

Colorado SBDC TechSource: Commercialization

Facilitators & Subject Matter Experts



Stephanie Amend

SBIR/STTR grants and contracts, government contracting

Stephanie Amend is the founder of Arrowhead Solutions, LLC; a full service solutions provider for government contracting and SBIR/STTR grants. Ms. Amend founded Arrowhead Solutions in 2009 after holding contract management positions in both government and private industry for nearly nine years. Arrowhead was formed with the goal of providing companies with the extra knowledge and manpower they need to succeed in the world of government contracting and innovation grants. Specializing in capture management, proposal preparation, contract management, subcontracts, accounting and compliance; Arrowhead provides skill sets not commonly available to many smaller government contractors and smaller technology ventures. Stephanie is a specialist speaker and consultant for SBDC TechSource, Colorado Emerging Ventures and the Technology Ventures Series on a variety of

SBIR and Contracting topics including SBIR/STTR Basics, Top 10 Mistakes to Avoid in the SBIR/STTR World. Arrowhead Solutions, SBDC TechSource and other organizations partner on www.coloradosbir.com to increase timely information and education for Colorado's SBIR and government contracting companies.



Suzi Bahnsen

Strategic marketing/business model development, branding, digital marketing strategies, tactical planning

Suzi Bahnsen is a branding expert, marketing maven, previous owner of Launchpad Interactive and founder of the digital marketing company, Turn Left. She thrives on staying one step ahead of marketing trends and developing creative solutions that help her clients reach their target audiences. Her experience as a business owner, combined with her background overseeing marketing and sales teams, provides her with a unique understanding that comes through as she continues to share and grow. As Assistant Director of Boulder SBDC she lends her advice and support to businesses with desire to thrive in a digital age.



Courtney Berg

Human resources and organizational development expertise – basics through advanced, strategic planning and productivity training

Business humorist Courtney Berg believes in the passion of business owners. She has more than 30 years of human resources and operations management experience, with for-profit and not-for-profit companies ranging in size from a family-owned furniture store to a national insurance corporation. Her experience includes front-line supervision to executive level positions in both human resources and operations. Courtney founded CourtSide® to help business owners put human resources and management processes in place to increase the organization's effectiveness. Courtney was appointed to the Colorado Small Business Council by Governor Hickenlooper. She has also been a Denver Metro Chamber of Commerce Chamber Champion and a Denver Business Journal "Outstanding Woman" nominee. She was featured in "How to Conduct Annual Employee Reviews" in Inc. Magazine. She holds the Senior Professional in Human Resources (SPHR) designation from the HR Certification Institute.



Jamie Brandess

SBIR/STTR agencies and topics, program development, event management

Jamie Brandess is Program Manager for the statewide Colorado SBDC TechSource: Commercialization program. She is the first contact for both Center Directors and clients to tap into the resources of this program. She began her career in nonprofits by working at United Way. She then transitioned to economic development with the Boulder SBDC as Marketing and Events Director, and later as a consultant. She moved on to statewide programming for technology businesses after several years at the local center. Additionally, she has worked on starting several businesses of her own. She holds a B.A. in International Political Economy from Colorado College.



Allie M. Clark, Esq.

Legal expertise, M&A, venture funding

Allie Clark is an Associate Attorney at Sage Law Group LLC. Her practice focuses on both the representation of early stage and mature private companies in connection with general corporate matters, capital raises and complex national and international M&A transactions, as well as the representation of venture capital investors in connection with equity and debt financing transactions and recapitalizations. Allie is licensed in Colorado and Massachusetts. Before joining Sage Law Group, she represented emerging growth and mature private companies in Boston, MA.



Eric Drennan

Intellectual property (IP) protection, business law

Eric Drennan is Shareholder and Board Secretary at Denver law firm, Holzer Patel Drennan. Eric combines his technical background in mechanical and manufacturing engineering technology with 10+ years of intellectual property (IP) legal experience to effectively and efficiently develop his clients' IP assets. Eric's practice focuses on patent preparation and prosecution, patent analysis, IP due diligence, and IP portfolio management. Eric works in a variety of technical areas including, for example, mechanical devices, manufacturing technology, propulsion systems, materials science, data storage systems, semiconductor devices, telecommunications, electronics, consumer goods, and Internet-based technology.



Reagan Freed

Human Resources

Reagan Freed, owner/founder at Solvere HR Consulting, is an accomplished HR executive with extensive experience supporting small, mid- and large businesses as they develop people strategies that support organizational goals. Her experience ranges across a wide variety of industries including engineering, construction, telecommunications and business process outsourcing (BPO). Reagan has experience working in the United States and internationally in Europe, Middle East, Australia/New Zealand, Liberia and many countries in Asia. She earned her Bachelor's in Business Management from the University of Colorado, Denver and is a certified SHRM-SCP.



