



**Executive Producer:**  
Christina Riboldi, EVP  
IBF Conferences, Inc.  
[Christina@ibfconferences.com](mailto:Christina@ibfconferences.com)  
Tel: (516) 765-9005

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*12th Annual*  
***CORPORATE VENTURING & INNOVATION  
PARTNERING  
Conference***

**February 23-25, 2010**

**The Hyatt Regency Resort & Spa, Newport Beach, CA**

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**MARKET LEADERS CONTINUALLY NEED TO INNOVATE AND  
TRANSFORM THEIR BUSINESSES TO SUCCEED AT INNOVATION**

**CORPORATIONS NEED OPEN INNOVATION TO FIND NEW IDEAS  
FROM INSIDE AND OUTSIDE THEIR FIRM**

***CORPORATE VENTURING AND INNOVATION PARTNERING  
HELPS ACHIEVE THIS GOAL***

***Audience Profile:***

Uniting corporate investors, new business development executives, venture capitalists, private equity investors, mergers & acquisition executives, institutional investors, technology transfer experts, licensing executives, investment bankers, corporate counsel, CTOs, CIOs, CEOs and CFOs of emerging growth companies.

***About this conference:***

This annual event provides corporate executives, innovation officers and corporate investors with strategies to gain a competitive advantage through corporate venturing and innovation initiatives. Over two days, attendees will have an opportunity to share B2B alliance models, investment approaches, strategies to capture technology innovation from external sources, and insights on ways to enhance their corporate venturing initiatives.

***Program development:***

Topics are influenced by the advisory board of corporate investors and business development executives.

Advisory Board Members include:

- **Robert Ackerman**, Founder, Allegis Capital
- **Heidi Mason**, Co-Founder, The Bell-Mason Group
- **Rob Rosenberg**, Founder, New Venture Partners
- **Reese Schroeder**, Managing Director, Motorola Ventures
- **Phil Giesler**, Director of Innovation, Physic Ventures
- **Brad McManus**, Director of Investments, Panasonic Ventures
- **Jennifer Jones**, Founder, Jennifer Jones & Partners
- **Spencer Ante**, Associate Editor, BusinessWeek

**TUESDAY, FEBRUARY 23, 2010**

**CORPORATE VENTURING SESSIONS**

**7:30 - 8:30 am**

***Conference Registration & Continental Breakfast***

**8:15 – 8:25 am**

**Larta Institute Breakfast Briefing:  
*Sourcing Opportunities & Partnering with Government:  
The \$2B Innovation Pipeline***

The Small Business Innovation Research (SBIR) Program engages with the nation's small, high-tech, innovative businesses as a significant part of the federal government's research and development efforts. The SBIR program operates across 11 federal departments and collectively deploys \$2B each year (via a phased grant process) to advance the commercial potential of early stage innovations. This pipeline provides industry partnering and alliance managers a channel to spot next generation products and the solutions of tomorrow. Larta Institute, a leading global non-profit commercialization firm, partners exclusively with NIH, NSF, and USDA to mentor/advise promising SBIR-funded companies arising from this program on their go-to-market strategies.

