

Welcome to

Captivate

Thursday, November 14, 2024

8:30am – 4:00pm

300 Mission, San Francisco, CA

Hosted by CaptivateIQ



Thursday, November 14, 2024
8:30am – 4:00pm

Captivate

A one-day-only event designed to help customers and prospects get better ROI – Return on their Incentive and planning programs.

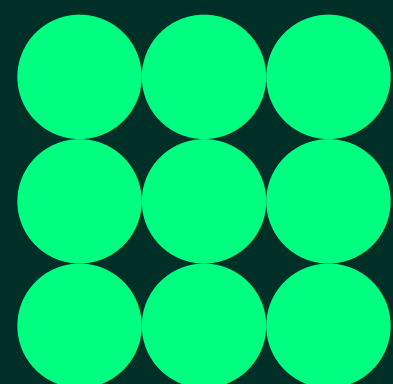
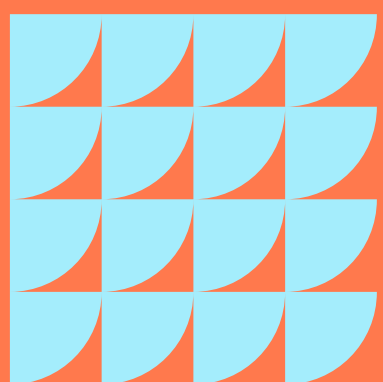
This Year's Theme:

Win in the Era of Efficient Growth

Drive revenue, efficiently. Save money, hit targets, and prepare for future business growth. Empower commission and sales planning professionals to drive the outcomes organizations need.

300 Mission, San Francisco, CA

Hosted by CaptivateIQ



Captivate

Whether you have been a CaptivateIQ customer for many years, or you're just now learning about the power of aligning incentives and compensation with the revenue outcomes your business needs, this event has something for you. Get a glimpse into the minds of commission management professionals across the country and see how they are unlocking the power that incentives and sales planning hold in driving outcomes organizations need.

The Day's Agenda

8:30am — 9:30am

Registration | Demo Stations

Keynote Sessions

9:30am — 9:35am

Welcome to Captivate!

Katie Foote, Chief Marketing Officer, CaptivateIQ

9:35am — 9:50am

Business Keynote:

Welcome to Era of Efficient Growth

Mark Schopmeyer, Co-CEO, CaptivateIQ

9:50am — 10:10am

Research Keynote: State of ICM

Conway Teng, Co-CEO, CaptivateIQ

10:10am — 11:00am

A Customer Panel: How are you Winning in the Era of Efficient Growth via Incentives

Hosted by: Mark Schopmeyer, Co-CEO, CaptivateIQ

With: Tzvetana Duffy, VP of Corporate Engineering, Planet

Prajay Khatri, Senior Manager-GTM Finance, FloQast

Alec Szczerbinski, Senior Manager, Sales Revenue Operations, DataDog

11:00am — 11:30am

Morning Networking & Refreshment Break

11:30am — 12:00pm

Technology & CIQ Product Roadmap Keynote

Nahi Ojeil, SVP EPD, CaptivateIQ

12:00pm — 12:30pm

Voice of the Customer Highlights

Hosted by: Andrew Cappiello, Director, Professional Services, CaptivateIQ

12:30pm — 1:15pm

Lunch | Solution Showcase

Breakout Sessions

1:15pm — 2:00pm

Adapting Sales Strategies Amid Change in a Dynamic Market

Brad Burnaman, Chief Executive Officer, The Blue Horizons Group LLC

1:15pm — 2:00pm

Enhancing Data Modeling: Strategies for Performant Joins and Formulas

Kori Peterson, Product Adoption Manager, CaptivateIQ

Paul Wise, Product Adoption Manager, CaptivateIQ

2:00pm — 2:30pm

Afternoon Networking & Refreshment Break

2:30pm — 3:15pm

Sales Planning Defined: The Process of Aligning Corporate Goals to Sales Territory and Quota

David Barber, Regional Vice President, OpenSymmetry

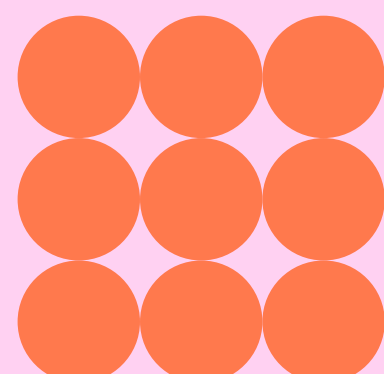
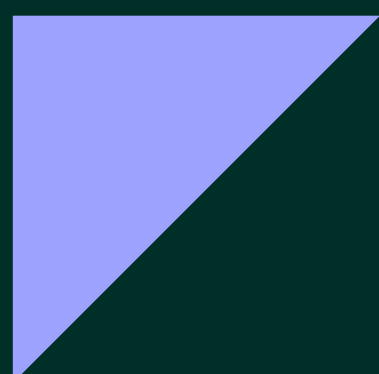
2:30pm — 3:15pm

Implementing Global Attributes in CaptivateIQ: Strategies for Effective Management

Blake Wayment, Product Adoption Manager, CaptivateIQ

3:15pm — 4:00pm

Closing Networking Drinks Reception



Captivate

Keynote Sessions

9:30am – 9:35am

Welcome to Captivate!

Katie Foote, Chief Marketing Officer, CaptivateIQ

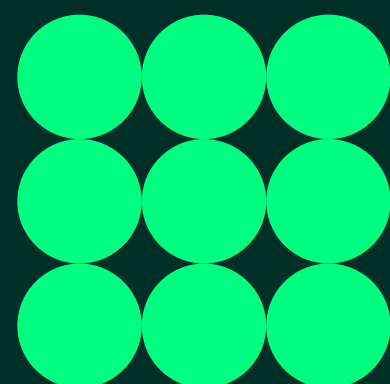
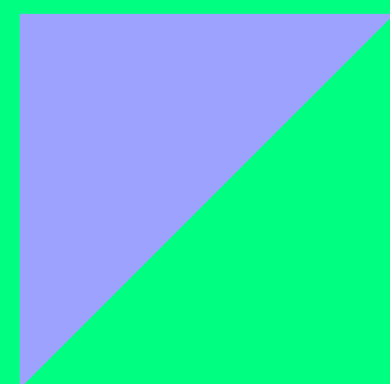
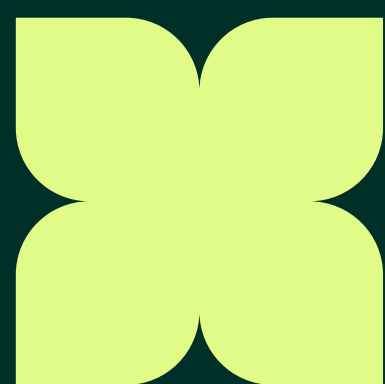
Whether you have been a CaptivateIQ customer for many years, or you're just now learning about the power of aligning incentives and compensation with the revenue outcomes your business needs, this event has something for you. Get a glimpse into the minds of commission management professionals across the country and see how they are unlocking the power that incentives and sales planning hold in driving outcomes organizations need.

9:35am – 9:50am

Business Keynote: Welcome to Era of Efficient Growth

Mark Schopmeyer, Co-CEO, CaptivateIQ

We have officially entered the Era of Efficient Growth, where the ability to optimize resources, hit revenue targets, and prepare for future growth are key ingredients for sustained business success. During our kick-off keynote, you'll get an overview of what this transition away from "growth at all costs" means for businesses today, hear about the biggest challenges leaders face as they prepare to meet each of these three mission-critical objectives, and learn how pulling two powerful-yet-underutilized levers – incentives and sales planning – helps compensation and RevOps professionals efficiently drive results.



Captivate

Keynote Sessions

9:50am – 10:10am

Research Keynote: State of ICM

Conway Teng, Co-CEO, CaptivateIQ

Learn about the biggest challenges that today's compensation teams face, plus industry-wide trends, expert insights, and real-world examples of how comp admins are working to better align incentives with objectives. Showcasing original CaptivateIQ research, this keynote will cover how to recognize the right tactical + strategic mix, ensure your program can efficiently scale, and keep a real-time pulse on program impact and process efficiency.

10:10am – 11:00am

A Customer Panel: How are you Winning in the Era of Efficient Growth via Incentives

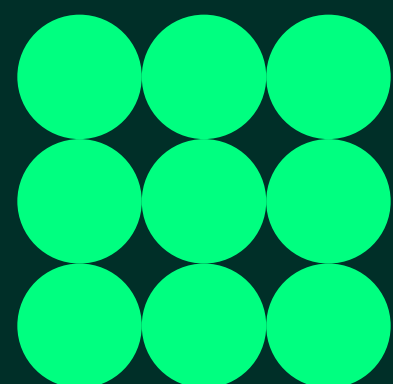
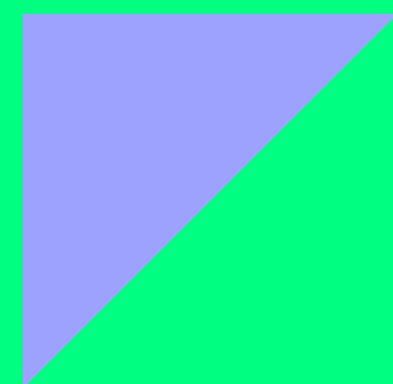
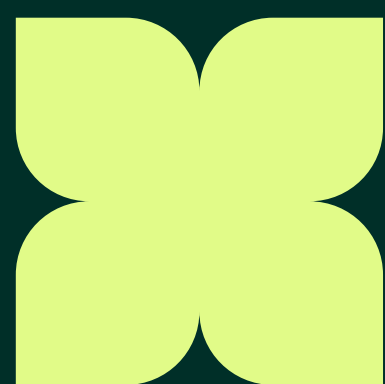
Hosted by: Mark Schopmeyer, Co-CEO, CaptivateIQ

With: Tzvetana Duffy, VP of Corporate Engineering, Planet

Prajay Khatri, Senior Manager, GTM Finance, FloQast

Alec Szczerbinski, Senior Manager, Sales Revenue Operations, DataDog

In today's fast-paced business environment, growth isn't just about expanding — it's about doing so efficiently and strategically. This panel, led by our CEO Mark Schopmeyer, brings together industry leaders in Incentive Compensation Management (ICM) and Sales Performance Management (SPM) to share how they are driving success through innovative approaches to efficiency. Through real-world examples, the panelists will discuss how they navigate challenges, leverage technology, and align their ICM strategies with broader business objectives to sustain growth without compromising on quality or speed. Whether you're an ICM veteran or exploring solutions for the first time, join us for insights into the practices, tools, and strategies that can help your organization thrive in an era of efficient growth.