Andra Hargrave

Government contracting, SBIR/STTR grants and contracts, identifying topics and agency opportunities, strategic marketing, business development

Andra Hargrave has over 15 years of direct national and international sales channel development in the areas of government procurement and fortune level 500 business development. His marketing channel development experience lies in a variety of industries, including technology-oriented manufacturing, service industries and distribution. Hargrave possesses an in-depth knowledge of state and federal set-aside procurement programs, such as SDB, HUB and the 8a Business Development Program, among others. He has served as the director of certification for the RMMSDC and currently serves as the statewide veteran's consultant for the Colorado SBDC Network. His comprehension of federally-backed procurements, grants and certification programs, such as Advanced Technology and SBIR/STTR, is without equal.



Ruth Janjic

Market research/sizing, market and business analysis, developing strategic marketing plans

Ruth Janjic is a marketing specialist with deep experience conducting secondary industry research, marketing analysis and strategy work. Ruth started her career in sales and marketing for one of the first Apple retailers, followed by a stint in high-growth technology firms, including Qualcomm. She switched to consulting during the dot-com boom, evaluating the online advertising and revenue models of emerging online publishers, and eventually advising on digital marketing strategies for traditional companies as they came online. Ruth has since spent hundreds of hours researching the strategies of a broad range of industries, including technology, publishing, retail, and professional services. More recently, she added not-for-profit organizations and small businesses to her knowledge base and enjoys helping them with their marketing challenges. Ruth holds an M.B.A. from the University of Washington and a B.A. from the University of New Hampshire. She is nationally-certified as an Economic Gardening Market Research Specialist through the

Edward Lowe Foundation.



William F. (Bill) Jones

Accounting and finance, strategic business consulting, access to capital, financial reporting including audit services, taxes

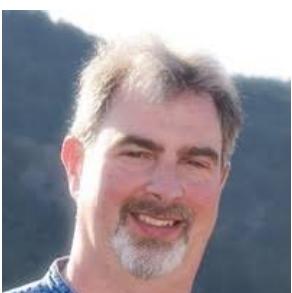
Bill Jones is a Principal at Jones & Associates, P.C. A graduate of Metropolitan State College of Denver with a Bachelor of Science in Accounting, Bill spent 6 years in private industry before entering public accounting. With 25+ years serving clients as a CPA, he values the role of trusted advisor. He has broad experience in financial reporting including audit services, in management consulting and fraction CFO assistance, and individual and business income taxes. Bill has overseen engagements ranging from start-ups to companies with over \$1 billion in revenue, but his focus is on serving small, closely held, owner managed businesses and the related individuals. Bill has served in various capacities with non-profits organizations. He currently serves on the board of the Erie Colorado Chamber of Commerce and as a consultant and Board member for the Boulder SBDC and Foundation. He was formerly as a member of the Governor's Colorado Small Business Advisory Council.



Cindy Kalman

Branding/marketing, Powerpoint for pitches and presentations

Cindy Kalman is principal designer and owner of Kalmarx Design and OnPoint Presentation. Cindy has built over 25 years of expertise, including as head graphic artist for the Washington office of MacNeil Lehrer News Hour, as well as experience working with small to enterprise size companies. At her core, Cindy is a storyteller with an expertise in turning words into meaningful images. This skill, along with her strong technical background, allows her to offer a wide array of design services, creating PowerPoint custom themes, presentations and animations, print collateral, branding, website artwork, and endearing illustrations.



Ed Kase

Market research/sizing, SBIR/STTR, technology commercialization, business development, developing business and strategic marketing plans, product management, new product launches, marketing communication programs, product positioning and event management

Ed Kase, President of EKase Consulting, provides strategic marketing, product management, and business development consulting services for both early stage ventures and established companies. Ed brings diverse operational experience, as well as great success launching products into new markets. Achievements also include reversing declining revenue trends for established products. Ed has extensive experience in the software industry, mostly focused on technical software used in engineering and scientific disciplines. Distinctive competencies include visualization, technical data analysis, numerical modeling, and high-performance computing. Clients include Aweida

Venture Partners, Docsforce, Foresight Science & Technology, Kozio, Inc., Parallel Scientific Labs, and Prosocial Applications, among others.



