<table>
<thead>
<tr>
<th>Schedule</th>
<th>Session Title</th>
<th>Presenters</th>
<th>Moderator (MGI)</th>
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<tr>
<td>12:00 p.m. – 12:15 p.m.</td>
<td>Registration and Lunch</td>
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<tr>
<td>12:15 p.m. – 1:00 p.m.</td>
<td>Welcome</td>
<td>Igor Stenmark, Managing Director, MGI Research</td>
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<tr>
<td>1:00 p.m. – 1:30 p.m.</td>
<td><strong>Keynote Presentation: MGI Scenario</strong> – Billing: From Business Barrier to Key Enabler</td>
<td>Andrew M. Dailey, Managing Director, MGI Research</td>
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<tr>
<td>1:30 p.m. – 2:00 p.m.</td>
<td><strong>Case Study</strong>: Delivering Billing-as-a Service at Scale</td>
<td>Arvind Komarla, Director of Technology – Global Billing and Payment, eBay</td>
<td>Igor Stenmark</td>
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<tr>
<td>2:00 p.m. – 2:10 p.m.</td>
<td>Networking Break</td>
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<tr>
<td>2:10 p.m. – 2:40 p.m.</td>
<td><strong>Case Study</strong>: Evaluating Agile Billing Solutions</td>
<td>Dawn Marie Couch, Senior Manager Financial Systems, OpenTable</td>
<td>Jim Mendelson</td>
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<tr>
<td>2:40 p.m. – 3:10 p.m.</td>
<td><strong>Case Study</strong>: Making the Customer Engagement + Billing Connection</td>
<td>Bob Feghali, CIO and formerly head of Digital Services Pitney Bowes</td>
<td>Andrew Dailey</td>
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<tr>
<td>3:10 p.m. – 3:20 p.m.</td>
<td>Networking Break</td>
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<tr>
<td>3:20 p.m. – 3:50 p.m.</td>
<td><strong>Case Study</strong>: Building Scalable, Integrated Monetization Teams</td>
<td>Jesse Mar Chun, IT Manager, Product, Pricing &amp; Monetization, Concur Technologies</td>
<td>Igor Stenmark</td>
</tr>
<tr>
<td>3:50 p.m. – 4:20 p.m.</td>
<td><strong>Case Study</strong>: Subscription vs. Traditional Billing: Managing the co-Existence.</td>
<td>Sanjay Gupta, Sr. IT Director, Enterprise Development, NeoPost</td>
<td>Jim Mendelson</td>
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<tr>
<td>4:20 p.m. – 4:30 p.m.</td>
<td>Networking Break</td>
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<tr>
<td>4:30 p.m. – 5:30 p.m.</td>
<td><strong>Panel Discussion</strong>: Success Strategies, Best Practices and Practical Billing Insights</td>
<td>Peter Chase, Founder of Scribe Software, Ted Wiethop, CFO of Adeptia, Frank Jones, Executive Director of Operations at Kaplan as well as executives from eBay, OpenTable and others discuss challenges and strategies facing As-a-Services companies as well as firm going through a business model transformation.</td>
<td>Andrew Dailey</td>
</tr>
<tr>
<td>5:30 p.m. – 5:35 p.m.</td>
<td>Closing Remarks</td>
<td>Jim Mendelson, Managing Director, MGI Research</td>
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<tr>
<td>5:35 p.m. – 7:00 p.m.</td>
<td>Networking Cocktail Reception</td>
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AGENDA
2014 Billing Innovators Summit EAST
MGI Research Case Study Conference

CONFERENCE HOST

The conference is organized and hosted by MGI Research, an independent analyst firm focused on disruptive trends in the technology industry and well known for its in-depth coverage of billing systems solutions. Founded in 2008, MGI Research provides business executives and technology users with comprehensive research and supplier ratings, enabling organizations to make timely, informed purchasing and implementation decisions. With hundreds of interactions with users, a rigorous research methodology, MGI 360 Ratings and analysis of over 35 vendors MGI Research is uniquely positioned to help users; vendors and investors make more informed decisions.

MGI Research Billing Solutions Focus
The billing solutions industry is undergoing a fundamental shift as a new generation of billing vendors takes advantage of contemporary technologies and threatens to displace aging legacy solutions. With hundreds of interactions with users, a rigorous research methodology, MGI 360 Ratings and analysis of over 35 vendors MGI Research is uniquely positioned to help users; vendors and investors make more informed decisions. Our research covers key billing solutions market segments such as simple recurring billing; ecommerce; subscription; complex enterprise; and telecoms/utilities customer support platforms.

