



19TH ANNUAL MEDIA & TECH CONFERENCE

Maintaining a Winning Mindset

April 24, 2023
The Pierre, NYC



WELCOME MESSAGE



“
**TRUSTED INSIGHTS.
EXPERT ADVICE.
OUTSTANDING
RESULTS.**
”

Greetings,

Welcome to our 19th Annual Media & Technology Conference, focusing on “Maintaining a Winning Mindset.” We are delighted you could join us for this event, bringing together a senior level audience of executives and investors from across the global media, marketing, information and technology sectors.

We have assembled an impressive roster of A-list speakers for today’s program who will share insights and case studies on how to stay ahead of fast-paced changes in the industries we serve; how to innovate and transform business models in response to rapid developments in the use of technology and data; and how to leverage M&A to drive growth and enhance product and service offerings. We look forward to hearing from this great group of speakers!

Our goal today is to present new ideas and opportunities that stimulate thinking in the context of your own business models, while also allowing time for quality networking. In the end, we hope you come away from the event with at least three compelling ideas to take back to your office to share with your peers, as well as new business contacts to re-connect with in the days and weeks ahead.

As always, we are extremely grateful for the wonderful support of our world-class sponsors, including: BDO; The Boston Consulting Group; Buffkin / Baker; Datasite; H2K Labs; and Morgan Lewis. We would also like to thank our speakers for contributing their time and effort to our program.

We are pleased that you could join us today and hope you have time to connect with at least one of the JEGI CLARITY leaders while you are here.

Sincerely,
Wilma H. Jordan

A handwritten signature in black ink that reads "Wilma H. Jordan". The signature is fluid and cursive, with a large initial 'W'.

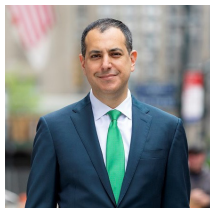
Founder & CEO
North America
JEGI CLARITY

JEGI CLARITY 19TH ANNUAL MEDIA & TECH CONFERENCE
APRIL 24, 2023, THE PIERRE, NYC

LEADERSHIP TEAM – NORTH AMERICA



WILMA JORDAN
Founder & CEO, N.A.



ROBERT BERSTEIN
Managing Director



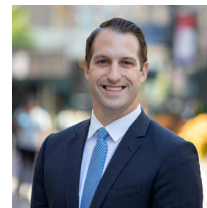
HUGH BOSTON
Managing Director



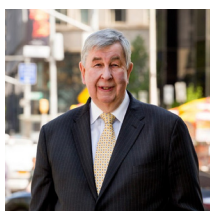
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Managing Director



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Managing Director



RICHARD MEAD
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KEVIN MOORE
Managing Director



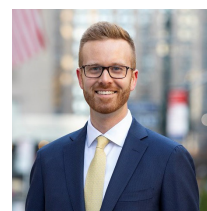
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KATHLEEN THOMAS
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AMANDA CUNANAN
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KEVIN FINNEGAN
Director



STEPHEN SHANKMAN
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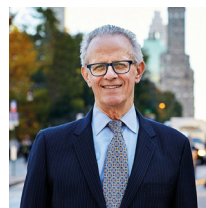
JON THACKERAY
Director



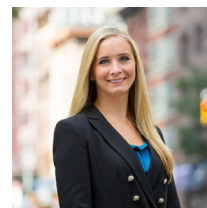
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BILL HITZIG
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VP, Marketing

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Partner



SAN DATTA
Partner



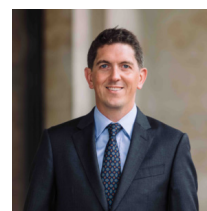
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Partner



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MARVIN MAERZ
Director



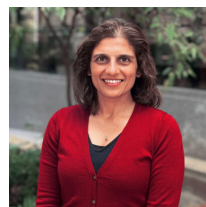
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Director



