of public and corporate accounting experience. Mark focuses on working with venture-backed information technology companies, venture capital funds and government contractors.

Mark's clients range from early stage startups to well-established middle-market enterprises with domestic and international operations. His background in both public accounting and in private industry allows him to provide practical insight into his clients' accounting issues.



### MCGLADREY LLP

McGladrey is a leading provider of assurance, tax and consulting services focused on the middle market. We guide our clients through complex business challenges by understanding their needs and bringing together the right team to address them. With nearly 8,000 professionals and associates in 80 cities nationwide and access to more than 32,000 people in 110 countries through our membership in RSM International, we can meet your needs wherever in the world you do business.



### CHARLES G. CARR, CPA, AUDIT PARTNER

Chuck is the Assurance leader of the Washington Metro Offices, Technology and Life Sciences practice. This practice covers companies representing the technology services, software, SAAS, telecommunications, media, biotech, pharmaceutical, and medical device sectors. Many of these companies are backed by private equity and venture capital. Chuck has over 29 years of public accounting experience. Prior to joining McGladrey, he previously served as the Greater Washington Emerging Growth Company practice leader for Deloitte.

Chuck has a strong working knowledge of the many issues public and private companies face, including accounting, reporting, and corporate governance. As a result of his experience, Chuck is familiar with technological changes, venture capital equity/debt accounting issues, accounting for acquisitions, SEC preparation and reporting, IPO readiness, global expansion issues, as well as working with complex stock-based compensation and revenue recognition issues. Chuck has worked with multiple companies as they moved through their IPO process and has worked with many other companies through their successful sale to either financial or strategic buyers. Chuck is passionate about working with high growth companies while guiding them through their ever changing life cycle.



### RYAN & WETMORE, P.C.

Ryan & Wetmore We are a full-service accounting and management-consulting firm, servicing the Northeast/Mid-Atlantic region since 1988. What makes us different from other accounting firms

# Big Idea CONNECTpreneur Summer Forum



## SPONSORS

is our proactive approach. We work hard to earn our clients' confidence by encouraging open communication year round. This approach has enabled us to help clients become more efficient, more competitive, and therefore, more profitable. Through our numerous management engagements, we have become trusted, unbiased advisors. We do this by riding the fine line between keeping an objective perspective and being our clients' advocate.



### **PETER T. RYAN, CPA, CO-FOUNDER & PARTNER**

Pete co-founded Ryan & Wetmore in 1988, a 3 office, 35 person firm serving the Mid-Atlantic region. He currently works with clients to address tax, audit and accounting issues. He also has significant experience in international tax matters and business consulting services. His expertise extends to the following industries: Healthcare organizations, Construction and Real Estate, Government contractors, Technology groups, Manufacturing, and High Net Worth Individuals.

Pete has served on the Board of Directors for a number of successful for-profit and nonprofit organizations. He is an active member of the Healthcare Advisors Association, the Real Estate and Construction Association, the CPA Manufacturing Services Association, the Virginia Transportation Construction Alliance, and the Construction Financial Management Association.

Pete obtained a Master of Business Administration in Finance from the University of Baltimore and a Bachelor of Arts in Accounting from the Catholic University of America. He is a member of the American Institute of Certified Public Accountants, Maryland Association of Certified Public Accountants, Virginia Society of Certified Public Accountants, and the Greater Washington Society of Certified Public Accountants.



### **THE MELTZER GROUP**

The Meltzer Group is a diversified financial services company based in Bethesda, Maryland. Meltzer has become industry leaders in the insurance field as cited by the Washington Business Journal, providing comprehensive business, personal and corporate insurance and financial strategies. Founded in 1982, The Meltzer Group prides itself in providing clients exceptional service and innovative problem solving ideas. They believe that the clients' needs and desires are the most important factors in the insurance process.



### **RICHARD "RICH" DIPIPPA, PARTNER**

Rich is a native of Longmeadow, MA, and graduated from The George Washington University. He started in the insurance industry in 1985 with New York Life. He joined Mass Mutual and The Meltzer Group in 2008 as a partner. Rich primarily works with Business owners and executives on Succession and Estate Planning. Most of Rich's clients come from referrals by advisors (CPA, AH, CLIENTS, etc.). Rich is married to Molly and has one daughter, Carmen (13).

# Big Idea CONNECTpreneur Summer Forum



## SPONSORS



### **MONTGOMERY COUNTY DEPARTMENT OF ECONOMIC DEVELOPMENT**

The Montgomery County Department of Economic Development creates and administers programs that support and grow our diverse business community, expand the county's economic base and provide employment opportunities for residents. Through our Montgomery County Business Innovation Network, Agriculture Reserve, Small Business Mentorship and Small Business Empowerment programs, Workforce Services and Strategic Financing programs, we stand ready to assist businesses at all stages of growth. To learn more, contact the department at 240-777-2000, e-mail us at [ded.info@montgomerycountymd.gov](mailto:ded.info@montgomerycountymd.gov) or visit [www.ChooseMontgomeryMD.com](http://www.ChooseMontgomeryMD.com).



### **SALLY STERNBACH, ECONOMIC DEVELOPMENT DIRECTOR**

Sally currently serves as Acting Executive Director for the Montgomery County Department of Economic Development. She joined the department in 2012 as Deputy Director. Since that time, she has been instrumental in developing programs to support the local business community including the MOVE, the Life Sciences Impact Grant, the Business Innovation Network, and Cybersecurity programs.

Previously, Sally served as the Executive Director for Rockville Economic Development, Inc. During her tenure there, she launched the Rockville Women's Business Center, gained approval for a hotel for Rockville Town Center, participated in successful bids for Choice Hotels and MesoScale Diagnostics headquarters, initiated the Rockville Innovation Center which today houses 35 start-ups, and created a women's business plan competition with \$20,000 in annual cash prizes and an annual Postdoc Conference and Career Fair for 500 S.T.E.M. postdocs.

In her prior life, she spent 18 years with AT&T, taught accounting and finance, and ran a social services non-profit in NYC and a tourism development organization in West Virginia. Her proudest accomplishments, aside from her family, include national and international gold medals in rowing with the Potomac Boat Club and with Avalon.