MGI Research Billing Solutions Vendor Coverage (partial list):

- Accumulus
- Amdocs
- Aria Systems
- AsiaInfo-Linkage
- Avangate
- Chargify
- Cleverbridge
- Comverse
- CSGI
- Cycle30
- Digital River
- Ericsson
- FuseBill
- Magnaquest
- MetraTech
- Monexa
- NetCracker
- NetSuite
- Oracle
- Orga Systems
- Recurlry
- RedKnee
- RevChain
- Revstream
- SAP
- TechnoTree
- Transverse
- Vindicia
- Zuora

RECENT RESEARCH ON BILLING SOLUTIONS

- Billing Solutions Buyers Guide Part I: Agility
- Billing Systems Selections: Key Issues and Common Mistakes
- Top Ten Trends in Billing Software Solutions

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Headquartered in Waldorf, Germany, with locations in more than 130 countries, SAP SE (NYSE: SAP) is the world leader in enterprise software and software-related services. SAP Billing and Revenue Innovation Management (BRIM), provides high-volume customers with a real-time billing capability integrated with financial modules and real-time analytics and simulation.

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Zuora is the global leader in Relationship Business Management (RBM) solutions, helping companies in every industry transition to the Subscription Economy. Enterprise leaders and high-growth companies alike use Zuora's multi-tenant cloud platform to launch, scale, and monetize their recurring revenue services. Zuora's customers include Informatica, Tata Communications, Box, Xplornet, Ustream, and Reed Business Information. www.zuora.com

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Fusebill simplifies subscription and billing management by automating manual accounting workflows and financial processes. The cloud-based platform gives companies the freedom to grow their businesses, the flexibility to capitalize on new product opportunities, and the agility to maintain a competitive edge.

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2014 Billing Innovators Summit EAST
MGI Research Case Study Conference

October 23rd, 2014
12:00pm – 6:30pm PDT
The New York Academy of Sciences
250 Greenwich Street, 40th Floor
New York, NY 10007

SPEAKER BIOS (additional bios forthcoming)

Andrew Dailey
Managing Director
MGI Research

Andrew Dailey is a Managing Director of MGI Research. Mr. Dailey has over twenty years of diversified technology and financial services experience. Prior to MGI Research, Dailey was a partner at the Jetstream Group, a management consulting firm advising Fortune 500 CIOs on software procurement negotiations, enterprise applications strategies and outsourcing/offshoring strategies. In this role, Mr. Dailey advised clients such as British Petroleum, Applied Materials, JPMorgan Chase, McDonald's, McKesson, Nissan, Sun Microsystems, and Tetra Pak. Prior to that, Mr. Dailey was the Senior Vice President of Marketing for Baan Company. Mr. Dailey spent eight years at Gartner Group, where he co-founded the Software Asset Management practice, and launched the ERP and supply chain management advisory businesses in Europe. Mr. Dailey is the author of numerous industry research papers and has lectured at the University of Chicago Graduate School of Business, UCLA's Anderson School of Management, and The Charles University, Prague. Mr. Dailey is currently the Lead Director for Project Bandaloop, a San Francisco-based aerial dance company. A four-time NCAA All-American in tennis, Mr. Dailey holds a BA degree from Swarthmore College.

Igor Stenmark
Managing Director
MGI Research

Igor Stenmark is a Managing Director of MGI Research. Mr. Stenmark's background encompasses nearly 30 years in entrepreneurial, strategic, investment and executive roles in the technology industry. Prior to co-founding MGI Research, Igor was in private practice as a strategist and counsel advising technology industry investors and executives, helping enter new markets, optimize positioning, create value and achieve liquidity. Between 1992 and 2001 Mr. Stenmark served as the Head of Gartner's Enterprise Systems Research Group. Prior to Gartner, Mr. Stenmark was the co-founder of Spectrum Concepts Software (acquired by Legent/CA) where he led held key executive positions in product development, corporate development, international sales and marketing. During the mid-80s, Mr. Stenmark worked as a communications software consultant in the energy industry and acted as a lead developer and project manager of several international projects at Mobil (now ExxonMobil). Mr. Stenmark holds Bachelor degrees in Electrical Engineering and Computer Science from Cooper Union School of Engineering and New York University respectively.

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Jim Mendelson is a Managing Director of MGI Research. Prior to co-founding MGI Research with Messrs. Stenmark and Dailey, Jim was a leading Wall Street enterprise software analyst. Starting out on Wall Street in the late 1970s, Jim has covered a broad range of software companies in a variety of different information technology sectors. Jim was the lead enterprise software analyst at firms such as Morgan Stanley, Soundview Technology Group, Charles Schwab and Lazard. During his career as an analyst on Wall Street, Jim was highly ranked by Institutional Investor, as well as by Reuters and Greenwich Research polls. Jim has a Bachelor’s Degree in Economics and English from Bucknell University, and an MBA in Finance from New York University.

Arvind Komarla is the key architect of eBay’s global Billing and Payments as a Service (BaaS) and oversees a global technology platform which funnels billions of dollars in payments from eBay Marketplaces, PayPal Merchant Services and several other eBay companies, such as Half.com, WHI, and Tradera. He is a recognized technology leader with over 20 years of experience and strategic achievements in business technology development, global team building and operational improvement. Arvind is currently the director of technology & production for the global billing and payment group at eBay. Prior to eBay, Arvind held executive and senior level technical positions at companies such as netSpend, BMC Software, BSA and others. Previously, he built a successful consulting company with clients such as IBM, GE, AT&T and Brown & Williamson. Arvind holds a Bachelors and a Masters in Electrical & Computer Engineering and maintains PMP, CSM (Scrum Master), ITIL and Six Sigma Green Belt certifications. Arvind lives in Austin with his wife Shalini and two beautiful children Riya and Krish. When Arvind is not working, he nurtures his passion for technology and cars. In addition, he also loves to read and travel with his family.