JONATHAN GOODALE
Chief BD Officer



NATI CUCALON-ROBLES
Marketing Director



AMRITA JAIJEE
General Counsel and
Compliance Director



SEWRA ALAZAR
Finance Manager

AGENDA

11:30am	Registration and Lunch Served
11:55am – 12:00pm	Opening Remarks Wilma Jordan, Founder & CEO, North America JEGI CLARITY
12:00pm – 12:30pm	Catch the Moment Adam White, Founder & CEO Front Office Sports David Tyree, Entrepreneur, Sports Analyst & Former NFL Player
12:30pm – 1:00pm	The CEO Perspective: What it Takes to Win in the Changing Market Research Landscape John Rose, Managing Director & Senior Partner Boston Consulting Group Tod Johnson, Co-Founder & Managing Director Duo Partners Consulting Karyn Schoenbart, Co-Founder & Managing Director Duo Partners Consulting
1:00pm - 1:30pm	JEGI CLARITY Sector Insights Vincent Létang, EVP, Managing Director, Global Market Intelligence MAGNA JEGI CLARITY Leaders
1:30pm – 2:00pm	Finding Competitive Advantage Through Your Revenue Organization Moderator Heather Holst-Knudsen, CEO & Founder H2K Labs Panelists Lisa Hannant, Chief Executive Officer Clarion Events Paul Miller, Chief Executive Officer Questex Matt Yorke, Global Chief Revenue Officer Foundry
2:00pm – 2:30pm	Dotdash Meredith: The Modern Media Company Everyone Should Know Colin Morrison, Founder, Publisher & Editor Flashes & Flames Neil Vogel, Chief Executive Officer Dotdash Meredith
2:30pm – 2:45pm	An AI Conversation with Steppenwolf Carl Fremont, Chief Executive Officer Quigley Guy Gadney, CEO & Co-Founder Charisma Entertainment
2:45pm – 3:00pm	Recent Legal Developments in the Transactional World Robert Dickey, Partner Morgan Lewis

AGENDA

3:00pm – 3:45pm	Break
3:45pm – 4:15pm	Inside the Winning Mindset: Building the Leading Global Programmatic Media Partner Marcus Anselm, Partner JEGI CLARITY Gurman Hundal, CEO & Co-Founder MiQ
4:15pm – 4:45pm	Perspectives from the M&A Supply Chain Moderator Adam Gross, Managing Director JEGI CLARITY Panelists Jeffery Hudson, SMD Institutional Distribution & Origination Libertas Funding Jonathan Roberts, Principal, Transaction Advisory Services BDO Mark Williams, Chief Revenue Officer, Americas Datasite
4:45pm – 5:15pm	Personalized Customer Experience in the Era of Machine Learning and AI Moderator Chris Kuenne, Founder & CEO Rosemark Panelists Derek Correia, President ReserveBar Keith Schwartz, Co-Founder & CEO Bounteous Mark Taylor, Global Practice Lead, Digital Experience Cognizant
5:15pm – 5:45pm	Staying in the Fast Current Wilma Jordan, Founder & CEO, North America JEGI CLARITY David Williams, Founder, Chairman & CEO MRE Capital
5:45pm – 7:00pm	Closing Remarks and After Party

To view the biographies of today's speakers, please scan the QR code or visit this link:
www.jegiclarity.com/wp/wp-content/uploads/2023/04/2023-Speaker-Bios.pdf



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The Boston Consulting Group (BCG) is a global management consulting firm and the world's leading advisor on business strategy. BCG partners with clients in all sectors and regions to identify their highest-value opportunities, address their most critical challenges, and transform their businesses.

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H2K Labs empowers leaders to achieve profitable revenue growth in an ever-evolving market, with solutions that turn data into a strategic asset.

H2K Labs understands the complex challenges B2B media, events, and digital information industries face in generating sustainable, long-term profitable revenue growth. With over 30 years of operational experience in the industries we serve, we empower our customers to achieve profitable, efficient, and scalable revenue growth in a rapidly evolving market. We have developed a data-first, modular, continuous improvement framework to help customers make revenue a core business process and a center of operational excellence. Our data management and analytics platform, Insightify, and data and revenue-focused advisory services are specifically built for the industry to future-proof your business.



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Founded in 1873, Morgan Lewis offers more than 2,200 lawyers and specialists—in 30+ offices across North America, Asia, Europe, and the Middle East.

RECENT TRANSACTIONS

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JEGI CLARITY (www.jegiclarity.com), is a pre-eminent M&A advisory firm for the media, marketing, information and technology industries. With a global reach from New York, London, Boston, Sydney and San Francisco, we have closed more than 800 transactions during our 35+ year history.