### **FAIRFAX COUNTY ECONOMIC DEVELOPMENT AUTHORITY**

The award-winning Fairfax County Economic Development Authority promotes Fairfax County as a business and technology center. The FCEDA offers site location and business development assistance, and connections with county and state government agencies, to help companies locate and expand in Fairfax County. In addition to its headquarters in Tysons Corner, Fairfax County's largest business district, the FCEDA maintains marketing offices in seven important global business centers: Bangalore, Boston, Munich, London, Los Angeles, Seoul and Tel Aviv.

# Big Idea CONNECTpreneur Summer Forum



## SPONSORS



### **DR. GERALD GORDON, PRESIDENT & CEO**

Dr. Gerald L. Gordon, Ph.D., is the president and CEO of the Economic Development Authority in Fairfax County, Virginia, one of the largest office markets in the nation. He has been with the FCEDA since late 1983, during which time office space in the county grew from 32 million square feet to more than 115 million, and jobs in the county grew from 243,000 to about 600,000.

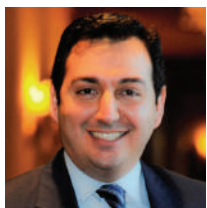
Dr. Gordon has also worked for Arlington County, Virginia, and the U.S. Department of Labor. He was instrumental in creating the Emerging Business Forum and bringing the 1998 World Congress on Information Technology to Fairfax County. In 2005, the FCEDA was named by Site Selection magazine as one of the Top Ten Economic Development organizations in North America.

Dr. Gordon holds a bachelor's degree from The Citadel, a master's degree from The George Washington University, and a doctorate in international economics from The Catholic University of America. He is the author of 13 books on strategic planning and economic development. His most recent books include "The Economic Viability of Micropolitan America" (CRC Press, 2013), "Reinventing Local and Regional Economies" (CRC Press, 2011) and "The Formula for Economic Growth on Main Street America" (CRC Press, 2009).



### **HAFEZICAPITAL INTERNATIONAL CONSULTING**

HafeziCapital International Consulting is an international financial and business consulting firm offering the following services: Growth Consulting (sales, margins, income, cashflow, valuation, leverageratios); Organization Consulting (structure, process, delivery, supply chain, restructuring); Capitalization Consulting - advising on matters of raising capital; International Consulting - entering new global markets (feasibility studies, country risk analysis, market entry strategy, joint venture development, acquisition analysis, supply chain audits, outsourced international market entry).



### **BABAK HAFEZI, MA, MBA, CEO**

Babak Hafezi is a seasoned entrepreneurial business expert in the areas of strategy, turnarounds, growth, capitalization and international market entry consulting. He has a demonstrated expertise in strategy development, reorganization and reengineering. His advice is actively sought by leading global CEO's, government officials and news agencies such as Investors Business Daily, Thomson Reuters, and Forbes. Morgan Stanley Private Wealth Management sought his advice on the Groupon Initial Public Offering.

International clients include Luxury Jeweler Cartier, LVMH (sub-contractors) and other Small and Medium Corporations, Angel Investors, Private Equity and Venture Capital firms.

Babak Hafezi obtained a Bachelor's degree in International Relations with a focus on Middle



# Big Idea CONNECTpreneur Summer Forum



## SPONSORS

Eastern Studies and a M.A. in International Peace & Conflict Resolution from the School of International Service at The American University in Washington D.C.. He subsequently obtained a Master's in Business Administration (MBA) from the Kogod School of Business at The American University. Babak Hafezi has volunteered at Network for Teaching Entrepreneurship (NFTE), and serves on numerous Board of Directors positions, and advisory boards among them his alma mater the School of International Studies's Young Alumni and Friends Committee at the American University.



### WHARTON CLUB OF DC

The Wharton Club of Washington, DC ([whartondc.com](http://whartondc.com)) supports the Greater Washington, DC business community and alumni success in our region through our rich calendar of events – a total of 150 to 200 or more each year - as well as liaison with the Wharton School, and other professional and alumni groups.

Join us in DC for two days April 26-27, 2016, for our 3rd Annual Innovation Summit: Meet fellow entrepreneurs, funders, mentors, leading Wharton, Penn, and other top professors – ready to engage you and raise your odds of hitting your target, or finally testing that new business idea. In workshops, startup veterans will guide you thru market-tested planning and execution steps, boosting your “success quotient” as you push your idea ahead. Then, as now, we'll connect innovators in many industries to new colleagues, plus many US and global resources. Learn more at <http://www.whartondc.com/>



### ALI QURESHI, VICE PRESIDENT

Ali Qureshi serves as Vice President of Consulting Services at Xcelerate Solutions. Ali brings nearly two decades of experience assisting Federal Government and commercial clients in meeting their technology services needs through innovative solutions. He is currently the Vice President for Programs and the Program Chair for the 2015 Wharton DC Innovation Summit.

Prior to joining Xcelerate, Ali had leadership experience in a number of healthcare technology start-up companies. He was Chief Technology Officer for RF Telematics, which delivers the MedLogiq data management platform for the healthcare market. Previously, Ali served as the Chief Operating Officer for MedRed LLC which develops medical records and clinical decision support systems.

Ali holds a Bachelor's Degree in Environmental Engineering from Wilkes University and an Executive Master's Degree from the Wharton School and School of Engineering and Applied Science at the University of Pennsylvania.



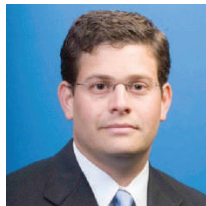
# Big Idea CONNECTpreneur Summer Forum



## SPONSORS



emissary realty



### **TODD A. SHERBACOW, CEO, EMISSARY REALTY, LLC**

Mr. Sherbacow founded Emissary Realty, LLC to provide service lines not currently available in commercial and residential markets. As your emissary, we are your trusted agents and cover all aspects of your real estate needs. We roll up our sleeves with our clients and interact with architects, contractors, and budgets. We help with furniture, data cabling and wiring and even telephones and IT.

Emissary Realty also handles retail and residential transactions offering all brokerages under one roof. Emissary Realty represents tenants. Mr. Sherbacow and the team have worked for publicly traded companies such as Trammell Crow Company and CBRE. They learned how to lease space for owners but the conflicts were obvious. This background is critical for knowing how landlords calculate the value of deals and what's most negotiable.