Captivate

Keynote Sessions

11:30am – 12:00pm

Technology & CIQ Product Roadmap Keynote

Nahi Ojeil, SVP EPD, CaptivateIQ

In this session, we will explore CapitalizeIQ's strategic roadmap and how it empowers our customers to revolutionize commission automation. Our no-code, flexible modeling engine allows users to take control, tailoring solutions that meet their unique needs. We'll delve into the importance of real-time transparency, providing sellers with insights into their past, present, and potential earnings, which drives motivation and performance. Attendees will gain valuable insights into upcoming features and enhancements that will further enhance user experience and optimize sales strategies. Don't miss this opportunity to learn how CIQ is shaping the future of commission management.

12:00pm – 12:30pm

Voice of the Customer Highlights

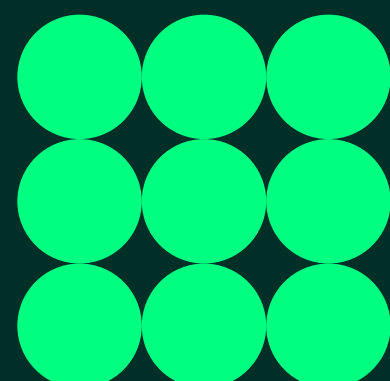
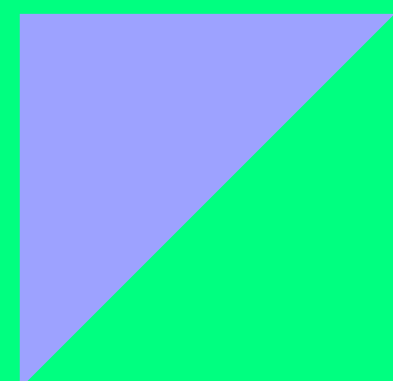
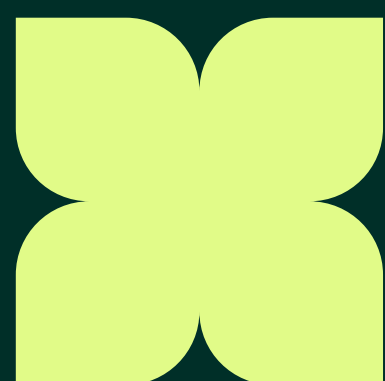
Hosted by: Andrew Cappiello, Director, Professional Services, CaptivateIQ

With Panelists: Sheila Ludard, Principal Customer Success Manager, CaptivateIQ

Allison Solin, VP, Alliances and Growth in Sales, CaptivateIQ

Paul Wise, Principal Product Adoption Manager, CaptivateIQ

Join us for an enlightening session with CapitalizeIQ's Director, Professional Services, Andrew Cappiello, focusing on the inspiring stories of our customers succeeding in the Era of Efficient Growth. We'll dive deep into how organizations are harnessing CaptivateIQ's innovative solutions to optimize commission management and drive performance. Hear about industry leaders who have streamlined their processes, improved transparency, and motivated their sales teams through our platform. This talk will highlight key customer insights and strategies that have led to measurable results, showcasing how the voice of the customer shapes our development and fuels ongoing innovation at CaptivateIQ.



Captivate

Breakout Sessions

1:15pm – 2:00pm

Adapting Sales Strategies Amid Change in a Dynamic Market

Brad Burnaman, Chief Executive Officer, The Blue Horizons Group LLC

This session is designed for business leaders and sales professionals, covering essential topics such as strategic planning, leveraging agile technologies for quick adaptability, and implementing data-driven decision-making processes. Attendees will leave with actionable insights to help navigate evolving conditions with minimal disruption, while continuously optimizing revenue in an ever-changing market.

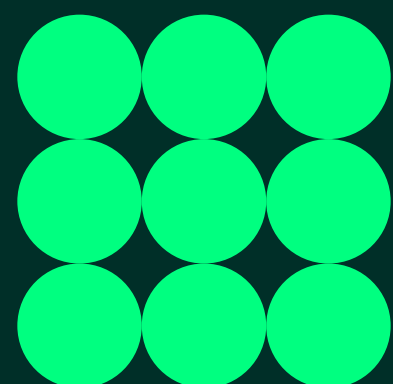
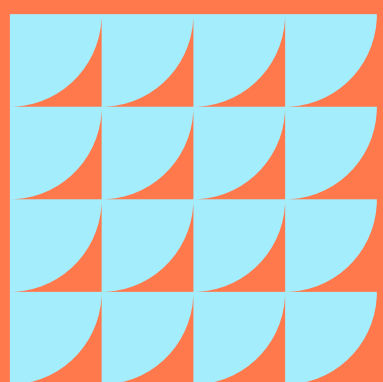
1:15pm – 2:00pm

Enhancing Data Modeling: Strategies for Performant Joins and Formulas

Kori Peterson, Product Adoption Manager, CaptivateIQ

Paul Wise, Product Adoption Manager, CaptivateIQ

This breakout session will explore advanced techniques for designing models that optimize performance through strategic joins and streamlined formulas. We will explore common pitfalls in data modeling, analyze the impact of join types and formulas on model performance, and share best practices for building performant commission plans. By the end of the session, attendees will be equipped with practical tools and methodologies to enhance their CaptivateIQ instance, ultimately driving better decision-making and insights in their organizations.



Captivate

Breakout Sessions

2:30pm – 3:15pm

Sales Planning Defined: The Process of Aligning Corporate Goals to Sales Territory and Quota

David Barber, Regional Vice President, OpenSymmetry

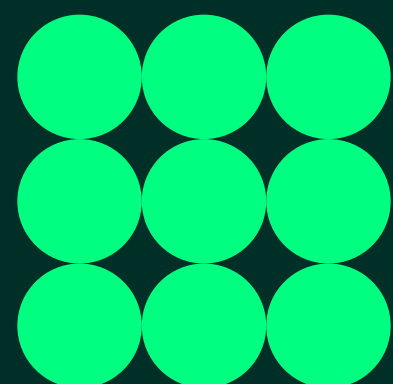
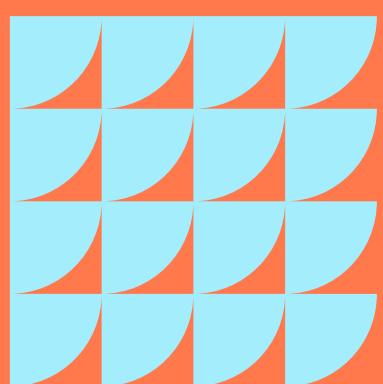
The sales planning process has many different names and is very matrixed across organizations. This creates fragmentation of the process with multiple teams doing different manual processes that constrain the organization's options for achieving growth targets. OpenSymmetry has worked to define an end-to-end process map for clients to really begin to understand where there are opportunities for improvement.

