



# Follow the Lead

An FTC Workshop on Lead Generation

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7:45 am

## REGISTRATION

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8:30 am

## WELCOME

**Katherine Worthman**

Attorney, Division of Financial Practices, Federal Trade Commission

## OPENING REMARKS

**Jessica Rich**

Director, Bureau of Consumer Protection, Federal Trade Commission

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8:45 am

## PANEL 1:

### Introduction to Lead Generation Marketplace and Mechanics

This panel will provide an introductory overview of lead generation, including the roles of lead generators and related entities, the mechanics of collecting and selling leads, and the potential benefits and risks associated with this activity.

#### MODERATOR:

**Evan Zullow**

Attorney, Division of Financial Practices, FTC

#### PANELISTS:

**Michael Ferree**

Director & Board Member, LeadsCouncil

**David Morgan**

Chief Revenue Officer, PerformLine, Inc.

**Paul McConville**

Chief Revenue Officer, LeadID

**Liad Wagman**

Faculty Chair & Associate Professor of Economics  
Illinois Institute of Technology, Stuart School of Business

**Jonathan Gillman**

Founder & CEO, Omniangle Technologies

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10:15 am

## **PANEL 2: Case Study on Lead Generation in Lending**

This panel will discuss how lead generation is used in the lending industry, including the use of an auctioning process known as a “ping tree” and other models. Panelists will also discuss related consumer protection issues.

### MODERATOR:

#### **Katherine Worthman**

Attorney, Division of Financial Practices, FTC

### PANELISTS:

#### **Pam Dixon**

Founder & Executive Director, World Privacy Forum

#### **John Henson**

Vice President & Head of Compliance, LendingTree, Inc.

#### **Tim Madsen**

President, PartnerWeekly LLC

#### **Glenn McKay**

Co-founder, President & CEO, Selling Source LLC

#### **Aaron Rieke**

Director of Tech Policy Projects, Upturn

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11:15 am

## **BREAK**

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11:30 am

## **PANEL 3: Case Study on Lead Generation in Education**

This panel will focus on how lead generation works in the education marketplace, similarities and differences from lending and other verticals, and consumer protection issues related to education marketing by lead generators.

### MODERATOR

#### **Brian Shull**

Attorney, Division of Financial Practices, FTC

### PANELISTS

#### **Jeff Appel**

Deputy Under Secretary of Education, U.S. Department of Education

#### **Nathan Blake**

Assistant Attorney General, Iowa Department of Justice

#### **Daryl Colwell**

Senior Vice President, Matomy Media Group

#### **Jonathan Gillman**

Founder & CEO, Omniangle Technologies

#### **David Halperin**

Attorney

#### **Amy Sheridan**

CEO, Blue Phoenix Media

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12:30 pm

**LUNCH**

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1:30 pm

**PANEL 4:**

**Overview of Consumer Protection Concerns & the Legal Landscape**

This panel will focus on the consumer protection issues raised by lead generation – as discussed in the case studies and as exist in other verticals. Panelists will also discuss the applicability of the FTC Act and other legal principles.

MODERATOR

**Sandhya Brown**

Assistant Director, Division of Financial Practices, FTC

PANELISTS

**Marty Collins**

SVP of Corporate Development, Legal & Compliance, QuinStreet, Inc.

**Pam Dixon**

Founder & Executive Director, World Privacy Forum

**Ed Mierzwinski**

Consumer Program Director, US Public Interest Research Group

**Jonathan Pompan**

Partner, Venable LLP

**R. Michael Waller**

Attorney, Division of Enforcement, FTC

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2:30 pm

**PANEL 5:**  
**Looking Ahead – Protecting & Educating Consumers**

This panel will focus on the steps both industry members and regulators can take to better protect consumers, and information and strategies for improving consumer understanding of lead generation and avoiding problematic practices.

MODERATOR

**Malini Mithal**

Acting Associate Director, Division of Financial Practices, FTC

**Patrick Eagan-Van Meter**

Financial Technology Program Specialist, Division of Financial Practices, FTC

PANELISTS

**Joseph J. Chambers**

Assistant Attorney General,  
State of Connecticut Office of the Attorney General

**Greg Gragg**

Chairman & CEO, Blue Chair, LLC

**Peter Marinello**

Vice President, Council of Better Business Bureaus, Inc.

**Lisa McGreevy**

President & CEO, Online Lenders Alliance

**David Morgan**

Chief Revenue Officer, PerformLine, Inc.

**Kim Taylor**

Co-Founder & CEO, Ranku, Inc.

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3:45 pm

**CLOSING REMARKS**

**Malini Mithal**

Acting Associate Director, Division of Financial Practices, FTC

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