Mr. Sherbacow obtained a B.A., International Affairs from George Washington University. For nine years he has volunteered as a mentor for the Hoop Dreams Academic Scholarship Fund and is active in the lives of four students who were the first in their family to attend college. Mr. Sherbacow also serves on the Board and of the Jewish Historical Society of Greater Washington. He is married to Diana Sherbacow and have a wonderful son, Jack. Mr. Sherbacow is an avid golfer, skier, tennis player and cyclist.



### **THE DINGMAN CENTER FOR ENTREPRENEURSHIP, AT THE ROBERT H. SMITH SCHOOL OF BUSINESS, UNIVERSITY OF MARYLAND**

The Dingman Center for Entrepreneurship is a top-tier entrepreneurial institute recognized around the world as a leader in enterprise creation. The Dingman Center is continuously pushing the boundaries of teaching and learning with its focus on practical entrepreneurship, global innovation and international classroom experiences. The Center promotes opportunities that provide maximum resources to start-up businesses in terms of ideation, execution and financing; and that support its mission to take entrepreneurs "from the back of a napkin to the first \$1 million in financing."



### **ELANA FINE, MANAGING DIRECTOR**

Elana Fine is Managing Director of the Dingman Center. Elana's primary focus is leading the Dingman Center in support of its mission and strategic plan. Key responsibilities include oversight of our student venture incubator, Dingman Center Angels investor network, business competitions, and technology commercialization efforts. Elana also develops and maintains relationships with donors, board members, EIRs, the Smith School community and other campus and regional partners. She is also co-chair of the Dean's Task Force on Entrepreneurship and Innovation.

# Big Idea CONNECTpreneur Summer Forum



## SPONSORS

Prior to joining the Dingman team, Elana was an Associate and a Vice-President of Revolution Partners, an investment bank where she advised on a variety of technology transactions ranging between \$5 million and \$100 million, including venture investments for both early and late stage private companies, sell side and buy side acquisitions and fairness opinions. Elana also served as Revolution's CFO from 2003-2006. From 1997-2000, she was a consultant with Accenture, where she implemented technology solutions for clients in the financial services, government and natural resources industries.

Elana earned an MBA in Finance and Accounting from the University of Chicago's Booth School of Business in 2002, and earned a BS in Finance, magna cum laude, from the Smith School of Business at the University of Maryland, College Park, in 1997. Elana resides in Potomac, Maryland, with her husband and two children.

The logo for Hogan Lovells, featuring the text "Hogan Lovells" in a white serif font on a green rectangular background.

Hogan  
Lovells

### HOGAN LOVELLS

Hogan Lovells is a global legal practice that helps corporations, financial institutions, and governmental entities across the spectrum of their critical business and legal issues globally and locally. We have over 2,500 lawyers operating out of more than 40 offices in the United States, Europe, Latin America, the Middle East, and Asia. For more information, please visit: [www.hoganlovells.com](http://www.hoganlovells.com).



### RICH BECKER, PARTNER

Rich is a Partner in our corporate practice and the Administrative Partner of our Northern Virginia office. He focuses on private equity, mergers and acquisitions, and commercial transactions both in the United States and internationally. Rich represents corporations and private equity investors in a variety of commercial matters including public and private merger transactions, minority investments, joint ventures, tender offers, recapitalizations and debt financings.

Rich has been recognized by multiple publications. He has been a finalist for Washington Business Journal's Top Washington Lawyer for Corporate Mergers and Acquisitions. He is featured in Chambers USA in Band One in Virginia for Corporate/Mergers and Acquisitions and Washington, D.C. Super Lawyers has named him one of the Top 100 lawyers in the Washington, D.C. Metro area. Rich is also an Adjunct Professor of Corporate Acquisitions at George Mason University School of Law.



### GEORGETOWN ENTREPRENEURSHIP INITIATIVE

The Georgetown Entrepreneurship Initiative enables students to see the world as entrepreneurs do, while providing the knowledge and skills they need to act on their insights and add value to society.

# Big Idea CONNECTpreneur Summer Forum



## SPONSORS

Our mission is to create a culture of entrepreneurship throughout the Georgetown University community insuring that all members have the opportunity to explore and experience what it means to behave like an entrepreneur.

We INSPIRE students by encouraging entrepreneurial thinking, TEACH students about entrepreneurship through the experiences of accomplished entrepreneurs, CONNECT students to a community of entrepreneurs and innovators on and off campus, and encourage students to LAUNCH new ventures.



### **JEFF REID, FOUNDING DIRECTOR OF THE GEORGETOWN ENTREPRENEURSHIP INITIATIVE OF THE MCDONOUGH SCHOOL**

Jeff Reid is the Founding Director of the Georgetown Entrepreneurship Initiative. He has previously held leadership roles at the Network for Teaching Entrepreneurship, DigitalBridge Communications, DLA Piper, and the University of North Carolina at Chapel Hill.

In 2009, Reid launched the Georgetown Entrepreneurship Initiative to catalyze entrepreneurial thinking and activities across Georgetown University and make a broader impact in the Washington, DC entrepreneurial community. In 2012, Georgetown was recognized by the Global Consortium of Entrepreneurship Centers as a global leader in entrepreneurship education. Reid was also the founding director of the McDonough School of Business Real Estate Finance Initiative, where he helped raise over \$6 million in seed funding.

At UNC-Chapel Hill, Reid was the founding executive director of the Center for Entrepreneurship, which he grew to a No. 1 national ranking by Forbes and Princeton Review and was chosen by his peers and Entrepreneur magazine as one of the top five entrepreneurship center directors in the United States. Reid earned a B.S. in business administration from Appalachian State University and an MBA from the University of North Carolina at Chapel Hill.



### **SMARTCEO**

SmartCEO is the largest platform for regional events and content, serving an exclusive community of growth-minded CEOs and business leaders. Our mission is to educate and inspire visionary leaders at our high-energy entrepreneurial events and with access to valuable online, video and print resources. Currently operating in the Mid-Atlantic region with offices in Philadelphia, New York, Baltimore and Washington, DC.



