

# EVERCORE ISI

INAUGURAL ARTIFICIAL INTELLIGENCE CONFERENCE

AUGUST 8, 2023 - VIRTUAL



10:00am – 10:50am ET	<p><b>Introduction: How Generative AI Changes Everything</b></p> <p>Speaker:</p> <ul style="list-style-type: none"><li>- Saam Motamedi, Partner, Greylock Partners</li></ul> <p>Moderated by: Mark Mahaney (<i>Internet</i>) and Marc Harris (<i>Director of Research</i>) Evercore ISI</p>
11:00am – 11:50am ET	<p><b>Panel Discussion: The AI Revolution: Identifying Investment Opportunities in Generative AI</b></p> <p>Speakers:</p> <ul style="list-style-type: none"><li>- Michael Stewart, Partner, M12, Microsoft Venture Capital Fund</li><li>- Vanessa Larco, Partner, NEA</li><li>- Aaron Jacobson, Partner, NEA</li></ul> <p>Moderated by: Kirk Materne (<i>Software</i>) and Mark Mahaney (<i>Internet</i>)</p>
12:15pm – 1:30pm ET	<p><b>Introducing the AI Impact Navigator: A Proprietary Framework for Evaluating Generative AI Labor Leverage Across Industries</b></p> <p><b>Broken out as follows:</b></p> <p><b>Gen AI 101 &amp; Evercore ISI AI Impact Navigator</b></p> <p>Speakers:</p> <ul style="list-style-type: none"><li>- David Shrier, Professor of Practice, Imperial College Business School</li><li>- Julian Emanuel, Head of Equity, Derivatives &amp; Quantitative Strategy and Portfolio Strategy, Evercore ISI</li></ul> <p><b>CIO Panel:</b></p> <ul style="list-style-type: none"><li>- Jordi Visser, President and CIO, Weiss Multi-Strategy Advisers LLC</li><li>- Patrick Klein, PH.D., Head of Multisector Strategies for the Franklin Fixed Income Group</li></ul> <p>Moderated by: Marc Harris (<i>DOR</i>), Julian Emanuel (<i>Derivatives &amp; Quant Strategy &amp; Portfolio Strategy</i>) and David Shrier (<i>Prof of Practice, Imperial College Business School</i>)</p>
12:15pm -12:50pm	
1:00pm – 1:30pm	

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1:35pm – 2:15pm ET	<p><b>AI and Creative Content Case Study: How Gen AI Is Impacting &amp; Will Impact Media &amp; Advertising</b></p> <p>Speakers:</p> <ul style="list-style-type: none"><li>- Michael J. Wolfe, Founder &amp; CEO, Activate Consulting</li><li>- Daniel Song, VP, Engineering at Publicis Sapient (Publicis Groupe SA)</li><li>- Peter Micelli, Co-Founder and CEO, Range Media Partners</li></ul> <p>Moderated by: Mark Mahaney (<i>Internet</i>) and Kutgun Maral (<i>Media &amp; Telco</i>)</p>
2:20pm – 3:00pm ET	<p><b>The Workforce Transformation. How Generative AI will Reshape our Traditional Understanding of Work and the Future Labor Force.</b></p> <p>Speakers:</p> <ul style="list-style-type: none"><li>- Ernie Tedeschi, Chief Economist, The White House Council of Economic Advisers</li><li>- Dr Mark Thomas Kennedy, Associate Professor and Co-Director of the Data Science Institute, Imperial College London</li></ul> <p>Moderated by: Marc Harris (<i>Director of Research</i>), Francesca Ponziani (<i>Economics</i>), Marco Casiraghi (<i>Policy and Economics</i>)</p>
3:10pm – 4:00pm ET	<p><b>A Thought-Provoking Debate: Will AI Enhance Business and Society?</b></p> <p>Speakers:</p> <ul style="list-style-type: none"><li>- Professor Melanie Mitchell, Professor, Science Board Co-chair &amp; Science Steering Committee, Santa Fe Institute</li><li>- Professor Thomas Malone, Patrick J. McGovern (1959) Professor of Management at the MIT Sloan School of Management and the founding director of the MIT Center for Collective Intelligence</li></ul> <p>Moderated by: Marc Harris (<i>Director of Research</i>), Mark Mahaney (<i>Internet</i>), Amit Daryanani (<i>Hardware</i>)</p>
4:10pm - 5:00pm ET	<p><b>Future Proofing Businesses for Growth in the Era of AI</b></p> <p>Speaker:</p> <ul style="list-style-type: none"><li>- Sanjeev Vohra, Advisor on A.I., &amp; Advanced Technologies. Former Global Business Head of Applied Intelligence, Accenture</li></ul> <p>Moderated by: Jon Chappell (<i>Transportation and Logistics</i>), Glenn Schorr (<i>Brokers, Banks &amp; Asset Managers</i>), David Palmer (<i>Food &amp; Restaurants</i>)</p>