Sharon King

Technology Commercialization, SBIR/STTR and other innovation grants, Access to capital, Contracting opportunities, Business & marketing strategic planning. Sharon is Team Leader for both the Colorado SBDC TechSource Program and the SBDC Advanced – Economic Gardening Gold program

In the past 15 years, Sharon King and the Boulder SBDC have worked with over 7,000 entrepreneurs from startups through 2nd stage companies, from "Main Street" businesses through highly scalable manufacturing and Advanced Industries. Just before joining the SBDC in 2004, Sharon converted and re-branded a franchise hotel into the independent Boulder Outlook Hotel, in which she was an investor. In the 30 years between, Sharon has been an entrepreneur, marketing executive and consultant for small (and larger) businesses in a wide range of industries. She holds an MBA from Cornell University, is a Certified Technology Commercialization Consultant by the University of Houston and is nationally-certified by both the Kauffman Center for Entrepreneurship and the Edward Lowe Foundation (as an Economic Gardening Team Leader).



Mollybeth (Molly) Kocialski and the Rocky Mountain Regional United States Patent and Trademark Office (USPTO)

Intellectual Property (IP), patent licensing, IP strategy, IP law

Molly Kocialski has been Director of the Rocky Mountain Regional United States Patent and Trademark Office (USPTO), since January 2016. She carries out the strategic direction of the Under Secretary of Commerce for Intellectual Property and Director of the USPTO, and is responsible for leading the Rocky Mountain regional office. She ensures that the USPTO's initiatives and programs are tailored to the region's unique ecosystem of industries and stakeholders. In that role, Molly and her team in Denver collaborates with the Colorado SBDC TechSource – Innovate program, providing consulting assistance directly to our clients, as needed. Molly presents workshops for SBDC TechSource on the entire range of intellectual property options for technology businesses, including the patent process.

Molly brings more than 20 years of intellectual property experience to the USPTO and to Colorado SBDC TechSource clients. Most recently, she was the Senior Patent Counsel for Oracle America, Inc, where she was responsible for managing an active patent prosecution docket and was also responsible for all of the post-grant procedures and patent investigations for Oracle and its subsidiaries. Prior to Oracle, she worked at Qwest Corporation and was also in private practice in both New York and Colorado focusing on intellectual property litigation for multiple high-tech companies while maintaining an active prosecution docket.

Molly is a recognized IP leader in the Rocky Mountain region. She currently serves on the Colorado Federal Executive Board's Executive Committee, is the Vice President of the Colorado IP Inn of Court and was previously the Chair of the Planning Committee and a member of the Board of Directors of the Colorado IP Inn of Court. Further, she is a member of the Planning Committee for the Rocky Mountain Intellectual Property Institute, Chair of the Intellectual Property Section of the Colorado Bar Association and served on the Colorado Bar Association's Board of Governors. Molly was recognized by ManagingIP magazine as one of its North America Corporate IP Stars.

Molly is a graduate of the State University of New York at Buffalo School of Law and received a Bachelor of Science in Chemical Engineering from the University of New Mexico. She is a registered patent attorney and is admitted to the U.S. Patent and Trademark Office, the New York and Colorado state bars as well as to the United States Courts in those jurisdictions.



Sara Knudsen

Graphic design, website development, social media management, event planning, branding, email marketing

Sara Knudsen is the owner of Gold Stripe Consulting, LLC, a consulting firm which provides graphic design, digital marketing and website development services for small businesses, non-profit organizations and government agencies. She is also the executive director of the Colorado Business Development Foundation, a non-profit organization that develops and funds small business resources across the state. Prior to opening Gold Stripe Consulting, Knudsen was the Deputy Director of Communications for the Colorado Small Business Development Center Network, where she managed federal and state government grants totaling more than \$2 million annually as well as all aspects of planning more than 10 statewide businesses training conferences, including securing speakers, sponsorships, travel, marketing and more. Knudsen was also responsible for the statewide branding across the entire statewide SBDC network, in which she standardized both print collateral and online presence. Knudsen graduated magna cum laude from the University of Nebraska-Lincoln with a bachelor's degree in marketing and Spanish.



Wayne Kocina

GIS research, analysis and strategy development

Wayne Kocina, a seasoned industry veteran with more than twenty years of experience in GIS, founded GeoWize in 2003. As CEO, he is responsible for the overall operations of GeoWize. The company's mission is to provide better information for better decisions to small and middle sized business giving them the same competitive advantage that the "big guys" have! Wayne has provided GIS services and consulted for such companies as Target, Big O Tires, Smiling Moose Deli, Vom Fass, US West, Qwest, Unisys (France), Telebras (Brazil) & Telebras - CpQD, Idea Integration, the City of Littleton, numerous other cities and communities, and hundreds of small businesses. Wayne is one of the founding members and the GIS component of the Economic Gardening National Strategic Research Team (EG-NSRT). He is currently working with twenty one state-wide EG programs, and numerous community programs. Wayne has managed a \$100M GIS development & deployment project, vehicle tracking projects, spatial enterprise data projects, and more than one thousand site prospecting, competitive intelligence, and market intelligence projects using ESRI's ArcGIS and Business Analyst tools coupled with demographic, income, spending, market & spatial data from the world's leading providers of this data. These are the same tools that many of the biggest and most successful retail business use to give them a real "competitive advantage" over their competitors.