### **HEATHER LOUISE FINCH, MARKET DIRECTOR**

Heather Louise Finch is the Market Director for SmartCEO in the Greater Washington, DC region, where she works with C-level executives to help them grow their companies

# Big Idea CONNECTpreneur Summer Forum



## SPONSORS

through involvement with the SmartCEO community. She is responsible for SmartCEO's overall business development and marketing activities in the DC market. She oversees the development of new clients and existing clients and manages those relationships by expanding, executing and leading multiple sales, marketing and special events across all industry verticals in the DC region.

Prior to joining SmartCEO, Heather Louise worked in Raleigh, NC at T.A. Cook, an international management consulting company for asset and operations management. Prior to T.A. Cook, she worked in the North Carolina Governor's Office of Bev Perdue.

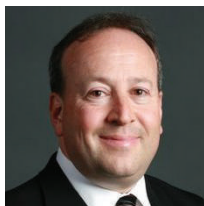
Heather Louise is a graduate of Peace College, where she received her B.A. in Communication with a minor in Spanish. She studied in exchange programs across the globe, including the University of Qatar at Doha and University of Granada, Spain; and participated in a cultural exchange with Morocco and Japan. She is a recipient of the Public Leadership Education Network (PLEN) Scholarship. She is involved with a variety of nonprofits in the DC Community, such as the Junior League of Washington, Bright Beginnings, Inc.; the March of Dimes; and UNA-NCA.



### IES & BD

The Institute for Excellence in Sales (IES) helps sales professionals worldwide and in the DMV crush their quotas. IES is your trusted conduit to the best sales services, products, and content in the world. We have monthly programs in Tyson's Corner, VA for sales pros featuring presentations and workshops by some of the greatest sales thought leaders and authors on the planet, such as Neil Rackham, Challenger Sale author Matt Dixon, and The Referral Coach Bill Cates. The workshops are held at the USA Today Building.

The IES also holds the Mid-Atlantic region's only award program that recognizes corporate and organization sales excellence. This year's event will be on June 11, 2015, recognizing companies that have exhibited greatness in sales or BD such as CoStar, Wedding Wire, Cvent, Carahsoft, Brocade, Ellucian, Deltek, and Red Hat. This year's Lifetime Achievement Award winner is NetApp Sales leader Mark Weber. Our website is [i4esbd.org](http://i4esbd.org)



### FRED DIAMOND

Fred Diamond gets engaged by tech and professional services CEOs around the world because they need to increase sales, generate more revenue, bring new products to market, or grow into new markets. They realize that a more effective way to go-to-market will help accelerate sales.

With expertise garnered by working with world-class firms such as Apple, Compaq, Microsoft, and Oracle, Fred is the outsourced marketer of choice for technology and professional service CEOs looking to get their vision into the marketplace and sales leaders who know

# Big Idea CONNECTpreneur Summer Forum



## SPONSORS

that their companies can go-to-market better. His approach to marketing has especially been well received by international companies looking to enter US markets.

As the CEO of DIAMOND Strategic Marketing and the Institute for Excellence in Sales, he helps companies grow business in the right vertical markets, such as public sector markets, by designing, developing, implementing, and managing sound, smart, and strategic marketing efforts that accelerate business development.

## Big Idea CONNECTpreneur Summer Forum 2015

<b>SPEAKERS</b>			
First Name	Last Name	Title	Company
Tim	Chi	CEO and Co-Founder	WeddingWire and Blackboard
Tien	Wong	CEO	Tech 2000 and appnetic
Joe	Burkhart	Managing Director	Saratoga Investment Corp.
Leslie	Jump	Founder and CEO	Startup Angels
John	May	Founder and Former President	New Vantage Group and Angel Capital Association
Hank	Torbert	Principal	RLMcCall Capital Partners
Sever	Totia	Managing Director	Edison Ventures
<b>PRESENTERS</b>			
First Name	Last Name	Title	Company
<b>AgoraVR</b>			
Jason	Ganz	CEO	AgoraVR
Matthias	McCoy-Thompson	COO	Agora VR
Collin	Korandovich	Lead Developer	Agora VR
<b>Cirrusworks</b>			
David	Giannini	Executive Chairman	CirrusWorks
Beth	Crawford	CFO	CirrusWorks
<b>DASHUB</b>			
David	Sandler	Principal & Strategic Advisor	DASHUB
Matthew	Weitzman	Co-Founder, CTO	DASHUB
Michael	Lederman	Co-Founder, COO	DASHUB
<b>Delight Me</b>			
Marie-Louise	Murville	CEO	Delight Me, Inc.
Mike	Sullivan	CTO	Delight Me, Inc.
<b>Nitor Group, Ltd.</b>			
Buff	Colchagoff	Founder & CEO	Nitor Group, Ltd.
Doug	Hill	President & COO	Nitor Group, Ltd.
Kevin	Puscas	CTO	Nitor Group, Ltd.
<b>SNVC LC_helix</b>			
Tom	DeWitt	President & CEO	SNVC LC_helix
Beth	Miller-Herholtz	Chief Strategy Officer	SNVC LC_helix
Chuck	Vollmer	President	Jobenomics LLC (SNVC Board of Directors)
<b>SwitchPitch</b>			
Michael	Goldstein	Founder	SwitchPitch
Alyssa	Schwartz	Intern	SwitchPitch
<b>valAurum</b>			
Adam	Trexler	President	valAurum
Tom	Trexler	President	UV Design, Inc.
Marisa	Joelson	Financial Advisor	Merrill Lynch
Limor	Schafman	Vice President	Relativity Sciences
<b>PARTNERS</b>			
First Name	Last Name	Title	Company
<b>BDO USA, LLP</b>			
Mark	Andersen	Partner	BDO USA, LLP
Tony	DeFlumeri	Director	BDO USA, LLP
Andy	MacLean	Director	BDO USA, LLP
Dan	Adragna	OFS Director	BDO USA, LLP
Mark	Ellenbogen	Managing Partner	BDO USA, LLP
<b>Dingman Center for Entrepreneurship</b>			
Elana	Fine	Managing Director, Dingman Center for	University of Maryland
<b>Emissary Realty</b>			
Todd	Sherbacow	CEO	Emissary Realty
Bernadette	Walker	Director	Emissary Realty
<b>Fairfax County Economic Development Authority</b>			
Anne	Rosenblum	Capital Attraction Manager, IT & Life Sciences	Fairfax County Economic Development Authority
Debra	Claire	Business Development Manager	Fairfax County Economic Development Authority
<b>Georgetown University Entrepreneurship Initiative</b>			
Kevin	Barrow		Georgetown University