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**Saam Motamedi** is wholly focused on partnering with the next generation of enterprise software entrepreneurs, leveraging his experience helping companies scale from initial product through growing revenues. He partners with entrepreneurs at the seed and early stages who are focused on new opportunities in applied AI, cybersecurity, data and machine learning infrastructure, and SaaS.

At Greylock, Saam has led investments in and sits on the board of security companies like Abnormal, Apiiro, and Opal; application companies like Cresta; data & analytics companies like Snorkel, and infrastructure companies that are also still operating in stealth. Additionally, he works closely with Avi Networks (acq. by VMWare), Clockwise, Notable Health.

Saam brings hands on perspective on the ideas and people who have the potential to drive the transformation of the enterprise software stack. Prior to joining Greylock, Saam founded Guru Labs, a machine learning driven fintech startup, and previously worked in product management at RelateIQ, one of the first applied AI software companies. There, Saam drove the development of data products before and through the company's acquisition by Salesforce. His background makes him a natural partner to founders as they navigate the first critical steps of company-building, recruiting and customer development. He is dually obsessed with helping founders advance nascent concepts into companies, and understanding the inner-workings and needs of large enterprise customers.

Saam grew up in Houston, Texas and holds a B.S. in Computer Science from Stanford University, where he was a Mayfield Fellow. Outside of work, Saam is an avid tennis player, reader of old books, and fervent fan of Stanford and Houston sports teams.

**Vanessa Larco** joined NEA as a Partner in 2016 and focuses on enterprise SaaS and consumer investing. She is passionate about well-designed products and services that enable people to be more productive and fulfilled at work and at home. Vanessa has led investments in Assembled, Cleo, Evernow, EvidentID, Kindred, Mejuri, Rewind AI, Rocket.Chat, Greenlight Card, Orby AI and Lily AI. She is also a board observer at Forethought AI, Safebase, and Heavy. AI. She was a board observer at Robinhood (NASDAQ: HOOD) until its IPO in 2021.

Prior to joining NEA, she was the Director of Product Management at Box (NYSE: BOX) where she worked on building the next generation of productivity apps across web and mobile. Her passion for design and analytics stems from her experience in the gaming industry, which includes leading the Speech Recognition Experience team at Xbox Kinect v1, and building a top-grossing gaming studio at Disney Social.

Outside of investing, Vanessa is on the board of LatinxVC with the goal of increasing diversity in Venture Capital. She's also on the board of advisors for the College of Computing at Georgia Tech and Venture Atlanta working on creating more entrepreneurial opportunities for students in the southeast.

Vanessa holds a BS in Computer Science from the Georgia Institute of Technology.

**Aaron Jacobson** invests in entrepreneurs pioneering the next-generation of Cloud Apps, AI, DevOps, Cybersecurity, and Robotics. He serves as a board director or observer for Embrace, Rapid Robotics, Pulum, Tigera, ForAllSecure, illusive networks, Streamsets, Built Robotics, and Juvo. He has also worked

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closely with many other NEA portfolio companies including Databricks, Box (NYSE:BOX), NGINX (acquired by F5), Bloom Energy (NYSE:BE), and Coursera (NYSE:COUR). In 2016 he was named to Forbes Magazine's "30 Under 30" in Venture Capital and the Silicon Valley Business Journal's "40 Under 40".