Thierry Lepoutre

Federal R&D Tax Credits

Thierry Lepoutre is Founder and President of Boostr Consulting LLC, providing consulting services to help innovative companies successfully claim R&D Tax Credits and obtain refunds from the government. Thierry has over 20 years experience in recovering R&D Tax Credits for innovation (R&D) companies in all industries, ranging from one-person startups to large multinationals.



Mark Lumsden

Accounting and finance, strategic business consulting, access to capital

Mark E. Lumsden is a Tax Director at ACM. He works with clients in a variety of industries but primarily focuses in the middle market on closely held, private companies. Mark's specialties include: S-corporations, C-corporations, Partnerships, Start-ups, Tax planning, Succession planning, Tax minimization consulting. Industries include: Technology, Manufacturing, Professional firms, Construction, and Real estate. Mark joined ACM's team about three years ago, and has been in public accounting for 11 years. He graduated from the University of Colorado, Boulder, with degrees in accounting and economics. Mark is a CPA and CCIFP and is a member of the Construction Financial Management Association, the Institute of Certified Construction Industry Financial Professionals, the American Institute of Certified Public Accountants, and the Colorado Society of Certified Public Accountants.



Fredrik Mollborn

Intellectual property/patents

Fredrik Mollborn is a registered Patent Agent and the founder and owner of Mollborn Patents, Inc., a small intellectual property firm in Boulder. Fredrik helps inventors, as well as companies of all sizes with obtaining high-quality and affordable patents. Prior to founding Mollborn Patents, Inc. in 2006, Fredrik worked in several leading intellectual property law firms in Europe and Silicon Valley. In addition to preparing and prosecuting design and utility patent applications before the United States Patent and Trademark Office, Fredrik also provides strategic counseling about the best way to build and maintain a patent portfolio, and how to protect IP outside the U.S.

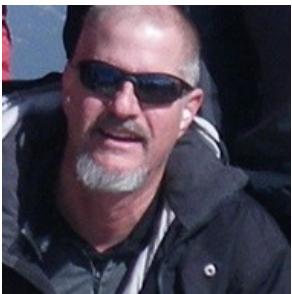


Yoriko Morita

Intellectual property (IP), patent licensing, IP strategy, patent portfolio management, IP law, patent prosecution, standard-essential patents, due diligence and patent standards

Yoriko Morita is Founder and President of Patents Integrated, based in Louisville, CO. After earning her Ph.D. in electrical engineering, Yoriko left her life in the lab and combined her science and technology background with her business side. Since 1996, she has been creating and commercializing patent portfolios by combining her Ph.D. and MBA with the legal training she earned under the tutelage of a group of highly regarded Patent Attorneys at the Pritzkau Patent Group. Yoriko is a Registered US Patent Agent and Certified Licensing Professional (CLP). Part psychoanalyst...part secret agent...part corporate warrior. In the world of intellectual property law, Yoriko has built alliances and bridged the gap between organizations and negotiated contracts that have generated millions in revenue.

After forming her own IP consulting company in 2014, Soumei Consulting, Yoriko put a variety of clients on a concrete and strategic road to commercialization.



Brian Ormsby

DCAA accounting compliance, accounting & contract management, financials/Indirect Rates

Brian Ormsby, Founder & CEO at Pantheon Solutions, is passionate about helping small business succeed in the difficult terrain that is government compliant accounting and contract management. Brian is a US Air Force Veteran serving in Cost & Budget Analysis. He spent 10 years as the Director of Operations and Program Manager with Pathfinder Systems, Inc. building simulators for the US Department of Defense and NATO allies. Brian has extensive experience in cost and pricing. During his tenure at Pathfinder, Brian was responsible for all Cost Volume submission for the company's proposals to the DoD and NATO allies (several per year). Brian currently specializes in helping firms manage their accounting and contracts with the DoD, NSF, NIH, DOE and NASA. Brian is a certified ISO 9001 Quality Auditor as well as a DOT certified Cost Analyst. He holds a BS in Management from Regents College.



