



2026 Technology Leadership Conference

Session 7: From Data to Value: Building Enterprise Foundations for Growth

Jay Margherio
EFCG Vice President
Technology & Innovation

Tuesday, June 16, 2026



**Network: Convene Guest
No Password Required**



Experience

Vice President

Technology and Innovation
EFCG

Technology Strategy & Advisory Consultant
Accenture

Market Strategy & Finance Lead
Ioniks

Additional Experience: **Orianna Capital,**
Optima Chemical, Graham Capital

Education

M.B.A., Finance, Marketing & Strategy
NYU Stern School of Business

B.E., Chemical Engineering
Dartmouth College

EFCG Technology Practice

Technology Advisory

Tech Investment Benchmarking and Strategy
Market Analysis and Technical Due Diligence
Innovative Business Model Partner
Knowledge Management and IP
Technology Organization Design
AI Resilience Benchmarking

Advanced Analytics

Custom Analytics Advisory
Innovation Network Analysis
Forecasting and Predictive Analytics
Market and Competition Monitoring
Financial Modeling and Scenario Analysis
Forensic Analysis and Cyber Security

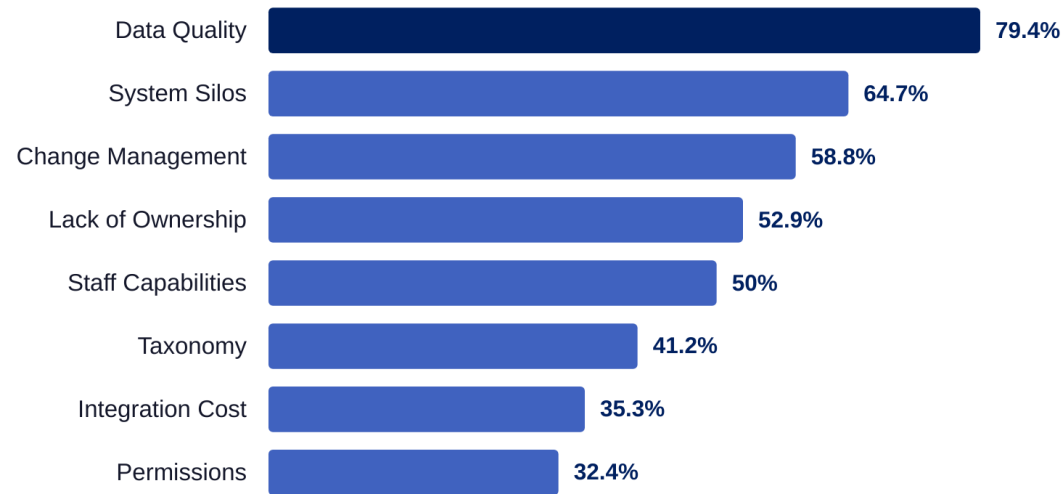
Quantitative Integration Analysis (QIA) –

Monitor Integration Velocity for Post M&A and
Org Redesigns

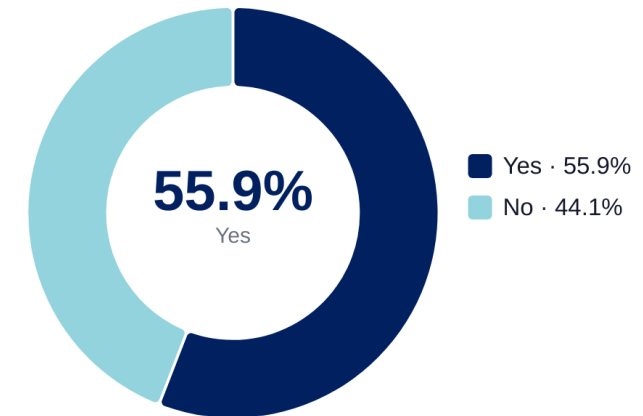
The foundations that make AI durable are not ready: Data Quality is the #1 blocker

Select results from EFCG's 2026 Technology Leadership Conference Survey

Biggest challenges to implementing a data strategy



Has a formal enterprise data strategy



Key Observations:

- **AI readiness is a data trust problem first:** Data quality is the clear #1 blocker, but the deeper issue is whether leaders, PMs, and technical staff trust enterprise data enough to stop using their own spreadsheets.
- **A data strategy is not the same as data value:** More than half of firms have a formal strategy, but strategy alone does not answer the hard questions: what data matters, who owns it, who can access it, and what business decision it should improve.