**8:25 – 8:30**

**IBF WELCOME**

**8:30– 9:00 am**

**CONFERENCE WELCOME & OPENING REMARKS FROM THE CHAIRMAN**

**Robert R. Ackerman, Jr.**  
Managing Director  
Allegis Capital

**9:00 – 10:00**

**Opening General Session**

**THE CORPORATE VENTURING IMPERATIVE IN CHALLENGING MARKETS**

**Reese Schroeder**  
Managing Director, Motorola Ventures  
Motorola, Inc

**Dan Keoppel**  
Executive Director, Strategic Investments  
Verizon

**Kuk Yi**  
Managing Partner  
Best Buy Capital  
BestBuy

**Moderator:**  
**Robert R. Ackerman, Jr.**  
Managing Director  
Allegis Capital

**10:00 – 10:30**

***Morning Networking & Refreshment Break***

**10:30 – 11:30**

**General Session**

**CREATING CORPORATE VENTURES: SPIN UPS, SPIN INS, SPIN OUTS**

**John Riggs**  
Vice President  
Alcatel Lucent Ventures

**Jacqueline LeSage Krause**  
VP, Innovation & Corporate Venture Capital  
The Hartford

**Moderator:**  
**Rob Rosenberg**  
Partner  
New Venture Partners

11:30 – 12:30

**General Session**

**BUILDING MARKET ECOSYSTEMS THROUGH CORPORATE VENTURING MODELS**

**Panelists:**  
**Will Rosenzweig**  
Co-Founder & Managing Director  
Physic Ventures

**Nagraj Kashyap**  
Vice President  
Qualcomm Ventures

**Alex Marquez**  
Director  
Intel Capital

**Moderator:**  
**Brad McManus**, Director of Investments, Panasonic Ventures

12:30 – 2:00

***Outdoor Luncheon Reception***

**Keynote Speaker**

**Dr. Val Livada**  
Senior Lecturer  
Sloan School of Business at MIT



Val is Senior Lecturer on Corporate Entrepreneurship, at the Sloan School of Business at MIT, where he also founded the Strategic Investors Forum, a network of corporate venture capital groups . He recently completed a joint program with Wharton and a survey with Ernst & Young on corporate venture capital trends. Val brings 30 years of consulting experience to his clients. He was a Director at Braxton Associates, an international strategy planning consulting firm, and a Vice President at Pugh-Roberts Associates, a technology and innovation management firm Through the years, clients have included Fortune 500-type companies such as: GM, Eli Lilly, Nokia, Hitachi as well as numerous startups Val sits on the Board of Directors for Monarch Antenna, a Delphi Automotive spinout, and Polynova Composites, a nanomaterials startup. He is business advisor to several early stage companies including: Liquid Bits a 3D animation start-up, Vanguard Solar, a thin film photovoltaic company, LuminZ an MIT spin out in LED lighting, Porticus a voice printing company, and Rapport Inc. a multicore chip company. He often coordinates strategic alliances between large and small companies.

2:00– 2:45

**General Session**

**STATE OF TRADITIONAL EXITS &  
STRATEGIES TO REALIZE FINANCIAL GAINS IN TOUGH TIMES**

**Panelists:**

**James Montgomery**

Chief Executive Officer  
Montgomery & Co., LLC

**Brewer Stone**

Co-Founder  
FBR Capital Markets

**Chad Keck**

Vice Chairman  
Needham & Company

**Moderator:**

**Brian Deagon**

Technology & Business Journalist  
Investor's Business Daily

2:45 – 3:30

**STRATEGIC VENTURE INVESTING & OTHER NON-INVESTMENT PARTNERING MODELS**

- What does “strategic value” mean to your team and most importantly, how does your parent company define and view your “strategic value”
- Co-investing & developing strong syndicates
- Why each side takes the positions it does
- How to find syndicate partners
- Innovative ways to mix business and equity terms in a transaction
- Examples: please provide some examples of challenges and successes you have faced as corporate investors

**Claudia Fan Munce**

Managing Director  
IBM Venture Capital Group

**Dan’l Lewin**

Corporate VP for Strategic and Emerging Business Development  
Microsoft

**Luis Llovera**

Managing Director  
Robert Bosch LLC

**Russell Pyne**

Managing Director  
Atrium Capital

**Moderator:**

**Jay Eum**

Co-Founder & Managing Director  
Translink Capital

3:30 – 4:00

***Afternoon Networking & Refreshment Break***

4:00 – 5:00

**Concurrent Sessions**

**Session A:**

**INVESTING IN THE IP MARKETPLACE:**

**NEW BUSINESS MODELS FOR PATENT ACQUISITION, ENFORCEMENT & DEFENSE**

- Pros & Cons of Patent Pure-Play Investing vs. investing in Technology
- Where's the money coming from
- What kinds of business models are being funded
- What factors affect the investment decision

**C. T. Pew**

Managing Partner  
Pipeline Capital Management LLC

**Demetris Paraskevopoulos**

Managing Director  
Nif/T

**Peter Holden**

Partner / Head  
IP Investment Group  
Coller Capital

**Izhar Armony**

General Partner  
Charles River Ventures

**Scott Elliott**

Partner  
Ropes & Gray LLP

**Moderator:**

**Ron Laurie**, Chairman, Inflexion Point Strategy LLC

**Session B:**

**REBALANCING PORTFOLIOS &**

**ACHIEVING LIQUIDITY WITH SECONDARY FUNDS STRATEGIES**

**Mike Gridley**

Principal  
Industry Ventures LLC

**Tom Newby**

Principal  
Lexington Partners

**Bryon Sheets**

Partner  
Paul Capital

**Christian Munafo**

Principal  
Thomas Weisel Global Growth Partners

**Moderator:**

**Bart Schachter**

Managing Director Corporate Development / M&A  
National Semiconductor

5:00 – 7:00

**COCKTAIL RECEPTION FOR ALL ATTENDEES**

**Hosted by: Allegis Capital**

**INNOVATION PARTNERING SESSIONS**

7:00 – 8:15 am **Conference Registration & Continental Breakfast**

8:00 – 8:15 **Strategic Venture Association/SVA Breakfast Briefing**

8:15 – 8:45 am **DAY 2 CONFERENCE WELCOME FROM THE CHAIRMAN**

**Robert R. Ackerman, Jr.**, Managing Director, Allegis Capital

8:45 – 9:45 am **Keynote Presentation**

***Deborah Hopkins***

Chairman of Venture Capital Initiatives  
Chief Innovation Officer, Citigroup  
Citigroup



