

AFTERNOON BREAKOUT SESSIONS

1ST SESSION 1:40–2:10 PM

2ND SESSION 2:15–2:45 PM

SESSION 1 1:40 – 2:10 PM

The Future of Work: Harnessing AI's Potential While Navigating Emerging Risks

Sarah Grimstead, Insperty

Artificial Intelligence presents transformational opportunities to boost workplace productivity and efficiency. However, businesses must thoughtfully implement these powerful technologies to minimize legal, ethical, and security risks. This talk will explore best practices for safely realizing AI's benefits, including protecting IP and training employees to use AI responsibly. By understanding both the potential benefits and risks of AI, businesses can strategically adopt these technologies while safeguarding their interests.

Managing Cash & Extending Runway in a Capital Constrained World

Mike Bergines, Armanino LLP

In the last 18 months, tech companies have had to pivot from growth-at-all-costs mindset when money was readily available to focusing on profitability and efficiencies to extend their runway. Mike Bergines is a former SaaS CFO and currently head of Armanino's Strategic Finance Outsourcing team. Mike will share advice he gives to CFOs on how to increase the value of their company today while managing cash and burn.

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SESSION 2 2:15 – 2:45 PM

5 Checkpoints for Mastering Your Recurring Revenue

Lori Palmer, Oracle Netsuite

Discover the critical elements of customer onboarding and retention that can significantly impact your bottom line. Consider pricing strategies that not only attract new customers but also optimize revenue from your existing client base. Learn about subscription metrics/analytics to make data-driven decisions that drive growth. Join this session as Lori Palmer and the NetSuite team delve into essential strategies and practices for subscription-based companies.

Metrics that Matter:

KPIs to Attract Capital & Accelerate Growth

Mark Wald, Sprchrgr

Patricio Utz, Abstract

Mark Wald, SPRCHRGR, a startup finance and account consultancy and Patricio Utz, Co-Founder of Abstract, an AI-powered "Atlassian for government data", will take you through a deep dive of the SaaS-specific KPI reporting and analytics they are using. They will demonstrate specific insights into true customer LTV, optimizing capital efficiency; benchmarking their performance against best-in-class peers; and preparing for the most rigorous diligence questions that investors will be asking in the next fundraising.

Term Sheets 101

Brad Zions, Pitbull Ventures

Peter Cowen, Sutton Capital Partners

Ophir Tanz, Pearl

Learn from an investor and an entrepreneur some of the basics of Term Sheets. While this is not a binding legal document, the term sheet serves as a framework for the relationship between the founder and the investor. Be in position to know before you sign on the dotted line!