Prior to joining NEA, Aaron spent two years at Qatalyst Partners in San Francisco. At Qatalyst, Aaron worked as an Analyst engaged in various M&A transactions, which included the sale of PopCap Games to Electronic Arts, the sale of Riot Games to Tencent, the strategic investment in Go Daddy from KKR / Silver Lake / TCV, the sale of Palm to HP, and Conexant's sale to Golden Gate Capital, among others.

Aaron graduated Summa Cum Laude from the Jerome Fisher Program in Management and Technology at the University of Pennsylvania, where he earned dual Bachelor of Science degrees in Economics and Electrical Engineering, and carried a minor in Math.

**Michael Stewart** began his investing career at Applied Ventures, where his investment areas included AI/ML hardware and software, silicon photonics, high precision robotics, and printed electronics.

He has served on the boards of twelve AV portfolio companies, including M12 portfolio company Syntiant, and Rockley Photonics (NYSE:RKLY). Prior to joining Applied Ventures, Michael spent 15 years in advanced technology development at Applied Materials and Intel Research, after postdoctoral work in a DARPA program.

Michael was co-founder of consumer electronics focused startup JUSE, and the inventor of the low-cost CRAFT Cell for silicon photovoltaics.

He holds a Ph.D. in Chemistry from Purdue University and an MBA from the Haas School of Business, and is an inventor on over 40 US and world patents and author of 30 peer reviewed publications.

**David Shrier** is a globally recognized expert on strategic growth. In addition to leading venture studio Visionary Future, David is a Professor of Practice (Artificial Intelligence & Innovation) with Imperial College Business School where he co-leads the new Trusted AI Initiative.

David has developed \$10 billion of corporate venturing opportunities with Fortune 1000, financial services firms and growth equity. He previously advised the European Parliament on its AI Act and more broadly has worked with over 100 countries on technology policy. David is known for creating the four most profitable online classes in history that deployed into over 150 countries, delivering ~ US\$ 1 billion in financial support to MIT, Harvard & Oxford. He previously held a rare dual appointment with MIT and with the Saïd Business School, University of Oxford.

David has published 8 books in the past 8 years on the technology economy. His 9th book, Basic AI: A Human Guide to Artificial Intelligence, will be published by Little, Brown and Harvard Business Publishing in 2024. David Shrier was granted an Sc.B. from Brown University in Biology and Theatre.

**Patrick Klein** is a senior vice president and portfolio manager for Franklin Templeton Fixed Income - Multi Sector and Quantitative Strategies in San Mateo, California, United States. Dr. Klein is responsible for leading a team managing multisector fixed income strategies, with a focus on portfolio construction and quantitative modeling.



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Dr. Klein has 16 years of experience in the financial services industry. Prior to his current role, Dr. Klein was a research analyst for Franklin Templeton Fixed Income. He joined Franklin Templeton in 2005, specializing in mortgage-backed securities. Previously, he was a researcher at Sandia National Laboratories, developing models for the computer simulation of material behavior.

Dr. Klein holds a bachelor of arts in mechanical engineering and materials science from Cornell University, and a PhD in mechanical engineering from Stanford University.

**Jordi Visser** has over 30 years of experience in the investment and finance industry. At Weiss, Jordi oversees the portfolio managers and is responsible for the overall risk aggregation. He joined Weiss in 2005 and ran a macro portfolio before becoming the President and Chief Investment Officer. Additionally, he is the architect and a portfolio manager for the Weiss Alternative Multi-Strategy Fund (Ticker: WEISX), a strategy that reflects the firm's market neutral approach and the desire to make its expertise in alternatives universally accessible. Jordi is the host of the video series "Real-Time with Jordi Visser" and a lead contributor to the firm's podcast, "In Search of Green Marbles." Jordi began his career at Morgan Stanley, where he held various senior management roles, including opening the office for the firm in Brazil. Jordi has been featured as a guest speaker on various popular podcasts and media outlets. Jordi is a magna cum laude graduate of Manhattan College and a Board Member of the School of Business at Manhattan College.