**About Ms. Hopkins:**

Deborah Hopkins was named as Citi's first Chief Innovation Officer in 2008. The new role was created to bring together strategy, information technology and research and development to drive cross-business, client-focused innovation across the company. Ms. Hopkins also serves as Managing Director and Senior Advisor to Citi's Institutional Clients Group, supporting and advising Citi's Investment Banking clients. She is Co-Chair of the Citi Women's Initiative.

As Chief Innovation Officer, Ms. Hopkins is responsible for developing and leading Citi's approach to creative, forward-looking collaboration with external constituencies, including current and prospective clients, venture capital firms, government agencies and academic institutions. She also oversees the creation and direction of methods to maximize the internal creativity of Citi's newly reorganized corporate structure with the goal of creating operating efficiencies across global products, regions and the enterprise as a whole. Since joining Citi in 2003, Ms. Hopkins has held several senior roles at the company. From 2003 to 2005, she was Chief Operations & Technology Officer and Chief Information Security Officer for Citi. Prior to that, she was Head of Corporate Strategy, Mergers & Acquisitions. Ms. Hopkins also has held senior level positions at several global companies, including Chief Financial Officer for The Boeing Company and Lucent Technologies. Prior to that, Ms. Hopkins was Vice President of Finance for General Motors Europe.

9:45 – 10:00 **Morning Networking & Refreshment Break**

10:00 - 11:00 **General Session**

**INNOVATION PARTNERING IN ACTION:  
EXPLORING NEW MODELS FOR EMERGING BUSINESSES**

**Panelists:**

**Debbie Brackeen**

VP, Strategic Alliances  
Hewlett-Packard

**Dion Lisle**

EVP  
Citigroup Growth Ventures

**Sonny Jandial**

Brand Manager  
Procter & Gamble FutureWorks

**Moderator: Heidi Mason**, Co-Founder, The Bell-Mason Group

**FIRESIDE CHAT:**

**BUSINESS TRANSFORMATION THROUGH TECHNOLOGY INNOVATION**

*Keynote Speaker:*

**Dr. Hossein Eslambolchi**

Chairman and CEO, 2020 Venture Partners  
Former CTO of AT&T, President & CEO of ATT Labs  
and President & CEO of AT&T Global Network



*Interviewed By:*

**Aaron Ricadela**

Technology Writer  
BusinessWeek

*About Dr. Eslambolchi:*

Joining AT&T Bell Laboratories in 1986, Dr. Eslambolchi rose to become Global Technology Officer, Chief Technology Officer, Global Chief Information Officer, President & CEO of ATT Labs and President & CEO of AT&T Global Network Services and was 16B officer of the company since 2001. He also served as a critical member of AT&T's governing Executive Committee. As the Chief Transformation Officer at AT&T he developed and executed a comprehensive four-stage strategy that created/reshaped the company's enterprise customer service, network transformation, services and cultural transformation: the overhaul and remodeling of the company that SBC dubbed the "new AT&T".

Dr. Eslambolchi served as CTO for AT&T and advised its top leaders on the formulation and implementation of a strategic technology vision from 2001 to 2005. Early on, he predicted that IP would "eat everything" and advocated an architecture that would allow all services to run on IP and work together with connectivity to any device.

The quintessential telecommunications visionary, Dr. Hossein Eslambolchi champions the creation and delivery of pragmatic state-of-the-art transformational business strategies. Dr. Eslambolchi, Chairman and CEO of 2020 Venture Partners, is recognized in the scientific community as one of the foremost thought-leaders and technological scientists of the high-tech age. He has been compared to GE's Jack Welch for his leadership in business transformation in the global communications industry, and to Thomas Alva Edison for his significant scientific contributions in the field of IP and wireless communications.