Today's Panelist: Brent Hamlin



Brent Hamlin

Experience

Infrastructure Manager
Parametrix, 2019-Present

Systems Administrator
Northwest Hardwoods, 2019

Systems Administrator
Key Methods, 2018-2019

Systems Administrator
Fuse Networks, 2015-2018

Education

Western Governors University, B.S., IT
Software

| Ownership Type | Gross Revenues | Total Employees |
|---------------------------|----------------|-----------------|
| Full ESOP | \$228M | 950 |
| End Markets % Revenues | | |

Today's Panelist: Jacob Lindsay



Jacob Lindsay

Experience

Head of Technology & Innovation
Senversa, 2021-Present

Global Director, Digital Products
Aurecon, 2016-2021

Co-Founder
Code for Australia (Partner of Code for
America), 2012-2016

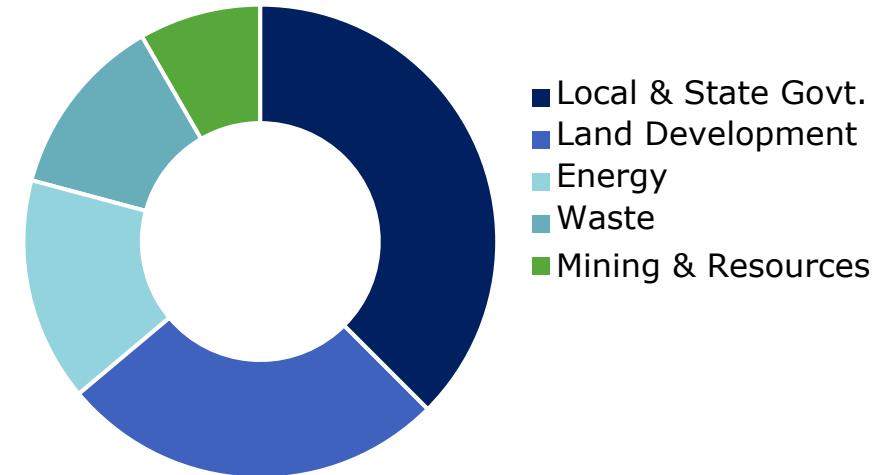
Education

RMIT Melbourne, Bachelor of Design,
Landscape Architecture (Hons)



| Ownership Type | Gross Revenues | Total Employees |
|----------------|----------------|-----------------|
| Employee-Owned | \$56M (AUD) | 180 |

End Markets % Revenues



Today's Panelist: Mike Soldan



Mike Soldan

Experience

SVP, Global Technical Solutions
Egnyte, 2024-Present

CEO
Intterra, 2023-2024

COO
Shmoop, 2019-2023

Education

University of Utah, M.S., Information Systems

University of Utah, B.S., Information Systems



Ownership Type

PE-Backed

Total Employees

1,300

Types of Products & Solutions Offered

- Document Management
- Collaboration
- AI
- Data Governance
- Data Security

Industries Served

- Architecture & Engineering
- Construction
- Life Sciences
- Financial Services

Today's Panelists



**Brent
Hamlin**

Infrastructure Manager
Parametrix

Ownership Type:
Full ESOP

Gross Revenues:
\$228M

Total Employees:
950

Primary End Market(s):
Transportation, Sewer, WW, Water
Supply



**Jacob
Lindsay**

Head of Technology & Innovation
Senversa

Ownership Type:
Employee-Owned

Gross Revenues:
\$56M (AUD)

Total Employees:
180

Primary End Market(s):
Local & State Gov., Land Development,
Energy



**Mike
Soldan**

SVP, Global Technical Solutions
Egnyte

Ownership Type:
PE-Backed

Total Employees:
1,300

Industries Served:
A/E/C
Life Sciences
Financial Services



Ask Us Questions

Jay Margherio

jmargherio@efcg.com

<https://calendly.com/jmargherio>

Share Your Feedback

We value your input! Please take a moment at the end of the day to share your thoughts on this session.



EFCG

June 15 - 16, 2026

Chicago, IL

Lunch

11:45 am – 12:30 pm

Franklin Gallery

Session 8: When Technology Drives the Deal: M&A Valuation Premiums and Post-Merger Integration Implications

12:30 pm – 1:00 pm

The Hub

Session 9: Turning Your Firm's Untapped Intelligence Into a Strategic Asset with HSO

1:00 pm – 1:20 pm

The Hub



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