2:30pm – 3:15pm

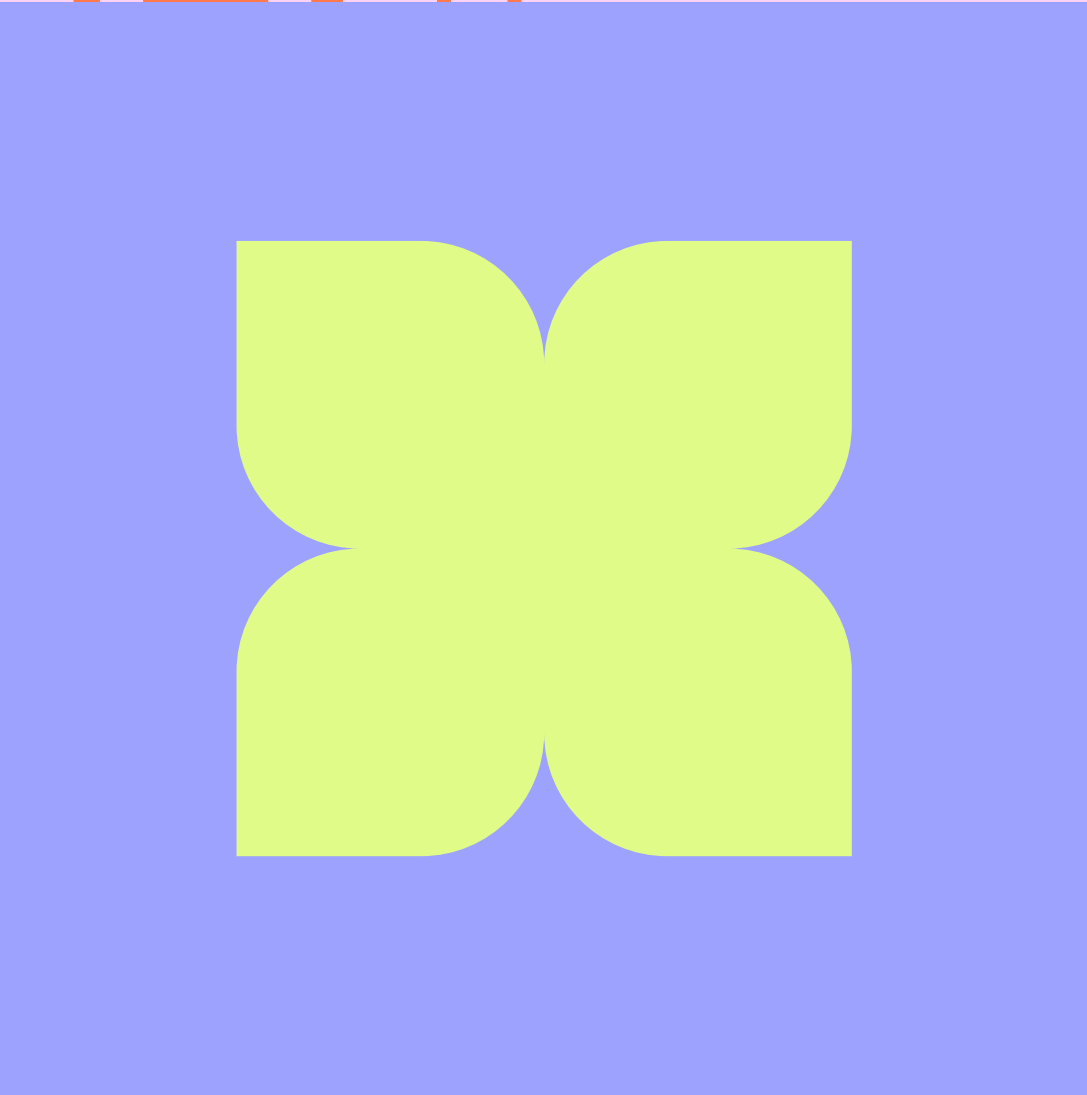
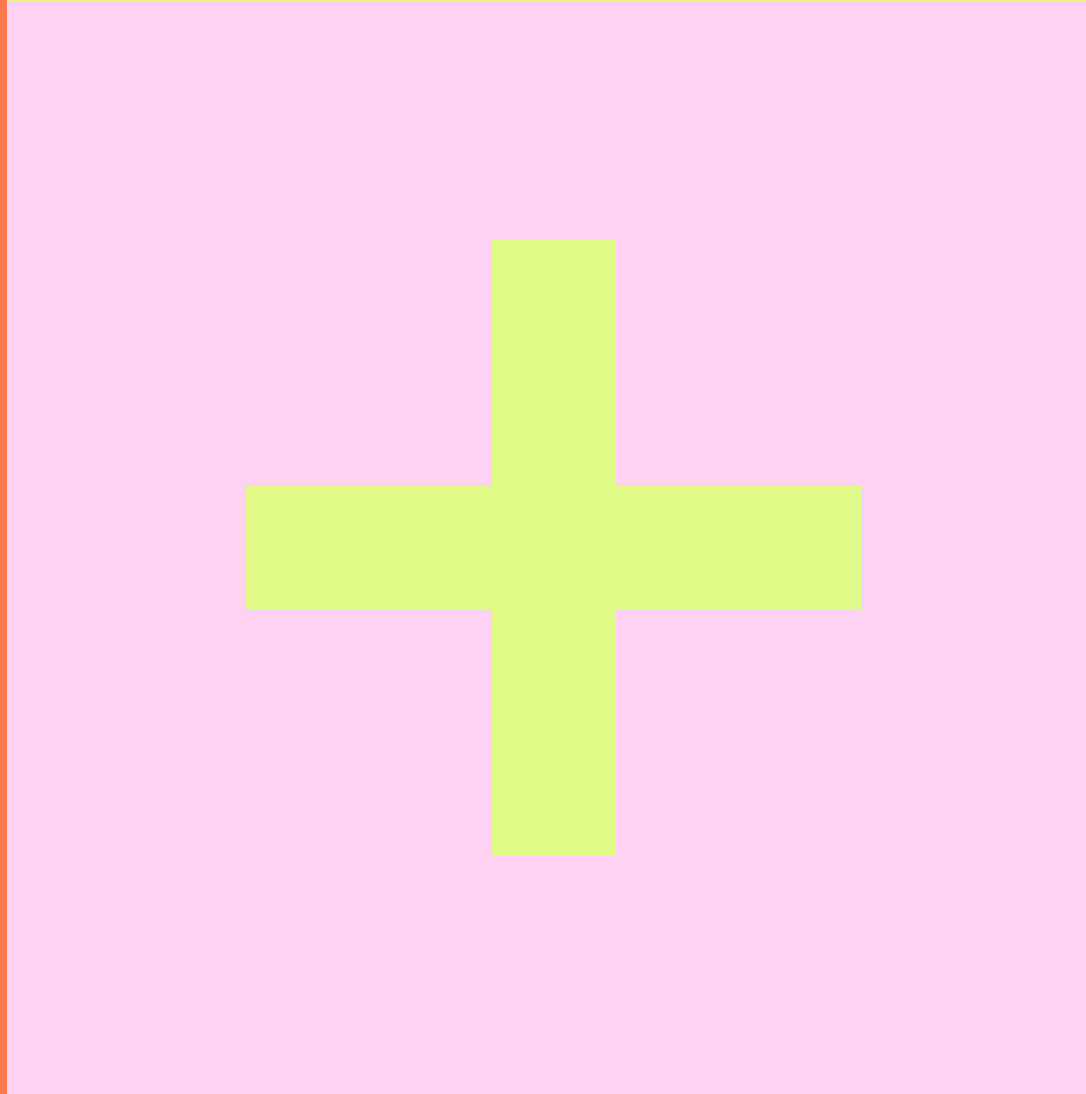
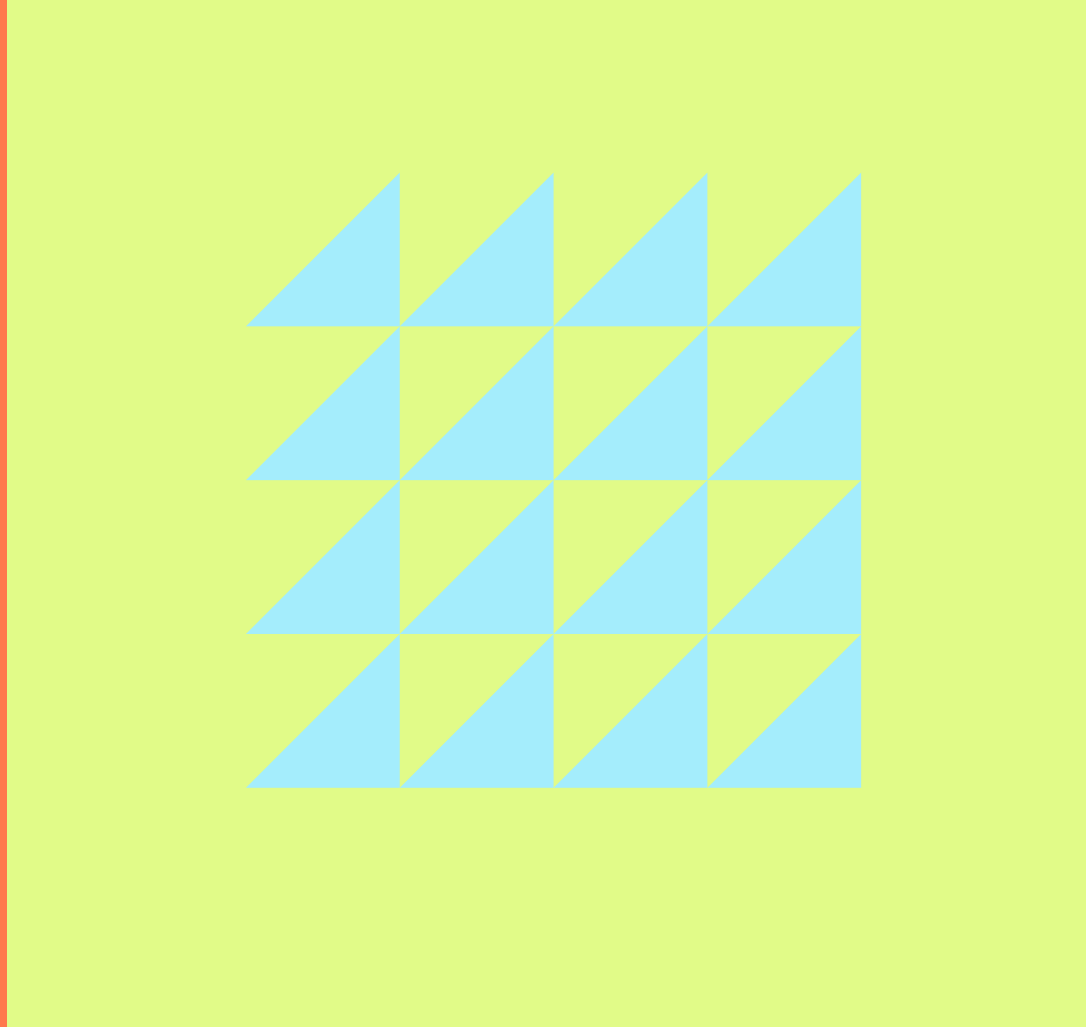
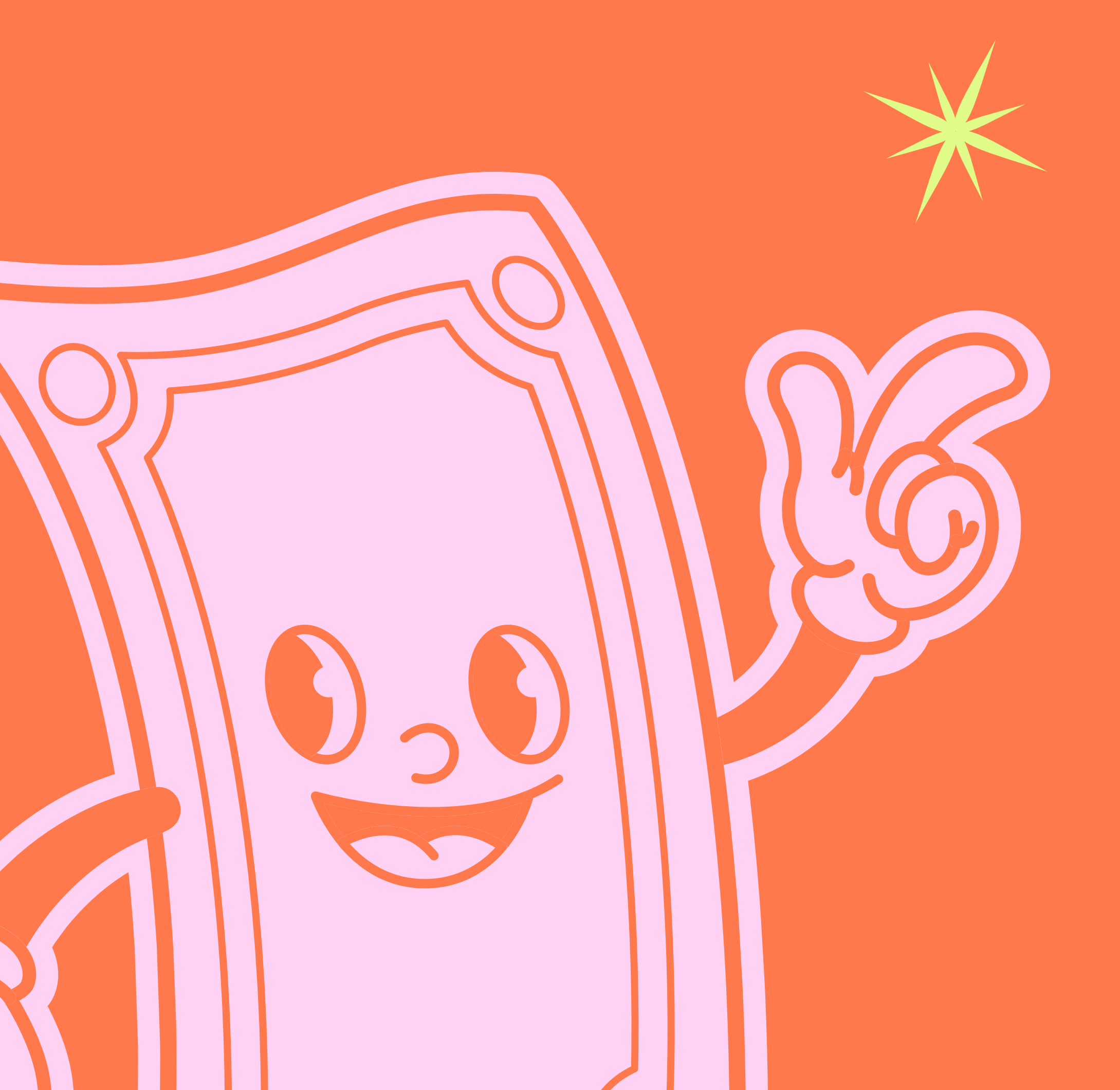
Implementing Global Attributes in CaptivateIQ: Strategies for Effective Management