<b>PARTNERS</b>			
First Name	Last Name	Title	Company
<b>HafeziCapital International Consulting</b>			
Babak	Hafezi	CEO	HafeziCapital International Consulting
<b>Hogan Lovells</b>			
Richard	Becker	Partner	Hogan Lovells US LLP
<b>Institute for Excellence in Sales &amp; Business Development</b>			
Fred	Diamond	Founder	IES&BD
Hector	Velez	Managing Director	IES&BD
<b>McGladrey LLP</b>			
Chuck	Carr	Partner	McGladrey LLP
Mike	Fletcher	Partner	McGladrey LLP
<b>Meltzer Group</b>			
Rich	DiPippo	Partner	Meltzer Group
<b>Montgomery County Department of Economic Development</b>			
Ruth	Semple	Director, Finance Sector	Montgomery County Department of Economic Development
Fizie	Haleem	Managing Director, Technology Transfer & Commercialization	Montgomery County Department of Economic Development
<b>Ryan and Wetmore</b>			
Pete	Ryan	Partner	Ryan and Wetmore
Tessa	Lucero-Bennett	Associate	Ryan and Wetmore
Kelly	Standiford	Marketing Coordinator	Ryan and Wetmore
Danielle	Gallo	Manager	Ryan and Wetmore
<b>SmartCEO</b>			
Heather Louise	Finch	Market Director	SmartCEO
Rebecca	Rostowsky	Account Executive	SmartCEO
Meghan	Barry	Account Executive	SmartCEO
Kevin	Learned	Partner	McMahon, Welch and Learned
<b>Wharton Club of Washington, DC</b>			
Alan	Schlaifer	Chairman	Wharton Club of Washington, DC
Ali	Qureshi	Co-Chair, Healthcare & Biotech	Wharton Club of Washington, DC
<b>Wilson Sonsini Goodrich &amp; Rosati</b>			
Mike	Labriola	Partner	Wilson Sonsini Goodrich & Rosati
Mark	Holloway	Associate	Wilson Sonsini Goodrich & Rosati
Chelsea	Jenrette	Associate	Wilson Sonsini Goodrich & Rosati
<b>ATTENDEES</b>			
First Name	Last Name	Title	Company
Steve	Abramowitz	Chief Executive	CEO Boardroom
Imran	Aftab	Founder & CEO	10Pearls
Edward	Alexander		C2C SmartCompliance
Brian	Alexander	Chief Legal Officer	C2C SmartCompliance
Cora	Alisuag	President & CEO	CORAnet Solutions, Inc.
Dave	Anderson	President	Hitch
David	Anderson	CEO & Founder	Degree Of Trust
Walt	Anderson	Director	Esprit Data
Walt	Anderson	Director	Convergence Ltd.
Scott	Ankeny	CEO	GoingGreenToday
George	Aposporos	Co-Founder & Chairman	Playmark
Stephanie	Bailey	CMO	NerVve
David	Bain	President	TM Technologies, Inc.
Zvi	Band	CEO	Contactually
Henry	Barratt, Jr.	Managing Director	Blue Water Capital
Kevin	Barrow	Founder	MARK App
Tiziana	Barrow	Consultant	Ottoplay, Inc
Tim	Batchelor	Chairman	White Peak Capital
PJ	Bellomo	Co-Founder	CXO.zone
Robert	Bettmann	Co-Founder	Bun Out The Oven
Karthik	Bhat	Co-Founder & CEO	SecureDB
Peter	Black	Finance Manager	ePlus
Randy	Blake	Principal	Duncaster Investments
Chris	Bolster	Managing Partner	PublicRelay
Lesley	Boucher	VP, Consulting and Customer Experience	ORI
Kirsten	Brecht Baker	CEO	Global Professional Search



ATTENDEES			
First Name	Last Name	Title	Company
Michael	Burton	President	Burton Equity, LLC
Sue	Butler	CEO	CXO Resources, Inc.
Joseph	Callanan	President	Osprey Advisors
Alex	Capogna	Chief of Staff Intern	Tech 2000
Damarn	Carroll	CEO & Founder	OVER Media
Khalilah	Carroll	COO	OVER Media
Antonia	Chen	Financial Analyst	Tech 2000
George	Churchwell	Co-Founder & President	Tech 2000
Jackie	Churchwell	Chief of Staff	Tech 2000
Jeanne	Churchwell	Co-Founder & VP of Operations	Tech 2000
Sharon	Cichy		Psych Media
Derek	Coburn	CEO & Co-Founder	CADRE
Dan	Coffing	President & COO	Syntegrity: Intelligent Security
Dan	Cohen	President	DC RevGen
Buff	Colchagoff	Founder & CEO	Nitor Group, Ltd.
Bill	Collins	Chairman & CEO	The Collins Companies
Mike	Collins	Fairfax Outreach Director	Office of Congressman Gerry Connolly
S. Lynn	Cooper	Chief Social Officer	Socially Ahead
Judy	Costello	Acting Executive Director	BioMaryland
Steve	Cram	Founder	Ottoplay, Inc
Kevin	Cunningham	Principal	Leeds Novamark Capital
Thomas	Dann	Managing Director	Maryland Venture Fund
Christina	Daves	President	CastMedic Designs
Gordon	Davidson	Chairman	Lightsense Technology, Inc.
Bob	Davis	Principal	Robert Davis & Associates
Jake	Decicco	Co-Founder	Sunniva Caffe
Jordan	Decicco	Co-Founder	Sunniva Caffe
Taylor	Devine	Founder and Managing Partner	The CDI Group
Dan	Doran	Principal	Quantive Business Valuations
Chris	Duffus	Co-Founder	Leaf Savings
Mark	Dumas	CEO	PlanetRisk
Colin	Eagen	CEO	E Group
Jeff	Ellington	CEO	Concentric Health, Inc.
Asher	Epstein	COO	Access Health Group
Mark	Esposito	Director	Ernst and Young
Emilio	Fernandez	Managing Director	Pulse Capital
Dwight	Fischer	Principal	MetroNet
Josh	Fisher	Managing Director, Finance and Accounting	Hirestrategy
Chuck	Flanz	Manager	CohnReznick LLP
Ric	Fleisher	Co-Founder, EVP Corp Dev	Urgent.ly
Jed	Fochtman	President	Capital Advisors Corporation
Scott	Frederick	Former CEO	Automated Insights
Marc	Freedman	Chief Cost Evaluator	Expense To Profit
Robert	Gahagan	CEO	CCSI
Shervin	Gerami	CEO	TeleWorld Solutions
Glenn	Giles	CEO	Privia
Paul	Giordano	President	Pinellas Corporation
Thomas	Godin	COO	Gorove/Slade Associates
Andrew	Goldsmith	VP of Marketing	Rapiscan
Don	Goodwin	CEO	2b Agile
James	Gordon	CEO	CULTIVA Solutions
Jeff	Gordon	President	Print1 Printing
Ken	Gordon	Co-Founder & CEO	Potomac Health Solutions, Inc.
David	Gorodetski	President	Sage Communications, LLC
Jennifer	Graham	VP of Marketing	Kastle Systems
Chris	Grant	Executive Vice President	LSi Media
Idris	Grant	Co-Founder & Chairman	LSi Media
Sabine	Grant	CEO & President	LSi Media
Carl	Grant, III	EVP, Business Development	Cooley LLP
Carl	Grant, IV	MRC Group	Palm Beach Atlantic University
Steve	Graubart	CFO	1776
Michael	Greco	CEO	Venture Capital Solutions
Richard	Greene	President	RGA Biz Advisors/Venture Funding
Ingar	Grev	Managing Director	The Grev Group, LLC
Susan	Groter	Senior Business Performance Advisor	Insperty
Oleg	Gudym	Systems Engineer	Lore Systems
Justin	Guilder	Managing Director	PennAve One
Jeff	Guzy	CEO	Grace McLain Capital LLC
David	Hadsell	VP	HP
Robert	Hagerty	Associate	Farragut Capital Partners
Shameen	Hameed	CEO	ZH Healthcare
Tonja	Hardyman	Founder	BARKZY