**Michael J. Wolf** is the Founder and CEO of Activate, Inc., the leading management consulting firm specialized in technology, internet, media, and entertainment businesses.

Activate Consulting's clients include leading companies across the tech and media industry: internet, eCommerce, TV programming, telecommunications, digital publishing, sports, video games, music, mobile entertainment, information, theme parks, hardware, devices, business information, and consumer services. The firm has led major growth initiatives for these companies in areas such as strategy, marketing, acquisitions, new businesses, and technology development.

Previously, Wolf was President and Chief Operating Officer of MTV Networks (now Viacom Media Networks), where he was responsible for leading all of the company's business, finance, sales, operations, technology, and production. Prior to MTVN, he was Global Managing Partner of McKinsey & Company's Media, Entertainment, and Information Practice. He was McKinsey's first direct-elect Senior Partner hire, joining from Booz Allen Hamilton, where he founded and led the firm's global Communications, Media, and Technology Group. He was also a member of Booz Allen's Board of Directors and Executive Management Team.

Wolf served as a Director at Sotheby International (NYSE: BID), Yahoo Inc. (NASDAQ: YHOO), and Entercom Communications (NYSE: ETM). He is a graduate of Columbia University, where he earned a BA in International Relations and is a member of the Council on Foreign Relations.

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**Daniel Song** is the former Chief Innovation Officer at HealthRede and currently the Vice President of Global Engineering at Publicis Groupe. He has 20+ years of experience building solutions, selling, developing and delivering digital and artificial intelligence strategies and capabilities across multiple industry.

In addition to their own internal Gen AI platform that they're building leveraging OpenAI, Azure, and Hugging Face large language models, this expert leads partnerships with Microsoft, Amazon, and Google from an AI platforms 3rd party vendor perspective. Additionally, he confirmed that they work with Jasper, Cohere, and Anthropic.

They have a generative AI strategy and this expert is one of the leaders of the development and implementation of that strategy, with an approximate spend for generative AI solutions in the tens of millions.

**Ernie Tedeschi** currently serves as Chief Economist at The White House Council of Economic Advisers. Prior to that Ernie was a managing director and policy economist for Evercore ISI. Tedeschi, who formerly served as an economist at the U.S. Treasury Department, has been a prominent economic voice in the pandemic. His analysis is often published in the New York Times, and his columns have spanned a range of economic topics including the minimum wage and the impact of school closures on mothers' participation in the workforce.

**Dr Mark Kennedy** studies how innovations become real. When people encounter the novel and unfamiliar, they first ask, "Is this anything?" When collective answers are more 'yes' than 'no', innovations gather momentum and either gain widespread legitimacy or, in rarer cases, incite backlash and social or legal sanctions. Both outcomes are facilitated by categorizing innovations, so they become proper elements of socially shared ontologies. Dr. Kennedy's research explores the dynamics of categories and social ontologies using quantitative methods for text and network analysis and qualitative and inductive methods. His publications have appeared in American Sociological Review, Academy of Management Journal, Organization Science, Journal of Management Studies, and Research in the Sociology of Organizations.

Current research projects include (1) the emergence and spread of AI and its impact on organizations and society, (2) understanding backlash to negative externalities associated with innovations in organizing in both historical cases and current skirmishes over data science and AI, (3) methods of text analysis for identifying complementarities and observing meaning construction, and (4) understanding how individuals pick the people they rely on for friendship, help, and advice in work and life.

At Imperial, Dr. Kennedy is Co-Director of the Data Science Institute and Director Imperial Business Analytics. He teaches courses in Organization Behavior and Organization Theory.

Dr. Kennedy holds degrees from Northwestern University (Ph.D., MBA) and Stanford University (A.B., Philosophy). Before coming to Imperial, Dr. Kennedy was at the University of Southern California's

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Marshall School of Business. Prior to becoming an academic, Dr. Kennedy was a software engineer and management consultant.