James Oury

Company set-up, Investment, talent, tax, IP, data privacy, technology transactions, M&A, fintech

James Oury is Founder of Oury Law, based in Durango and Denver. James is a US Attorney, British Lawyer and Accountant with 25 years of global legal experience. He is a serial entrepreneur (3 start ups and exits) and a Member of the International Bar Association. Oury Law provides actionable advice to technology entrepreneurs looking to propel growth.



Karri Palmetier

Legal aspects of government contracts

Karri Palmetier is a partner at Palmetier Law, which was founded to help small and medium-sized businesses navigate the maze of government contracting regulations. Karri brings more than two decades of experience in government contracting and aerospace and defense industries. She started her career as a U.S. Air Force judge advocate where she supported major defense programs, base operational contracting, and international and joint war operations. Karri gained additional breadth working in a major D.C. law firm on a variety of government contracting matters. Karri then joined the in-house legal department at United Launch Alliance where she supported multiple issues across the company, including major government and commercial contracts, business system compliance, Freedom of Information Act, subcontract administration, and major litigation. Before establishing her own practice, Karri acted as

the Chief Operating Officer and General Counsel for Special Aerospace Services, a certified 8(a) woman-owned small business. She uses her unique and diverse background to advise companies on all aspects of government contracting, including translating and simplifying the byzantine laws of the world of government contracts.



Steve Parry

Building sales teams, sales compensation models, sales management support, and strategic business consulting

Steve works with leaders who recognize that sales are the constraint to their company's growth, and help them understand why and what to do to drive profitable, sustainable revenue. Steve began developing his training and communications skills as a second grade teacher in Summit County, Colorado. An entrepreneur at heart, Steve left teaching to start his own business, and since then, has spent over 34 years as a business owner and in the corporate arena: in industrial relations, operations, quality management, mergers and acquisitions, training, marketing, sales and sales management. Coaching CEO's and Sales Managers is what he enjoys doing the most.



Eladia Rivera

Market research training and consulting

Eladia Rivera has 25+ years as an experienced librarian in a variety of Boulder area academic and public libraries. Her areas of expertise include business and market research, adult services management and technology training. She specializes in online searching using databases and web resources available via the SBA, SBDC and local libraries. She is committed to the discovery of free, quality online content to help entrepreneurs craft a business plan, research industries and markets and easily track emerging trends.



Carrie Schiff

Legal areas of practice - Corporate; Finance; M&A; Commercial Transactions; Corporate Compliance

Carrie Schiff is currently Chair of the Governor's State of Colorado Economic Development Commission, as well as Co-Founding Partner of Sage Law Group. Carrie Schiff is a business lawyer specializing in the representation of technology companies and their investors in corporate, securities and transactional matters. As both a seasoned business executive and outside counsel, Ms. Schiff has participated in the development and execution of commercialization strategies for a range of companies, from global multinational companies to start-ups. Ms. Schiff represents clients in a wide variety of industries, including manufacturing and supply chain, data and geospatial imagery, technology, alternative energy, e-commerce and digital gaming. Prior to co-founding Sage Law Group, Ms. Schiff was Chief Legal and Risk Officer and Chief Compliance Officer of MWH Global, Inc., a leading multinational, employee-owned civil

engineering and construction firm based in Broomfield that was acquired by Stantec Inc. Before joining MWH, Ms. Schiff served as SVP, General Counsel and Chief Compliance Officer of Flextronics International, Ltd. (Nasdaq: FLEX), one of the largest global electronics manufacturing services companies. Her past in-house experience includes serving as SVP, Corporate Development and General Counsel at USA.NET, Inc. in Colorado Springs, an email outsourcing company. Ms. Schiff came to Boulder in 1993 to open the Colorado practice of Cooley LLP, where she was a Partner. Carrie is a certified Consultant with the Boulder Small Business Development Center and a member of its Board of Directors.



David Talon

International, strategic business/marketing planning and execution, funding/pitch prep

David Talon is a business growth, strategy and execution expert with 20+ years of experience leading new domestic and international business development, setting up distribution networks, increasing top-line revenues and building cohesive teams in the USA, Latin America, Europe and Asia. David has hands-on project management experience helping to create changes in the strategies, plans, systems, and procedures to rapidly increase sales, market penetration and new business growth. David is a Certified Executive Coach with a strong understanding of Cultural Intelligence (CQ) required to adapt business practices to local and regional market considerations. He focuses on early-stage and rapidly growing small-to-medium sized businesses (\$0 – \$50 Million) with a willingness and capability to expand in both US and foreign markets. David holds an MBA in International Business with a minor in Latin American

Geopolitics and has lived in South America and Mexico.