ATTENDEES			
First Name	Last Name	Title	Company
Neil	Hare	CEO	GVC
David	Harris	Office Manager	NetStar Systems International
Kate	Harris	Chief Technical Recruiter	NetStar Systems International
Deepak	Hathiramani	CEO	Vistronix
Chris	Hayes	Chairman	Revere Bank
Hunter	Hayes	CEO	ZeroCycle
Jennifer	Hecht	VP of Business Development	BenComm
Dan	Henderson	Investment Director	CIT GAP Funds
John	Higginbotham	Chairman & CEO	Blue Ridge Networks
Doug	Hill	President & COO	Nitor Group, Ltd.
Kathryn	Hill	Founder	The DeVere' Group
John	Holiday	Angel Investor	
Crystal	Icenhour, PhD	CEO	Aperiomics
Connie	Inukai	CEO	Tip 'n Split LLC
Gloria	Jacobovitz	Technology Manager	Johns Hopkins Applied Physics Laboratories
Nelson	Jacobsen	CEO	Altavoz Entertainment
Mike	Jacoby	CEO	Broad Street LLC
Vinod	Jain	President & CEO	India-US World Affairs Institute, Inc.
Andrew	Johnson	Director of Operations	GIGATRUST
Gene	Johnson	CEO	GMS
Braun	Jones	Managing Member	Stonehaven Capital
Jiemin	Jordan	Partner	Decisive Investment Group
John	Kealey	CEO	Decision Lens
Joe	Kessler	Managing Partner	Next-Stage Development Group LLC
James	Kirchhoff	Co-Founder	MARK App
Ryan	Klavan	Intern	CIT GAP Funds
Rebecca	Klemm	Founder and CEO	NumbersAlive!
Rich	Kochman	Principal	Adaptive Consulting, LLC
Tom	Kohn	Executive in Residence	American University/Kogod
Matthew	Koll	President	410 Labs
Alex	Kopicki	CEO	Kinglet
Rachel	Koretsky	Founder	upace
Nick	Kovacic	Partner	The Nicholas Companies LLC
Brian	Kucik	Chief of Staff Intern	Tech 2000
Sean	Lam	VP International Program	I.M. Systems Group (IMSG)
Mary	Lange	VP of Marketing	Carahsoft
Aleks	Laska	Strategist	Improbable
Tony	Lau	Managing Director	Totus Strategic Partners
Jeannette	Lee	Private Investor	
Mike	Leurdijk	Vice	Core Capital
Marissa	Levin	CEO	Successful Culture
Martin	Levine	Founder & CEO	Whyttle
Oliver	Lewis	Head of Defence & Public Policy	Improbable & UK Foreign Office
Justin	Lichtenstaedter	Founder	Yapper
Nick	Linsmayer	Office Manager	Refraction
Bob	London	President	London, Ink LLC
James	Long	Managing Director	VCP
Alan	Luba	CEO	Human Resources Consultants LLC
Dennis	Lucey	Vice President	TKC Global
Richard	Lum	Managing Director	fs2e
Jackie	Luo	CEO	E-ISG Asset Intelligence
Brandon	Luong	Founder	GrindHub
Mary	MacPherson	President	M2Works
Jeffrey	Majka	CEO	Honeycomb Consulting Corp.
Fred	Malek	Managing Partner	District Hospitality Partners
Manish	Malhotra	President & CEO	Unissant, Inc.
Beth	Maloney	President	Palladian Partners
Janice	Mandel	Advisor	Routeam
Ghazenfer	Mansoor	Founding Partner	Technology Rivers LLC
Laura	Marquez	Chief of Staff Intern	Appnetic
Warren	Martin	Partner	Cherry Bekaert
Mike	Matalone	President	Excelsior
Wesley	McGee	Chairman	KSI Data Sciences, LLC
Sally	McHugh	Account Coordinator	SpeakerBox Communications
Tom	McMillen	Chairman & CEO	Washington Capital Advisors, LLC
Paul	McQuillan	Consultant	PlanetRisk
Art	Medici	Partner	Newport Board Group
Amir	Mehrbakshs	Chief of Staff Intern	appnetic
Stefan	Midford	President & CEO	Natural Insight
Brandon	Miller	COO	Pinxter
Robert	Miller	Managing Director	Flash Forward Ventures
Steve	Mooney	Partner	Chessicap
Kimberly	Moore	Founder	The Mom Valet