Jesse Mar Chun joined Concur in 2008 and was instrumental in the Quote-to-Cash program implementation at Concur - leading the billing system replacement. Prior to Concur, Mr. Mar Chun was an Assistant VP at Washington Mutual in the community and External Affairs group and previously was a project manager in corporate finance. Jesse holds a PMP certification and has graduated cum laude from Willamette University with a BA in international studies. He enjoys travelling and is 20.9 degrees from completing the longitude challenge (missing 82.9 E to 103.8 E). Jesse, who is married to a chef-instructor and loves culinary experiences, is still unable to get his 4-year old to eat vegetables with the exception of carrots in soup.

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Dawn Marie Couch is a senior finance professional with a specialty and an in-depth experience in planning and implementing technology for financial systems. Dawn has recently led an evaluation and selection process for an Agile Billing solution at OpenTable. Prior to OpenTable has held finance management positions at several Silicon Valley technology leaders such as Adobe, PeopleSoft, VMware, Polycom and Maxim Integrated Products. Dawn holds a degree in Accounting and Economics from the University of San Francisco.

Peter Chase founded Scribe along with Jim Clarke in the beginning of 1996. As Executive Vice President, Business Development, Peter is responsible for establishing and growing partnerships with other leading technology companies in support of Scribe’s overall market and product strategy. Prior to founding Scribe, Peter held senior positions in sales, product marketing, and finance at SNAP Software, an early pioneer in CRM software that was acquired by Dun and Bradstreet. Prior to SNAP, Peter was the Chief Financial Officer for Software Services of America, a publicly-held software provider for the banking industry. Peter is a recognized expert in both the CRM and Integration software industries. He has published numerous articles and whitepapers and is a frequent speaker and panelist at industry events. Peter holds a Master of Business Administration and a Bachelor of Science Degree in Accounting and Computer Science at Southern New Hampshire University.

While at Pitney Bowes between 2009 and 2014, Bob Feghali has been integrally involved in the launch of a series of digital products focused on serving the communications, marketing and growth needs for small businesses and consumers globally. Prior to joining Pitney Bowes, Bob served as the CIO at SpaFinder where he led key business initiatives and deployment of new ecommerce platforms. Prior to SpaFinder, Bob served as the vice president of business development and the CIO for the American National Standards Institute (ANSI) leading re-engineering efforts and building e-commerce operations, positioning it as a key provider for code, standards, and regulations. While at ANSI, Bob launched the first search engine for standards in 1997 and the first online store with a self-serve and subscription model. During his 11 years at ANSI, Bob was also a member of the Information Technology Strategy Implementation Group of the International Organization for Standardization (ISO), and chaired the group from 2002-2006.
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Sanjay Gupta
Senior IT Director
Enterprise Development
Neopost USA

Sanjay Gupta is a Senior IT Director of Enterprise Development for Neopost USA, a nearly 100 year old global leader in business solutions for the postal, parcel delivery and related digital businesses. Neopost has a worldwide presence with subsidiaries in 29 countries and serves over 800,000 business customers around the world. Sanjay has over 18 year of industry experience in billing on various platforms and business areas. Prior to Neopost Sanjay has held several senior level technology management positions with companies such as Hasler, Inc., Compuware, HCL, Fujitsu. Sanjay holds an undergraduate degree in Electrical Engineering and an MBA in IT and Finance from University of Connecticut.

Frank Jones
Executive Director
Operations
Kaplan Test Prep

Frank Jones is the Executive Director of Operations at Kaplan Test Prep, the global leader in the test prep industry with over 3 million students and 3,000 classroom locations worldwide. At Kaplan, Frank leads management of day-to-day operational policies and objectives. Frank has direct responsibility for maintaining operational readiness and compliance for key elements of the current suite of business critical systems and evaluation of new financial systems solutions. Frank has recently been involved in implementation of several SOX and PCI compliance initiatives and has spearheaded the modernization and reorganization of several key financial systems.

Ted Wiethop
CFO of Adeptia

Ted Wiethop is the CFO and COO of Adeptia Inc., a Chicago-based data integration technology company. Prior to joining the Adeptia team, Ted served as Vice President of Customer Financial Operations at SAVVIS, Inc. where he was responsible for all customer financial matters associated with the company’s $1+ billion customer base, including credit approval, billing, accounts receivable management, collections, revenue assurance and settlement approval. Previously, Wiethop also held other roles at SAVVIS, Inc. including Vice President of Account Operations, Americas; Vice President of Financial Reporting and Accounting Operations; and, Vice President, Network Cost Management. Before joining SAVVIS, Inc. Wiethop served as CFO and Vice President of Finance at PSINet, Inc. where he led finance and accounting functions for the $600 Million North American regions of PSINet Networking and Consulting businesses.

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