 HAS SOLD  Brierley TO  Capillary	 HAS MERGED WITH  v lex A PORTFOLIO COMPANY OF  Oakley Capital	 HAS BEEN SOLD TO  Keywords Studios	 HAS RECEIVED INVESTMENT FROM  EUREKA EQUITY PARTNERS	 HAS RECEIVED INVESTMENT FROM  Capital-A INVESTMENT PARTNERS
 HAS SOLD ENTERPRISE DIVISION ASSETS TO  Robin	 HAS SOLD ITS INTAPP SOLUTIONS DIVISION TO  WILSON ALLEN A PORTFOLIO COMPANY OF  RENOVUS CAPITAL	 HAS INVESTED IN  snigel	 HAS BEEN SOLD TO  innovate MR A PORTFOLIO COMPANY OF  CIVC PARTNERS	 HAS RECEIVED INVESTMENT FROM  MOUNTAINGATE CAPITAL
 HAS BEEN SOLD TO  LEEDS Equity Partners	 HAS SOLD Executive  Hir Technology TO  ARC BE IN THE KNOW A PORTFOLIO COMPANY OF  EAGLETREE CAPITAL	 HAS INVESTED IN  MiQ	 HAS BEEN SOLD TO  DEPT	 A PORTFOLIO COMPANY OF  MONROE CAPITAL HAS BEEN SOLD TO  SUMMIT PARK

RECENT TRANSACTIONS

 <p>L.A.C GROUP</p> <p>A PORTFOLIO COMPANY OF</p>  <p>RENOVUS CAPITAL</p> <p>HAS MERGED WITH</p>  <p>WILSON ALLEN</p>	 <p>RENOVUS CAPITAL</p> <p>HAS ACQUIRED</p>  <p>L.A.C GROUP</p>	 <p>QUEEN'S PARK EQUITY</p> <p>HAS RAISED FINANCING FACILITIES FOR</p> <p>futuredeluxe</p>	<p>SPARK451</p> <p>HAS BEEN SOLD TO</p>  <p>Jenzabar</p>	 <p>Bridgepoint</p> <p>HAS ACQUIRED</p>  <p>team iig</p> <p>A PORTFOLIO COMPANY OF</p> <p>EQUISTONE</p>
<p>DIGITAL TRANSFORMATION CONSULTANCY (DACH)</p> <p>HAS RECEIVED INVESTMENT FROM</p> <p>UNNAMED PRIVATE EQUITY INVESTOR</p>	 <p>ANNEX CLOUD</p> <p>HAS RECEIVED INVESTMENT FROM</p>  <p>OPENGATE CAPITAL</p>	 <p>JELLYFISH PICTURES</p> <p>HAS RECEIVED INVESTMENT FROM</p> <p>KCP KEY CAPITAL PARTNERS</p>	 <p>EMH PARTNERS</p> <p>HAS INVESTED IN</p>  <p>SMARKETER</p>	 <p>iMemories</p> <p>HAS RECEIVED INVESTMENT FROM</p>  <p>LANDON CAPITAL PARTNERS</p>
 <p>radius</p> <p>HAS RECEIVED INVESTMENT FROM</p>  <p>STAR MOUNTAIN CAPITAL</p>	 <p>AmericanLegalNet</p> <p>HAS BEEN SOLD TO</p>  <p>Aderant</p> <p>A DIVISION OF</p>  <p>ROPER</p>	 <p>mobeus</p> <p>HAS INVESTED IN</p> <p>InboxInsight</p>	<p>Established</p> <p>GOODSTUFF</p> <p>MEME TRENDS</p> <p>HAS BEEN SOLD TO</p>  <p>STAGWELL</p> <p>TRANSFORMING MARKETING</p>	<p>Spend Matters</p> <p>HAS BEEN SOLD TO</p> <p>COPLEY EQUITY PARTNERS</p>
 <p>MAVERICK DIGITAL</p> <p>HAS MERGED WITH</p>  <p>media.monks</p> <p>A SUBSIDIARY OF</p>  <p>S4 CAPITAL</p>	 <p>CONSERO</p> <p>HAS BEEN SOLD TO</p>  <p>CLARION ASSET</p> <p>A PORTFOLIO COMPANY OF</p>  <p>Blackstone</p>	 <p>hometalk</p> <p>HAS BEEN SOLD TO</p>  <p>verticalscope</p>	<p>THE CHANNELCO.</p> <p>A PORTFOLIO COMPANY OF</p>  <p>STONE GOFF</p> <p>HAS BEEN SOLD TO</p>  <p>EAGLETREE CAPITAL</p>	 <p>CrescoData</p> <p>Connecting Commerce</p> <p>HAS BEEN SOLD TO</p> <p>pitney bowes</p>
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NOTES

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