Blake Wayment, Product Adoption Manager, CaptivateIQ

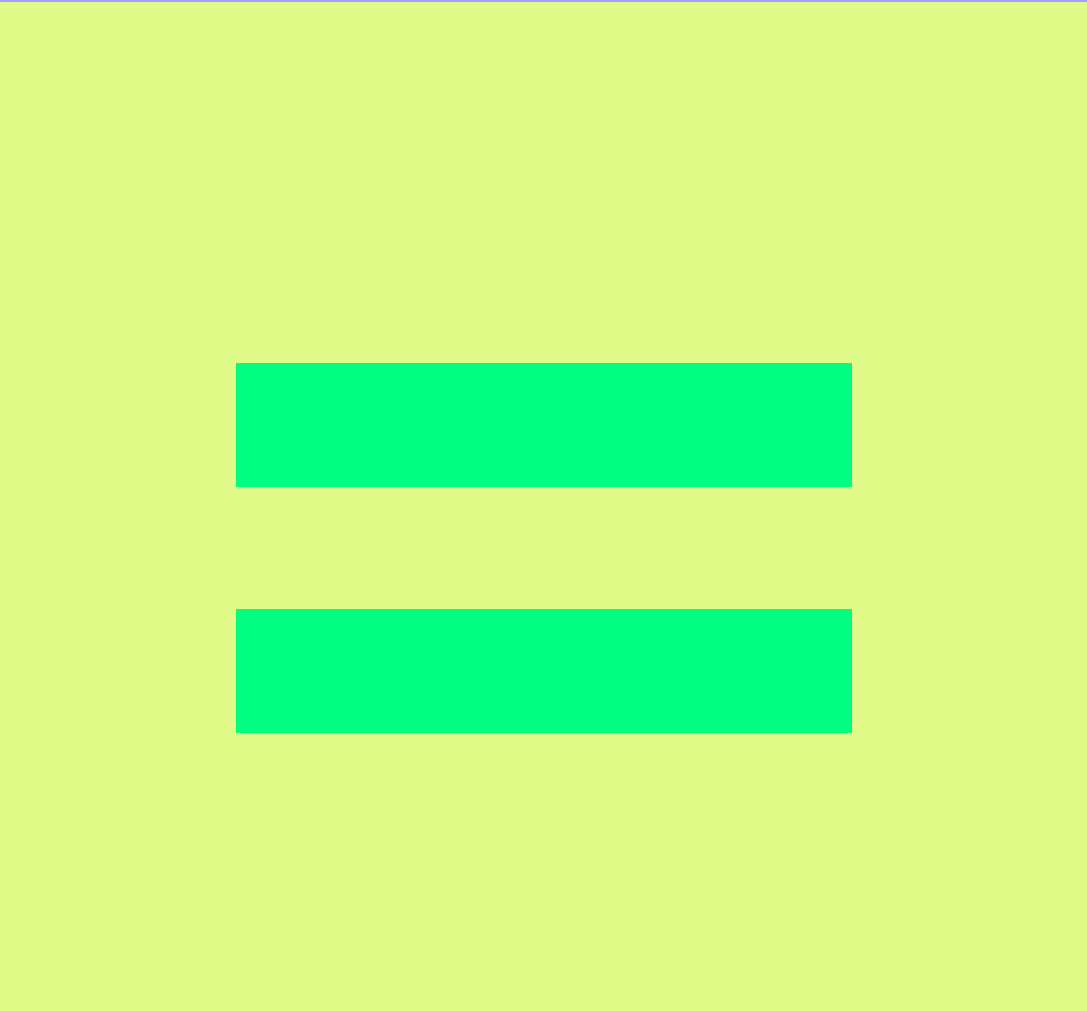
In this session, we will explore the implementation of the Global Attributes feature in CaptivateIQ, focusing on strategies for creating robust Global Attribute worksheets and managing essential processes, including data ingestion. Attendees will learn how to effectively strategize the setup of Global Attributes to enhance data consistency and accessibility across their organization. We will discuss best practices for maintaining these attributes over time, ensuring seamless integration with existing workflows. By the end of the session, participants will have actionable insights and tools to optimize their CaptivateIQ instance, fostering improved data quality and operational efficiency.



Captivate



Your CaptivateIQ Hosts & Speakers



CaptivateIQ Speaker Bios & Sessions

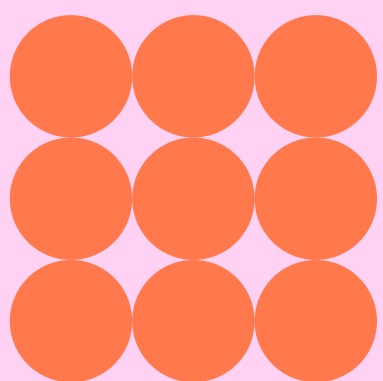


**Business Keynote: Welcome to
the Era of Efficient Growth**

Mark Schopmeyer

*Co-CEO,
CaptivateIQ*

Mark Schopmeyer is the Co-CEO and Co-Founder of CaptivateIQ, the leader in sales commission software. Under his leadership, the company has grown to over 200 employees since its founding in 2017. He learned about the gaps and opportunities in commission management while holding finance leadership positions at video advertising platform BrightRoll, where he was inspired to create a new, more strategic approach to make incentive compensation a true lever in driving activity toward core business objectives. Prior to founding CaptivateIQ, Mark was an investment professional for a growth equity firm executing investments in the software sector.



CaptivateIQ Speaker Bios & Sessions

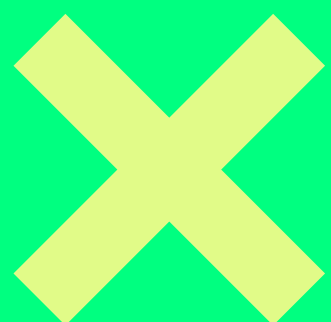
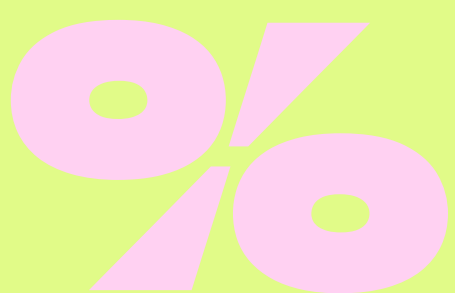
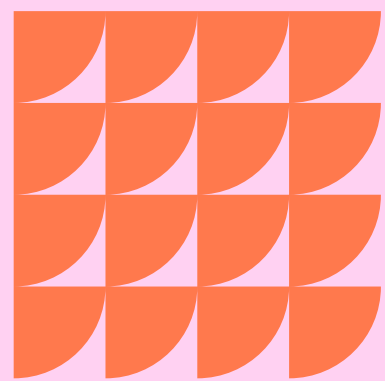
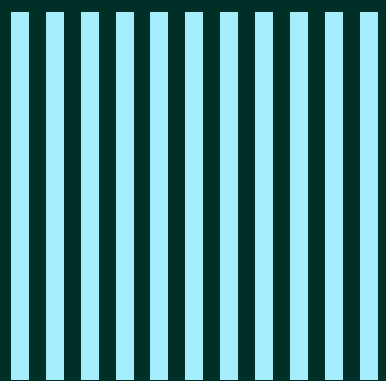


**Research Keynote:
State of ICM**

Conway Teng

*Co-CEO,
CaptivateIQ*

Conway Teng is the Co-CEO and Co-Founder of CaptivateIQ, the leader in sales commission software. Under his leadership, the company has grown to over 200 employees since its founding in 2017. Prior to founding CaptivateIQ, Conway held finance and GTM leadership positions at companies like Gusto and OrderAhead (acquired by Square), and was a consultant for McKinsey. Conway also co-founded Fivestars, a leading loyalty rewards company that has raised over \$115M by Lightspeed, Mayfield, and DCM.



CaptivateIQ Speaker Bios & Sessions

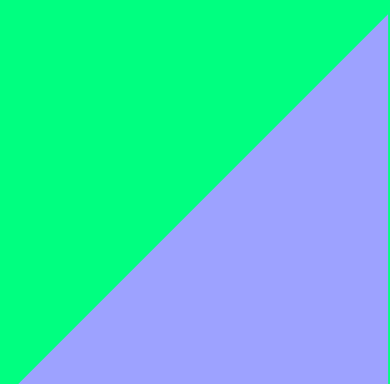
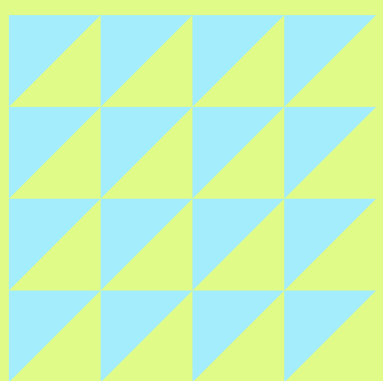


**Technology & CIQ Product
Roadmap Keynote**

**Nahi
Ojeil**

*SVPEPD,
CaptivateIQ*

As vice president of engineering, Nahi Ojeil leads the CaptivateIQ engineering team in building a unique product based on the real experiences of CaptivateIQ's customers. Nahi joined CaptivateIQ from Commure, a developer platform for healthcare, where he served as vice president of engineering. Previously, Nahi led a 150-member engineering team at Dropbox, focusing on machine learning, data and platforms, as well as product iteration and experimentation via platformization efforts.



CaptivateIQ Speaker Bios & Sessions

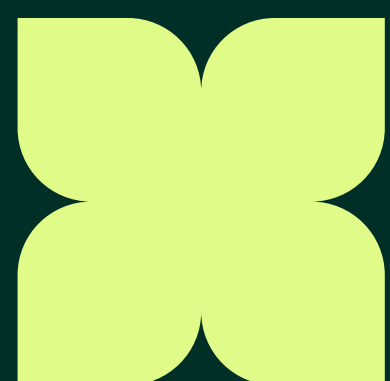
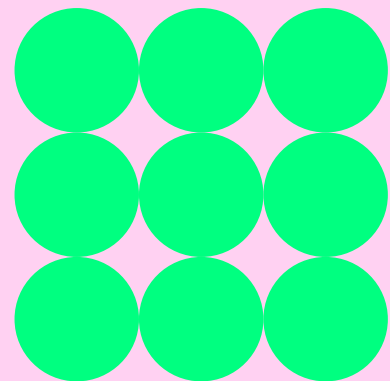
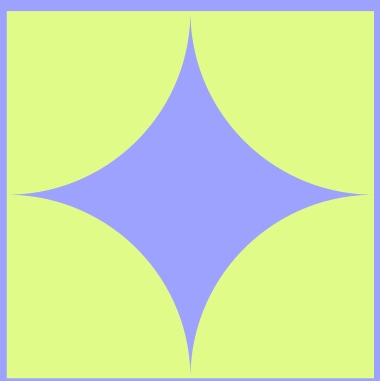


**Host: Voice of the
Customer Highlights**

Andrew Cappiello

*Director, Professional Services,
CaptivateIQ*

Andrew Cappiello currently serves as the Director of Professional Services at CaptivateIQ, where his responsibilities include oversight of customer implementations, and ongoing customer engagements with Professional Services. Andrew has over a decade of experience in the SaaS space helping multiple organizations grow and streamline their Pro Serv departments. Prior experiences include VP of Pro Serv at Sharetec Systems, and Director level roles at both WalkMe and Paycom within Professional Services.