ATTENDEES			
First Name	Last Name	Title	Company
Terry	Moraska	CEO	Warrior Communications
Eugene	Mosby	CTO	OVER Media
John	Mourad	Chief of Staff Intern	Tech 2000
Kentaro	Murase	Co-Founder	ROAMER
Krishna	Narine	Founding Partner	Meredith & Narine
Zach	Nelkin	Chief Strategy Officer	Hungry Harvest
Bob	Nelson	President	Nelson & Company
Lowell	Nerenberg	Leadership & Management Coach	Coach Lowell
Katie	Nesbitt	Senior Account Supervisor	SpeakerBox Communications
Anh	Nguyen	Co-Founder	WANDERUS
Kim	Nguyen	Managing Partner	Brilliant Keypoint Investments
John	Nolan	CEO	Quadel Consulting
Mark	Norris	Founder & CEO	Go-Path, Inc.
Jennifer	O'Daniel	Director	CIT GAP Funds
Angie	O'Grady	Partner & COO	StellaPop Consulting
Gregory	Olson	Associate Vice President, Operations	Catapult Technology
Natalia	Olson	Regional Administrator, Mid Atlantic	US Small Business Administration
Paul	Opalack	Managing Director	Noblestar International, LLC
Geoff	Orazem	Managing Partner	Eastern Foundry
Teddy	Owen	Intern	Keiretsu Forum
Ilbay	Ozbay	CEO & Founder	Outroop Inc.
Corey	Passarella	Associate	The Carlyle Group
Joe	Paulini	CEO	Chexout
Marya	Pickering	Vice President Business Development	Vertical Jobs
Kevin	Puscas	CTO	Nitor Group, Ltd.
Waleed	Qamar	Co-Founder & CEO	MedNav
Rob	Quartel	Chairman and CEO	NTELX, Inc.
Phillip	Quatrini	Partner	Rimon Law Group
Helen	Qubain	Chief Innovation Officer	Innovation at Work
Harley	Radin	Private Investor	
Vinay	Raman	CEO	CAARMO
Ed	Redfern, Jr.	Founder/President & CEO	Holistic Aquatics, LLC
Katelyn	Robinson	Finance Manager	ePlus
Aaron	Rosenthal	Founder/CEO - Golfswell	Golfswell
Larry	Roshfeld	CEO	InferX Health
Chris	Ross	Senior Portfolio Manager	BNY Mellon Wealth Management
Michael	Ross	Chairman and CEO	Euclid Systems Corp.
Timothy	Ross	Partner	CohnReznick LLP
Sarah	Rumbaugh	Founder & CEO	Relish MBA
Margo	Sadow	Owner	Blowdrynow.com
Mickin	Sahni	Outreach & Strategy	Fosterly
Phil	Salopek	CEO and Co-founder	Illumineto
Liz	Sara	Managing Director	Best Marketing LLC
Michael	Sarvi	Co-Founder and CEO	GAMESCAPE
Suneel	Sawant	Chairman	Software International
Tom	Scholl	CEO	shoalscrollschool&skull
Leigh Ann	Schultz	Managing Director	MorganFranklin Consulting
Gerhard	Schwandt	President & CEO	Management Partners International, Inc.
Don	Seifman	Partner	Meyers & Alterman
Elizabeth	Shea	President and CEO	SpeakerBox Communications
Kevin	Sheehan	Founder & General Partner	Multiplier Capital
Parag	Sheth	Sr. Director	Eadius
Jenny	Shtipelman	VP, Relationship Manager	EagleBank
Henry	Sienkiewicz	CEO	OTS
Ranbir	Singh	President	GeneSiC Semiconductor
Michael	Slage	Co-founder	LiftOff Health
Drew	Smith	Co-Founder	WANDERUS
Bill	Smith	VP, Product & Growth	appnetic
Alan	Snyder	SVP Business Development	www.good.com
Anthony	Solazzo	Managing Partner	Masonboro Partners
Angie	Sparrow	Account Executive	Electronic Commerce
Julia	Spicer	Executive Director	Mid-Atlantic Venture Association
Matt	Stavish	Vice President	Republic Capital Access
Scott	Stephens	Executive Vice President	Bendure Communications
James	Stibbards	Director - Customer Solutions	Luminal
Bill	Stokes	Chairman	Washington Network Group
Mike	Stoltzfus	President & CEO	Dynamic Aviation
Danielle	Stradford	Creative Development	MARK App
Bill	Strathmann	CEO	Network for Good
Scott	Suhy	CEO	Defensive
Brent	Summers	Founder & CEO	Thought
Tony	Surak	VP Global Sales	Foundation DB
Jason	Syversen	CEO	Siege Technologies
Nader	Tamadon	Founder	Washingtonians

ATTENDEES			
First Name	Last Name	Title	Company
Jeff	Tennery	CEO	Moonlighting LLC
Chuck	Teubner	Chairman	SpringCM
Lisa	Throckmorton	COO	SpeakerBox Communications
Sean	Tibbetts	CEO & Co-Founder	CyberTimez
Joseph	Titlebaum	Co-founder	Mezzobit
Chris	Tully	Advisor	Sales Xceleration
Michael	Turner	CEO/Founder	Pyclid
Debbie	Tyler	Senior Advisor	Capefirst Funding
Amitabh	Varshney	Professor	University of Maryland
Charlie	Venus	Vice President	Brown & Brown Insurance Agency of VA
Adam	Viener	Chairman & Founder	imwave, inc.
Donnie	Vinson	VP, Finance	The Aspen Group
John	Warden	COO	PierceMatrix
Amber	Wason	Co-founder	Riide
Neil	Wasserman	Chief Design Officer	SynchCare, Inc
Tom	Weithman	Managing Director	CIT GAP Funds
Michael	Wellman	CEO	Virgil Security, Inc.
Ledger	West	Associate Partner	MACH37
Matt	Whitaker	Director	Clear Rock Associates
Jeff	White	CEO	Gravy
Keith	White	Founder & CEO	Scale Ventures
Gus	Williamson	Licensing Associate	The George Washington University
Judith	Wilson	Founder & CEO	Women's Weekly
Steve	Wiltse	Managing Member/ Investor	GF LLC
Ted	Wiss	Principal	Zigron Inc.
Darren	Womer	Investor	CGS-FedRAMP certified cloud
Jun	Yan	Founder	ANYBOX
Ken	Yarmosh	CEO	savvy apps
Jeff	Yentis	Founder	TopBox
April	Young	Managing Director	Hercules Technology Growth Capital
Drew	Zaleski	VP & Director IT Services	Lore Systems
Marc	Zbinden	Managing Partner	ValueBridge International
Hans	Zeigler	CFO/COO	E Group
John	Zett	VP Operations	Iluminage Beauty
Adam	Zuckerman	Founder	Fosterly
Mark	Zuckerman	CEO	Clear Government Solutions