**Case Study Illustrations**

**OPEN INNOVATION IN ACTION**

Qualcomm, Syngenta & Unilever will spotlight incubating, spinning out, and managing success for new 'open innovation' business opportunities

**Phil Giesler**

Director of Innovation  
Physic Ventures  
Unilever

**Derek Norman**

Investment Manager  
Syngenta Ventures

**Nagraj Kashyap**

Vice President  
Qualcomm Ventures

**Facilitator: Andrew Gaule**, Founder, H-I Network

12:45 – 1:45

***Luncheon Reception***

1:45 – 2:30

**Keynote Presentation**

**(OPEN) INNOVATION: P&G's LIFE BLOOD**

**Stephen Meller**  
Chief Innovation Catalyst  
P&G



Dr. Meller is originally from Adelaide, South Australia. He received his B.Sc., B.Sc. (Hons.), and PhD from the University of Adelaide. After travelling the world for a year, he spent 6 years at the University of Iowa, on the research faculty in Pharmacology studying the basic mechanisms underlying chronic pain before moving to the Procter and Gamble Company in 1994. Since moving there 14+ years ago, he has held various R&D roles in Health Care where he was ultimately responsible for the Health Care Technology and Clinical organizations. For the last 5 years, he has been in a corporate role where he is now on the leading edge for the global open innovation programs at P&G (Connect + Develop<sup>SM</sup>; C+D<sup>SM</sup>). In that role, he now serves as Chief Innovation Catalyst, in addition to leading the global technology innovators and entrepreneurs “community of experts”, the North American and Latin America open innovation hubs and several key business and technology platforms across the company. He regularly speaks on C+D<sup>SM</sup> around the globe. P&G has been recognized externally for its C+D<sup>SM</sup> by being listed as one of the top 10 most innovative companies in the world for the last 5 years. Also during that time, Dr. Meller has been a key driver on the technology strategy approaches for P&G's Sustainability and Industrial Biotechnology programs and its impact on global consumers. He regularly speaks on Industrial Biotechnology around the globe and its role in driving sustainability.

2:30 – 3:15

**Keynote Presentation**

**BUILDING A CULTURE OF INNOVATION**

Companies that innovate well often share in common a culture of optimism. This type of culture exemplifies a company's belief that its employees are extremely capable and serves as fertile breeding ground for extraordinary innovation and entrepreneurial spirit. This presentation will discuss what building a culture of innovation looks like and how principles of supporting innovation can be used across multiple industries.

**Brendan Boyle**  
Chief Creative Officer  
IDEO



As a Partner and Chief Creative Officer at IDEO, Brendan's passion is promoting entrepreneurial thinking (and entrepreneurial doing) throughout IDEO's eight global offices. With a background in engineering and design, he founded Skyline, a toy invention company acquired by IDEO and now the firm's Toy Lab. Brendan's experience includes the invention and licensing of over 150 toys and consumer products. He is a Consulting Assistant Professor at Stanford's d.School where he teaches a class he created called “From Play to Innovation”. He also sits on the board of the National Institute for Play. Brendan holds an MS from the Joint Program for Design at Stanford, as well as a BS in Mechanical Engineering from Michigan State.

3:15 – 3:45

**Coffee & Networking Break**

3:45 – 4:30

**General Session**

**MANAGING THE INTERNAL/EXTERNAL INNOVATION ROADMAP**

**Trond Unneland**

Vice President & Managing Executive  
Chevron Technology Venture Investments  
Chevron

**Mat Hans**

Director  
Motorola Applied Research  
Motorola

**Corina Kuiper**

Sr. Director  
Philips CTO Office

**Tom Halle**

Vice President, Channels & Alliances  
Hitachi ID Systems, Inc.

**Moderator:**

**Peter Skarzynski**, Chief Executive Officer and Founding Director, Strategos

4:30 -5:15

**General Session**

**THE ENTREPRENEUR'S ROLE IN INNOVATION**

Seasoned CEO's leading successful PE-backed companies will provide insight on how they are working with leading corporate development group to enhance innovation and intellectual property. Through providing case study illustrations, these individuals will display the processes and models of collaboration used cultivate and nurture leading-edge technology.

**Moderator:**

**Spencer Tall**

Managing Director  
Allegis Capital

**Scott Weiss**

Former CEO  
IronPort

**Doug Donzelli**

CEO  
Apprion

**Cary Rosenzweig**

CEO  
IMVU

5:15 - 7:00

**Cocktail Reception**

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**Thursday, February 25, 2010**



8:00 – 8:45 am

**Continental Breakfast & Networking**

9:00 – 11:00

**One-On-One Attendee Meetings**

11:00 am

**Conference Adjourns**