CaptivateIQ Speaker Bios & Sessions

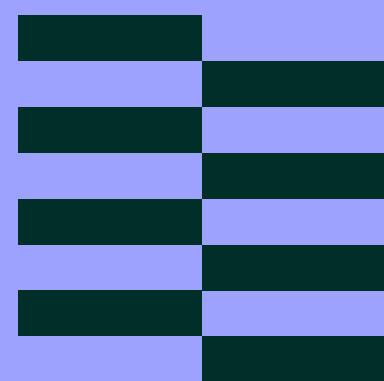
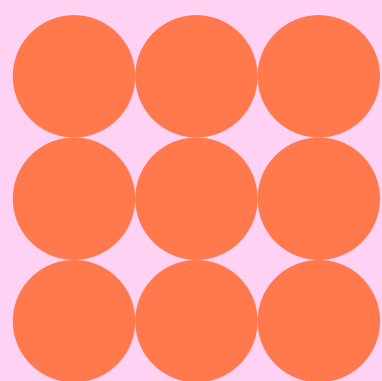


**Panel: Voice of the
Customer Highlights**

Sheila Ludard

*Principal Customer Success Manager,
CaptivateIQ*

Sheila Ludard is a Principal Customer Success Manager at CaptivateIQ, where her key responsibilities are to manage top strategic accounts and drive high-impact outcomes for customers. She has 7+ years in the tech industry, with experiences in incentive compensation, revenue operations and business development.



CaptivateIQ Speaker Bios & Sessions

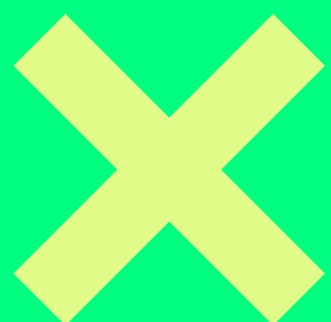
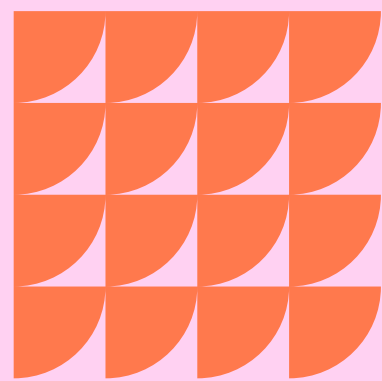
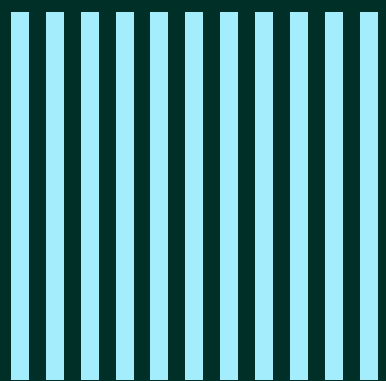


Panel: Voice of the
Customer Highlights

Allison Solin

*VP, Alliances and Growth in Sales,
CaptivateIQ*

Allison Solin is the VP, Alliances & Growth at CaptivateIQ. She brings over 20 years of SPM experience driving growth through strategic partnerships, sales acceleration, and customer success. She's led transformative programs across a range of companies, from startups to Fortune 50s, and is known for building high-performing teams and strong, trust-based relationships.



CaptivateIQ Speaker Bios & Sessions

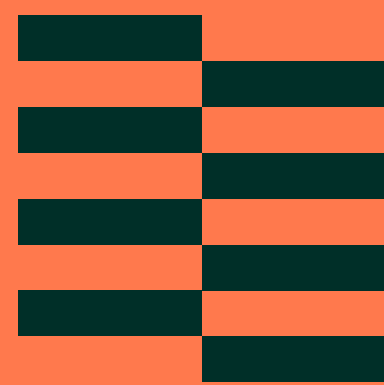
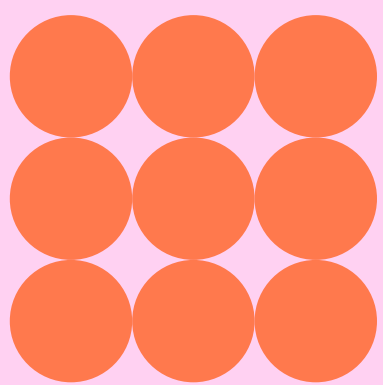


**Panel: Voice of the
Customer Highlights**

Paul Wise

*Principal Product Adoption Manager,
CaptivateIQ*

Paul Wise is a Principal Product Adoption Manager at CaptivateIQ where he specializes in enabling customers to answer their key business questions through the adoption and use of product features. Prior to CaptivateIQ, Paul managed a commissions team for a financial services firm and worked as a compensation consultant with a focus in incentive compensation.



CaptivateIQ Speaker Bios & Sessions

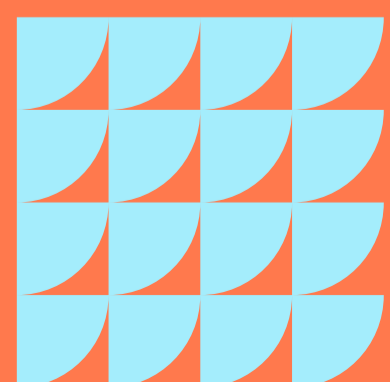
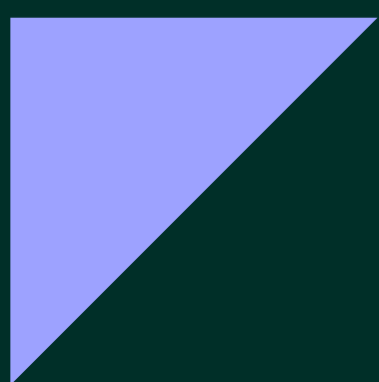