**RELIABLE, COST EFFECTIVE IT & CLOUD SOLUTIONS**

## **Why Our Customers Choose Lore For Their IT Needs?**

We are 100% focused on our clients' goals and bring deep and broad IT expertise, flexibility and agility to make IT easier, friendlier and more reliable.

- Virtual CIO
- Cloud & Data Center
- Network Engineering & Management
- Professional Services

Reduce Cost

Mitigate Risk

Improve Performance & Reliability



**Oleg Gudym | Director, Business Development and Sales Engineering**

**Mobile: (703) 855 1155**

**[ogudym@lore.net](mailto:ogudym@lore.net)**

**[www.lore.net](http://www.lore.net)**



## FIVE REASONS SALES EFFECTIVENESS IS A TOP CHALLENGE

Today, buyers are more sophisticated than ever before, leading sales executives to search for ways to differentiate their company's sales process to stay competitive. Meanwhile, inefficiencies continue to plague the sales process. Despite "miracle" tools like CRM and salesforce automation that we've hyped as gamechangers, 71% of a sales representative's time is still spent not selling.<sup>(1)</sup>

- Salespeople consider up to 90% of materials created by marketing useless <sup>(1)</sup>
- Over 80% of training efforts are not retained by sales after 90 days <sup>(10)</sup>
- 25% of CSOs say their reps use their sales methodology less than half of the time <sup>(7)</sup>
- 46% of CSOs say their CRM tool adoption rate is low <sup>(7)</sup>
- 60% of B2B purchasing decision making is independently completed by the customer before the first sales call <sup>(6)</sup>

## HOW APPNETIC CAN SOLVE SALES PROBLEMS

Armed with Appnetic, sales reps can collaborate better with their team and clients to:

**Win more deals.** Tablets deliver a distinctive client experience and real-time access to the right information to advance the sale. Appnetic's solution offers:

- Improved time to market by making it faster and easier to deploy, update, and adapt sales programs in the field

**Improve productivity.** A study by CDW IT Monitor found 74% of IT decision makers indicated that using tablets and smartphones has led to an increase in productivity in their organization.<sup>(11)</sup> Appnetic can help you boost sales performance by:

- Allowing salespeople to complete work any place, any time — with or without an internet connection
- Providing fast and flexible access to product catalogs, workflow management, and CRM systems from one central "hub"
- Eliminating the costs of printing, storing, and distributing paper-based sales collateral and pitch books
- Helping sales reps get up to speed faster with sales guides, coaching tools, and playbooks that reinforce training and coaching investment in real selling situations

**Sell smarter.** Now you can unlock the power of analytics to quickly interpret and optimize the sales approach. Appnetic empowers sales teams through:

- Uncovering previously unseen data trends on performance, customer insights, and market trends
- Capturing, identifying, and sharing best practices of top performers
- Providing data-driven decision support in the field to support better cross-selling recommendations, consultative selling, and advice

Leading sales organizations are starting to use Appnetic to create engaging mobile experiences that deliver transformational business results. The Sales Management Association found that 70% of sales organizations using tablets are already realizing a positive return on their investment. <sup>(2)</sup>

NEED HELP WITH IT ALL? TALK TO ONE OF OUR FOUNDERS TODAY.

Sales in motion.



Always-On  
Connectivity



Data-Driven  
Decision Support



Direct Links to  
Marketing Materials



Machine-to-Mobile



On-Site Quotes



Custom Client  
Briefcase



Live Tracking



Language  
and Content  
Localization



Improve  
Communication



Social Selling



Advanced Search



Real-Time Content  
Access

### THE ADVANTAGES OF APPNETIC

Combining the unique capabilities of tablets with the power of social, analytics, and cloud computing Appnetic can yield sales productivity improvements not achievable with personal computers.

Sales teams are clamoring to adopt Appnetic because it makes work simple, intuitive, and easy.

- Navigate content quickly with multi-touch tablet interface and advanced search tools
- Share rich video, 3D animations, graphic images and visual ordering tools with clients
- Gather and record more client information during sales interactions using image and voice capture, interactive survey tools and location-based services
- Collaborate with clients face-to-face because several people can see the same content at once

**Sales organizations that used mobile CRM and social sales tools won 7% more deals than their peer firms who did not use mobile tools**





# Big Idea CONNECTpreneur Summer Forum



## NOTES

## A SPECIAL THANK YOU TO OUR COACHES

**Big Idea**  
**CONNECTpreneur**



**JIM HAYDEN**  
Assurance Partner  
**BDO**



**MIKE LABRIOLA**  
Partner  
**Wilson Sonsini Goodrich  
and Rosati**



**BOB LONDON**  
President  
**London, Ink**

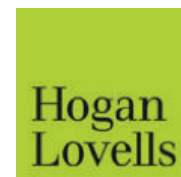
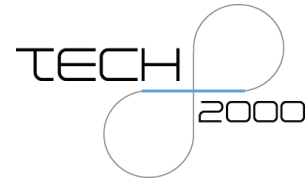


**MARISSA LEVIN**  
Founder & CEO  
**Successful Culture**



**BABAK HAFEZI**  
CEO  
**HafeziCapital International  
Consulting & Investing**

# THANK YOU TO OUR PARTNERS



Next CONNECTpreneur Fora: September 17 and December 10, 2015