**Melanie Mitchell** is a Professor at the Santa Fe Institute. Her current research focuses on conceptual abstraction, analogy-making, and visual recognition in artificial intelligence systems.

Melanie is the author or editor of six books and numerous scholarly papers in the fields of artificial intelligence, cognitive science, and complex systems. Her book *Complexity: A Guided Tour* (Oxford University Press) won the 2010 Phi Beta Kappa Science Book Award and was named by Amazon.com as one of the ten best science books of 2009. Her latest book is *Artificial Intelligence: A Guide for Thinking Humans* (Farrar, Straus, and Giroux).

Melanie originated the Santa Fe Institute's Complexity Explorer platform, which offers online courses and other educational resources related to the field of complex systems. Her online course "Introduction to Complexity" has been taken by over 25,000 students, and is one of Course Central's "top fifty online courses of all time".

**Thomas W. Malone** is the Patrick J. McGovern (1959) Professor of Management at the MIT Sloan School of Management and the founding director of the MIT Center for Collective Intelligence. At MIT, he is also a Professor of Information Technology and a Professor of Work and Organizational Studies. Previously, he was the founder and director of the MIT Center for Coordination Science and one of the two founding codirectors of the MIT Initiative on Inventing the Organizations of the 21st Century. Malone teaches classes on organizational design, information technology, and leadership, and his research focuses on how new organizations can be designed to take advantage of the possibilities provided by information technology.

Malone predicted in an article published in 1987 many of the major developments in electronic business over the following 25 years, including electronic buying and selling for many kinds of products. In 2004, Malone summarized two decades of his research in his critically acclaimed book, *The Future of Work*. His newest book, *Superminds*, appeared in May 2018. Malone has also published over 100 articles, research papers, and book chapters. He is the coeditor of four books.

Malone has been a cofounder of four software companies and has consulted and served as a board member for a number of other organizations. He is also an inventor with 11 patents.

His background includes work as a research scientist at Xerox Palo Alto Research Center (PARC), a PhD from Stanford University, an honorary doctorate from the University of Zurich, and degrees in applied mathematics, engineering, and psychology.

**Sanjeev Vohra** is the former global lead of Accenture Applied Intelligence (2002-2023). He is a seasoned leader and respected innovator with more than 18 years at Accenture serving in a variety of leadership roles focused on large-scale digital transformation to create new growth opportunities. He is also a member of Accenture's Global Management Committee.

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In his current role, Sanjeev helps clients across industries and markets evaluate, maximize, and scale business value through the strategic application of data, advanced analytics, artificial intelligence, and automation. He is responsible for the company's Applied Intelligence strategy, business growth, talent development, industry-specific solutions, strategic partnerships, and V&A investments.

Before being named to his current position in July 2020, Sanjeev was Accenture's Growth and Strategy lead for Technology where he led all aspects of Technology's business strategy and investments, including ventures and acquisitions. Prior to this role, Sanjeev spearheaded Accenture's data services portfolio, during which time he led several transformative strategies and solutions that created tangible business value from data.

In 2013, when Accenture created Accenture Digital, Sanjeev played a central role in developing differentiated digital capabilities that significantly advanced our clients' digital transformation journeys. He helped shape Accenture's culture of continuous learning and new skilling that continues to drive new capabilities for the company and its clients.

Prior to joining Accenture in 2002, Sanjeev's experience spanned areas including supply chain operations and process re-engineering, manufacturing, engineering and telecommunications, demand planning, distribution and customer experience transformation, leveraging advanced analytics, and ERP.

In addition, Sanjeev possesses unique experience in developing strategic partnerships between Accenture and leading academic institutions including MIT, Stanford, Wharton, and Harvard, to develop several ground-breaking learning programs and research. Sanjeev is a sought-after speaker for industry and partner events and has published thought leadership in the areas of data, AI, and technology impact on business.

Sanjeev holds a Bachelor of Technology degree and an MBA from the Indian Institute of Technology Delhi.