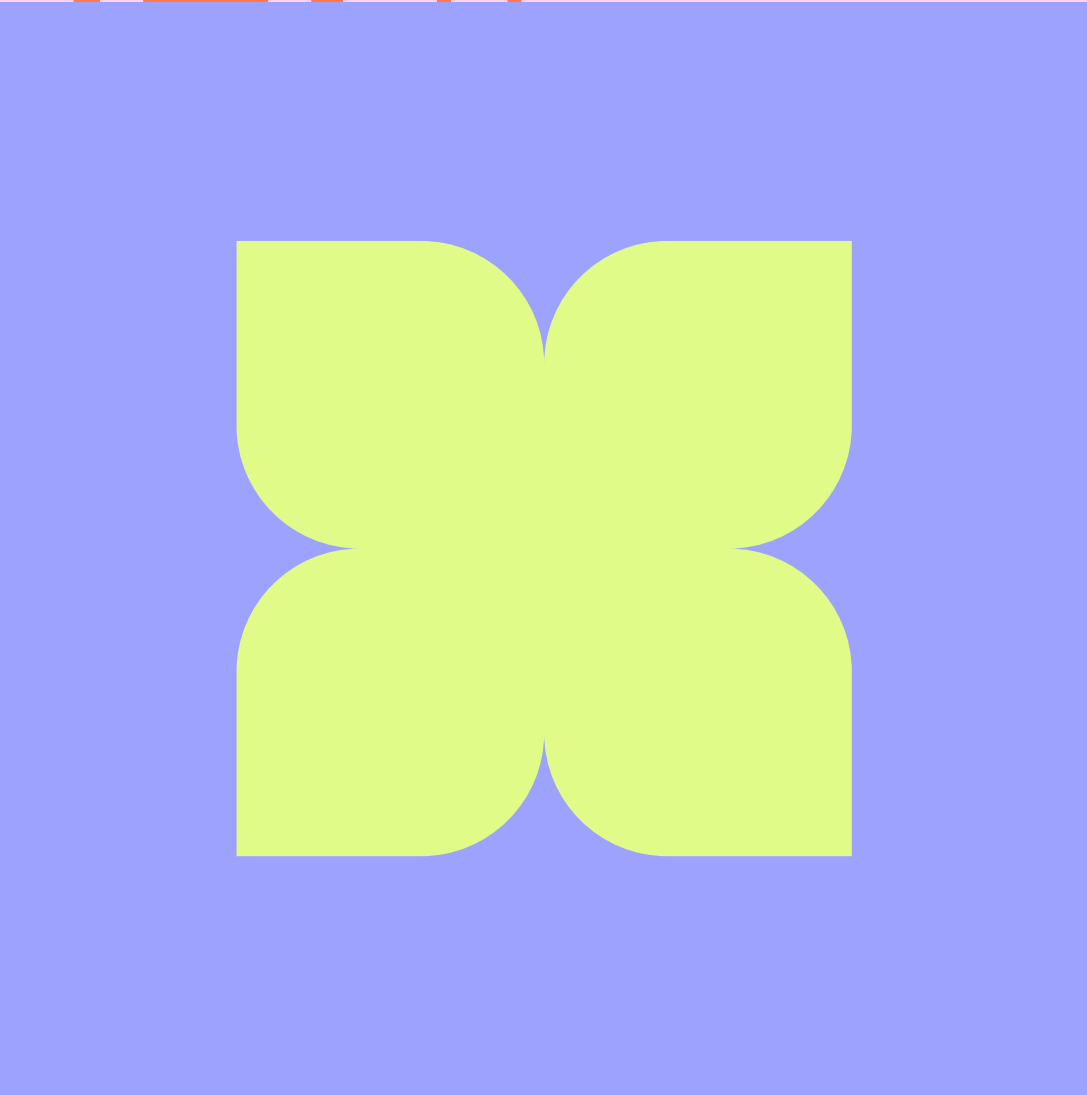
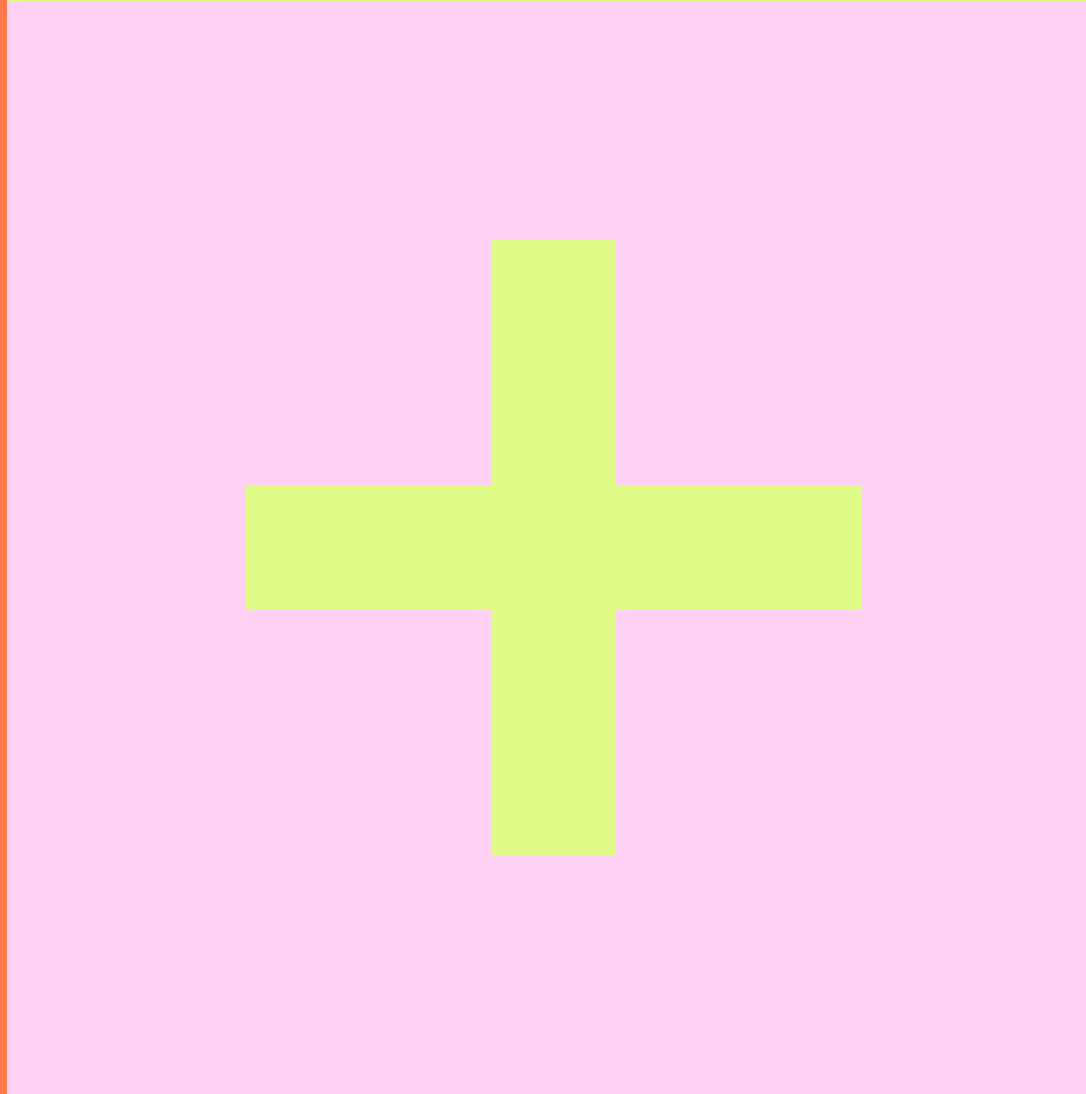
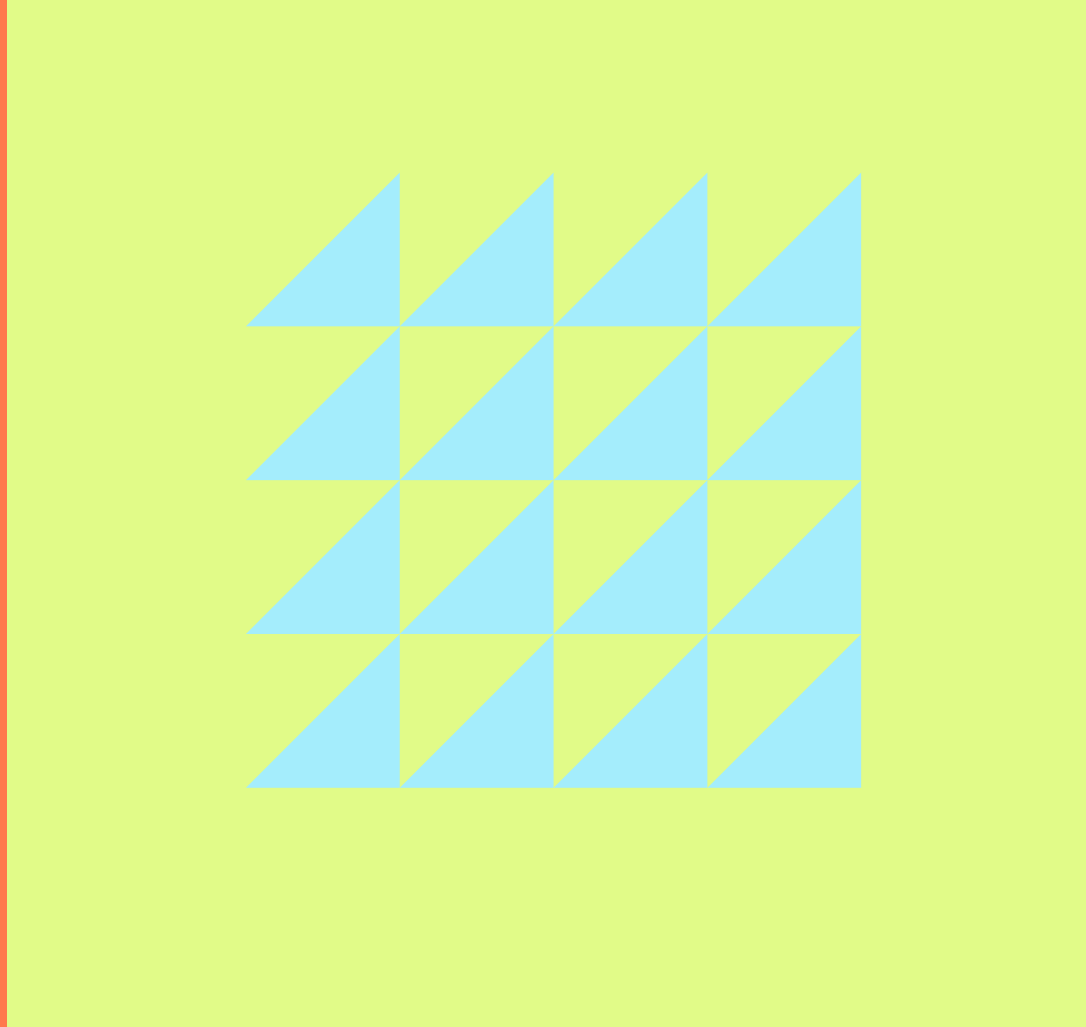
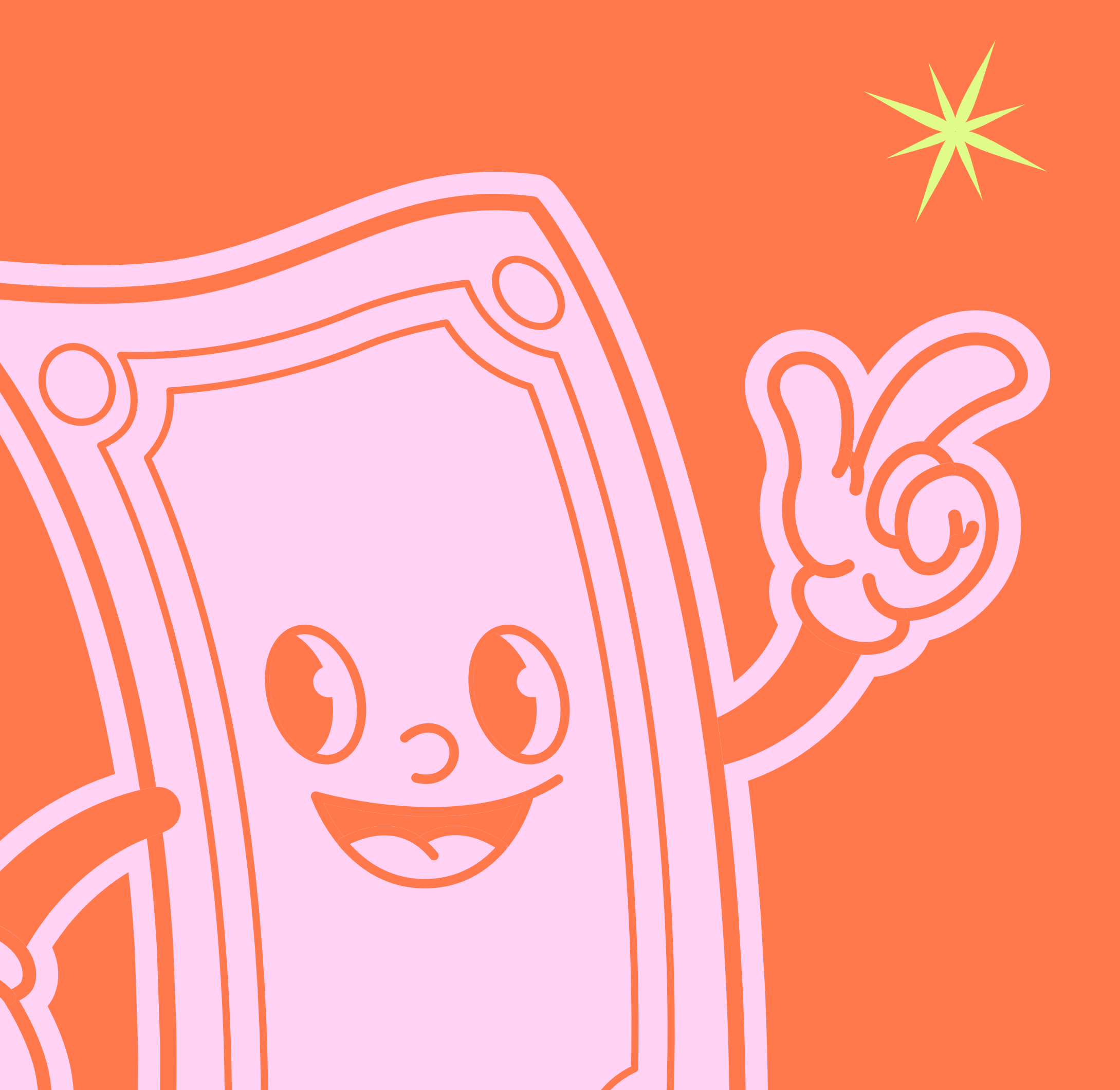
Event Emcee

Katie Foote

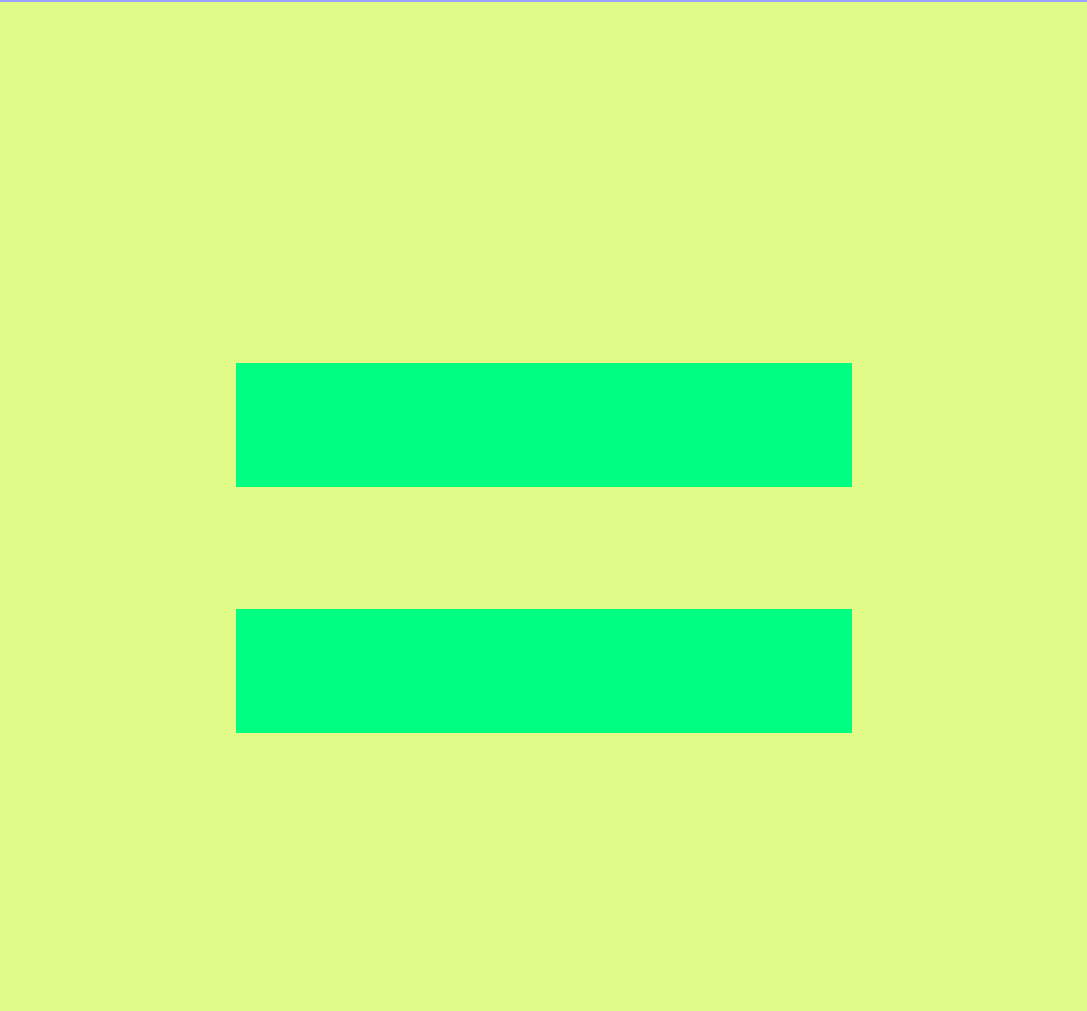
*Chief Marketing Officer,
CaptivateIQ*

Katie Foote is the Chief Marketing Officer of CaptivateIQ. With over 15 years of experience across all marketing disciplines at the world's leading SaaS companies, Katie has built her career on driving transformational change through an emphasis on relationships, momentum, and impact.





Guest Participants & Speakers





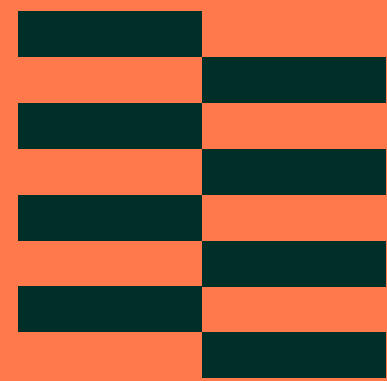
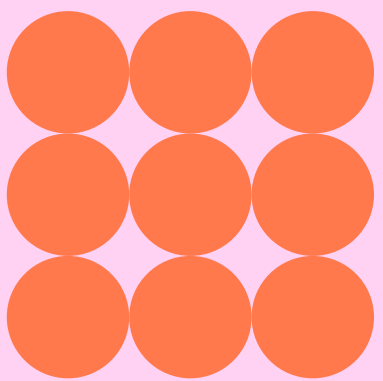
Guest Participant Bios & Sessions

**A Customer Panel: How are you
Winning in the Era of Efficient
Growth via Incentives**

Tzvetana Duffy

*VP of Corporate Engineering,
Planet*

Tzvetana Duffy is an IT executive experienced in managing global technology teams and cross functional transformation initiatives. She has 20+ years of international IT management and executive-level strategic engagement in high-growth technology companies. Tzvetana is currently leading Planet Corporate Engineering team responsible for all Planet IT Systems and Infrastructure. Her prior experiences include roles managing Enterprise Applications, Data Platforms and Enterprise Architecture in large multinational companies.



Guest Participant Bios & Sessions

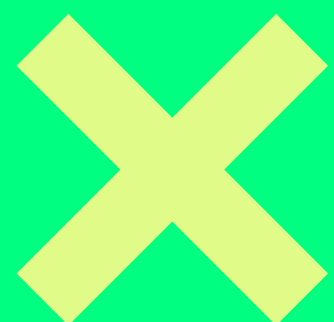
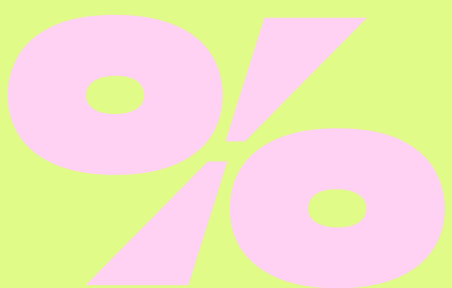
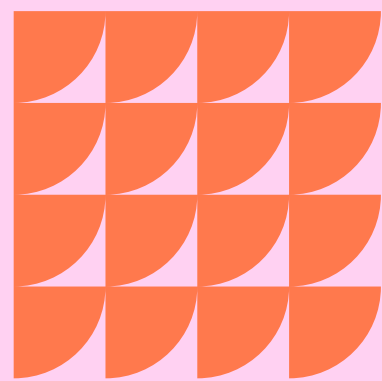
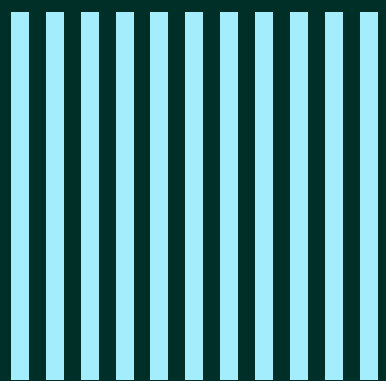


**A Customer Panel: How are you
Winning in the Era of Efficient
Growth via Incentives**

Prajay Khatri

*Senior Manager,
GTM Finance,
FloQast*

Prajay Khatri (PJ) is an experienced financial expert, with 8 years of experience in the Tech Industry. He has worked in large and small companies including Nortonlifelock (formerly Symantec), Looker Analytics, Google, and now FloQast. All of his experience is related to supporting the GTM Business units, and have helped many organizations grow.





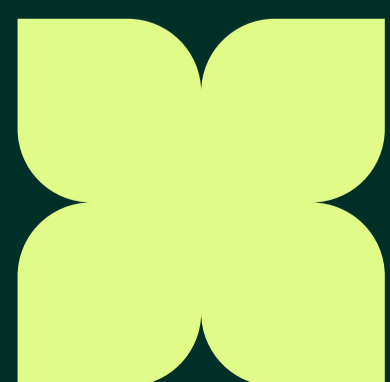
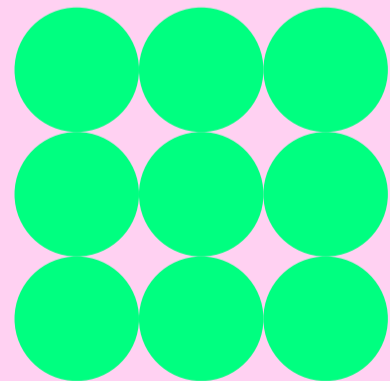
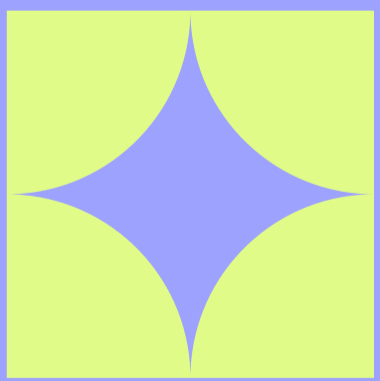
**A Customer Panel: How are you
Winning in the Era of Efficient
Growth via Incentives**

**Alec
Szczerbinski**

*Senior Manager,
Sales Revenue Operations,
DataDog*

Guest Participant Bios & Sessions

Alec Szczerbinski is a Senior Manager of Sales Revenue Operations at Datadog, specializing in incentive compensation, including commission plan design and automation. Prior to joining Datadog, Alec held roles at Movable Ink and Eaton Vance Investment Management, where he led the compensation plan design process that aligned organizational objectives with sales performance.



Guest Participant Bios & Sessions

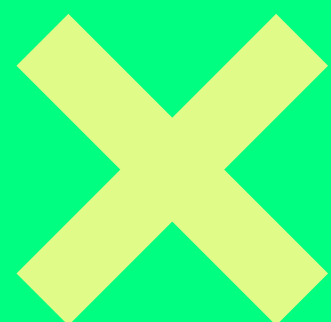
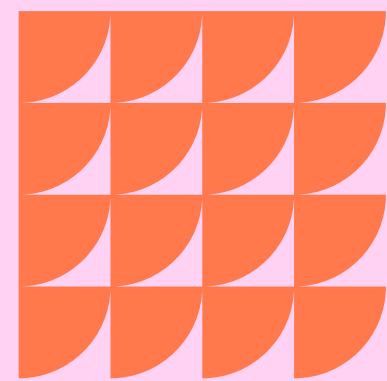
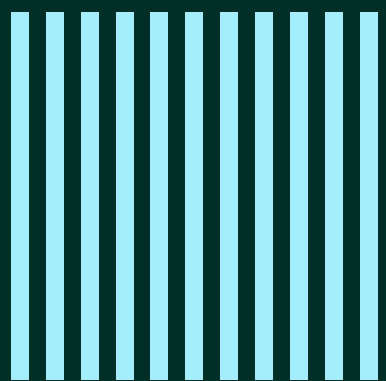


**Adapting Sales Strategies Amid
Change in a Dynamic Market**

Brad Burnaman

Chief Executive Officer,
The Blue Horizons Group LLC

Brad Burnaman is CEO and Vice President of Sales for Blue Horizons Group. He has over 20 years of experience in the Sales Performance Management space. Over the years, he has gained expertise in delivery, project management, marketing, and sales within several startups as well as industry-leading software solutions and services companies, allowing for a comprehensive understanding of the business.

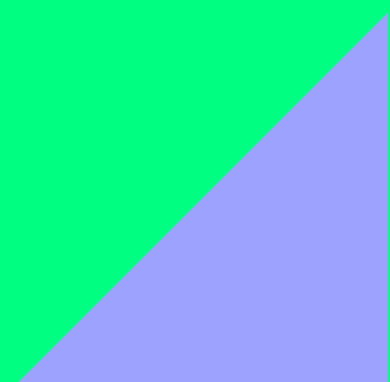
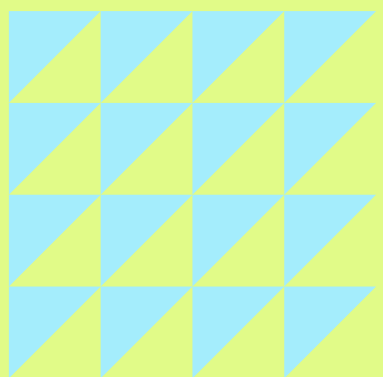




Sales Planning Defined: The Process of Aligning Corporate Goals to Sales Territory and Quota

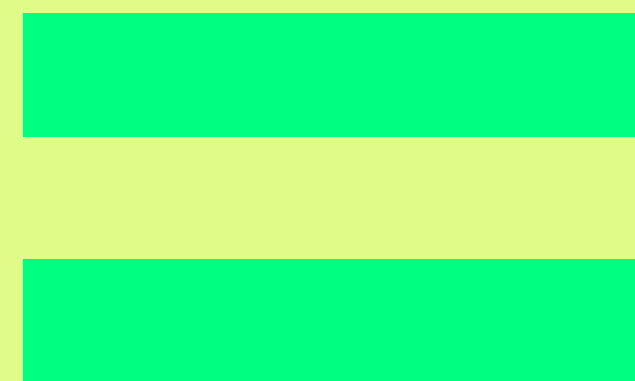
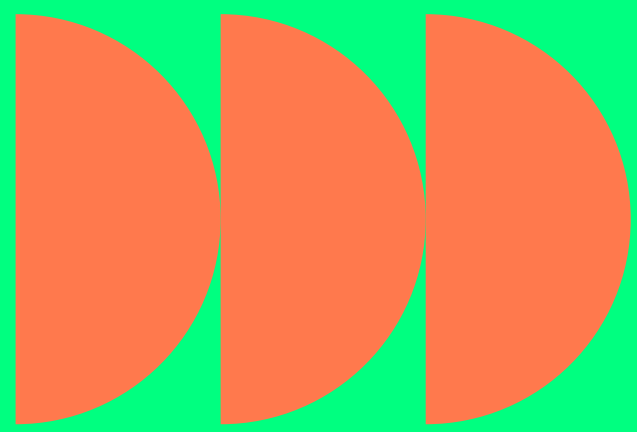
David Barber

*Regional Vice President,
OpenSymmetry*



Guest Participant Bios & Sessions

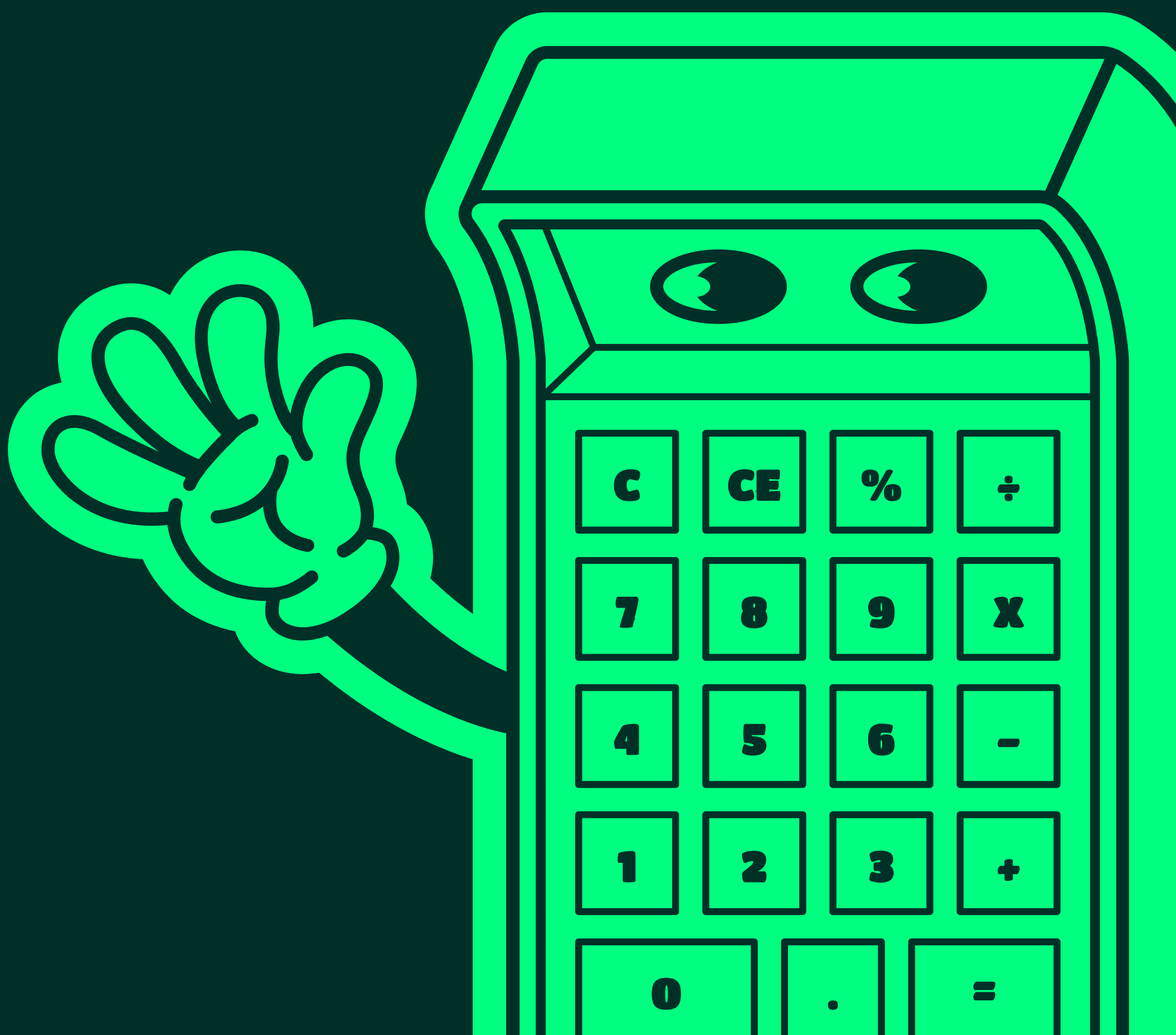
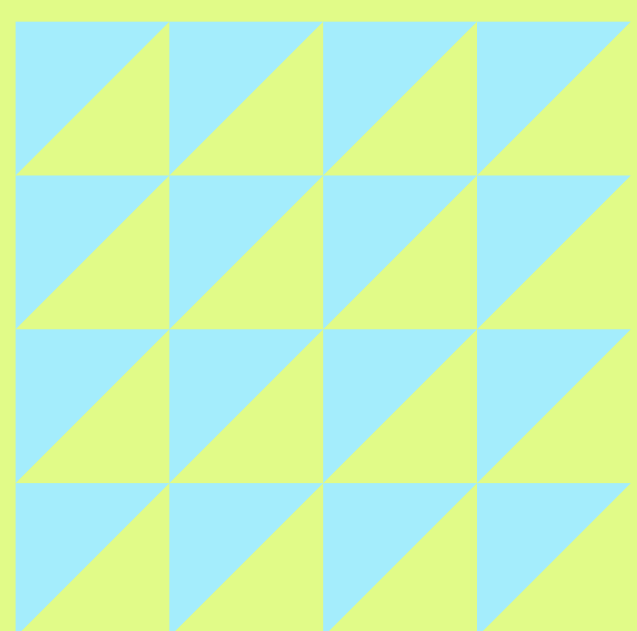
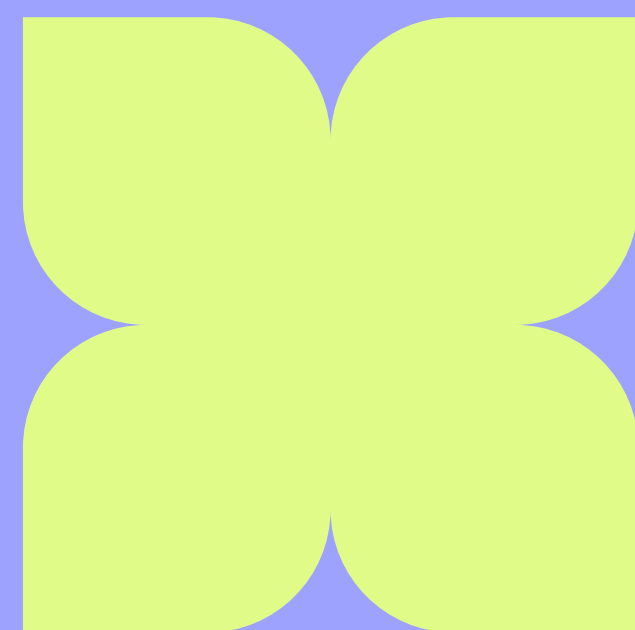
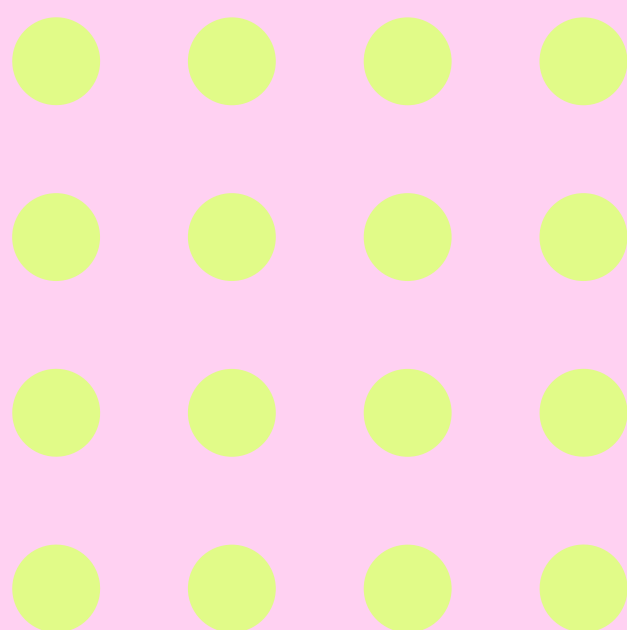
David Barber is a Sales Performance Management (SPM) solutions specialist at OpenSymmetry, responsible for strategically growing and managing the US client base. With 17 years of experience in sales effectiveness, sales operations management, and incentive compensation technologies, David has helped companies of all sizes and across various industries improve the execution of their sales compensation programs. Coupled with over 20 years of experience in technology and consulting sales, David has a deep understanding of the best practices in sales operations and incentive compensation. David is an industry expert and has guided many leading US and international clients through complex multi-phase transformation initiatives.



So excited you're here!

Thursday, November 14, 2024
300 Mission, San Francisco, CA

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