

Operating Partners Human Capital Forum Virtual Experience

May 13, 2021 | Eastern Time (ET)

Virtual Event Available Anywhere

Operating Partners Human Capital Forum Agenda 2021

9:50 Human capital operating partners think tank (invitation-only)

Invitation-only think tank for full-time PE and VC operating partners and talent partners. This closed-door virtual room will allow you to learn and share best practices in human capital, talent management and recruiting operations. It will uncover this year's new challenges and opportunities in human capital. The think tank will allow you to submit topics to be introduced by the facilitators and discussed in the room.

THINK TANK ROOM 1

Facilitators: **Kelly Carlson**, Managing Director, Head of Talent, **STG Partners**

Katie Solomon, Managing Director, Talent Management, **Genstar Capital**

THINK TANK ROOM 2

Facilitators: **Kristen Chang**, Managing Director, Human Capital, **LLR Partners**

Sean Dougherty, Vice President, Talent and Operations, **Inverness Graham Investments**

10:55 PEI's welcome and opening remarks

11:00 Human capital best practices across the entire investment lifecycle

- How is human capital evolving and what are the implications for private equity?
- Human capital due diligence: operating partner lessons learned
- Senior team alignment on strategic direction to execute the investment thesis
- Playbooks in forming and developing human capital strategies throughout the various stages
- How to think about creating value through human capital in the first 100 days
- Working with the CHRO to elevate value creation initiatives
- Managing relationships with management teams virtually for them to own the value creation plan
- When, how, and why to deploy assessment during the investment cycle?
- Talent management best practices for the exit

Moderator: **Ted Bililies**, Managing Director and Chief Talent Officer, **AlixPartners**

Panelists: **Abhishek Kapur**, Managing Director, **KKR**

Christopher Kim, Senior Vice President, **Platinum Equity**

Melissa Mounce, Managing Director, Leadership Talent and Diversity, **GTCR**

Alice Mann, Operating Partner, Human Capital, **Blue Wolf Capital Partners**



11:40 Recruiting CEOs for a post pandemic economy

- How leading PE Firms are rethinking their CEO hiring
- Author of "Evidence-Based Recruiting" discusses what we can learn from 100 years of research on which types of CEOs will be successful in turbulent times
- Private equity-CEO alignment best practices in the current environment
- Join a discussion with panelists with experience recruiting successful executives

Moderator: **Atta Tarki**, CEO and Managing Director, **ECA Partners**

Panelists: **Elizabeth Burgess**, Partner, **Bridges Fund Management**

Ben Holzemer, Partner, Global Head of Human Capital, **TPG Global**

Steven Maxwell, Senior Vice President, Portfolio Human Capital, **Audax Group**

Glenn Stevens, Partner, Talent Management, **Apollo Global Management**

Ann Ruble, Operating Partner, **Two Sigma Impact**

12:20 Training and development for the modern CFO: setting CFOs up for success

- Identifying and attracting top CFO talent: what is your greatest challenge when it comes to recruiting brilliant portfolio CFOs?
- How has the portfolio company CFO role evolved and what makes an ideal private equity CFO?
- First-hand success stories in looking at the CFO-CEO-Operating Partner partnership
- Working with the CFO in today's current environment: looking at challenges and opportunities
- CFO training and development for transformation

Moderator: **Richard Jenkins**, Managing Director, **Alvarez & Marsal**

Panelists: **Cordelia Dolan**, Talent Director, **Inflexion Private Equity**

Benjamin Humphreys, Senior Operating Executive, **Monomoy Capital Partners**

Nicki Lambropoulos, Operating Partner, **Cold Bore Capital Management**

Howard Reba, Head of Portfolio Finance, **CI Capital Partners**

1:00 Networking lunch and extended live Q&A interactive discussions

(Please use this time as an opportunity to join one of the interactive discussions, or connect with conference attendees and sponsors via the video chat function one-on-one or as a small group)

INTERACTIVE DISCUSSION 1:

Human capital best practices across the entire investment lifecycle

INTERACTIVE DISCUSSION 2:

Recruiting CEOs for a post pandemic economy

INTERACTIVE DISCUSSION 3:

Training and development for the modern CFO: setting CFOs up for success

1:00 Women in PE & VC portfolio operations lunch (invitation-only)

This closed-door discussion will explore what it's like being a woman in PE and VC portfolio operations:

- What are the issues causing a disparity in genders?
- Exploring career paths, development, and how to position yourself as female leaders
- Is your firm focused on women's leadership at portfolio companies?
- Does your firm have any specific programs, leadership coaching and assessments geared towards promoting women's leadership?
- Are there any changes in recruiting that will create a more equal playing field?
- Looking at trends and stats in gender in PE and VC

Facilitators: **Coley Florance**, Head of Talent, **Spectrum Equity**

Samantha Adams, Managing Director, Talent, **Berkshire Partners**

Debra Somers, Director, Portfolio Recruitment, **Warburg Pincus**



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BREAKOUTS

1:40 **Track 1: Human capital due diligence—the missing ingredient in pre-transaction playbooks**

- Understanding the COVID-accelerated trend of more rigorous human capital due diligence, and what the future holds
- Measuring the people impact in each deal—how human capital dynamics influence valuation
- How leadership/team quality can derail value creation efforts, and how to identify and mitigate those risks
- Drawbacks of traditional leadership assessments versus next generation approaches that support context-driven individual and team success

Moderator: **Matt Brubaker**, CEO, **FMG Leading**

Panelists: **Andy Caine**, Partner, Human Capital, **Frazier Healthcare Partners**

David Gibson, Operating Partner, **WindRose Health Investors**

Adam Stein, Founding Partner, **LightBay Capital**

1:40 **Track 2: The next level of talent recruitment, retention, & assessment: best practices in 2021 and beyond**

- With recruiting talent anywhere: what will the future recipe look like?
- What is the biggest hindrance to recruiting and retaining top tier talent in your portfolio companies in this environment?
- Regarding retention new research suggests the one in four knowledge workers will leave their jobs post pandemic due to burnout, largely driven by increased workload and job stress: what are you doing to get in front of this?
- What will the future role/structure of the human capital operating partner and talent partner look like?
- At what levels do you get involved with talent and leadership selection and assessment in the portfolio?
- Many VCPs look to improve portfolio company cost structures? How are you thinking about on demand talents as a way of growing back capacity and at the same time, variabilizing cost structure?
- Assessments: when do you do it? how do you do it? what do you use? how do you think about AI, data/big data, tools for it?
- Workforce analytics: uncovering initiatives in people data science

Moderator: **Tim Sanders**, Vice President of Customer Insights, **Upwork**

Panelists: **Emily Azevedo**, Operating Partner, Talent, **Mainsail Partners**

Kelly Carlson, Managing Director, Head of Talent, **STG Partners**

Jon Davies, Managing Director, Head of Talent, **Lightyear Capital**

BREAKOUTS II

2:20 **Track 3: Human capital M&A integration: critical steps for PE firms and their portcos**

- Employee retention during M&As: key takeaways
- Dissecting the most important human capital elements and challenges in carveouts and M&As
- Assessing leadership and cultures effectively in M&As
- Integration best practices: post-close, and in the first 100 days
- Working with the CHRO in M&As: best practices

Moderator: **Jennifer Busse**, M&A Integration and Separation Leader, **RSM**

Panelists: **Ashley Day**, Chief Talent Officer, **CI Capital Partners**

Merche del Valle, Managing Director, Chief Talent Officer and Chief HR Officer, **Grain Management**

Joelle Marquis, Senior Partner - Human Capital, **Arsenal Capital Partners**

Adam Miller, Consultant, Global Talent Management, **The Riverside Company**



2:20 Track 4: Healthcare navigation: improving lives, creating value, driving EBITDA

Healthcare and benefits can become a source of holistic value creation rather than an enemy of EBITDA within portfolio companies. The key: employee and provider engagement strategies that drive outcomes while reducing costs. Hear from a Berkshire Hathaway subsidiary's HR leader who's using healthcare navigation and care coordination to bend her company's cost trend and boost employee satisfaction, all within a highly complex benefits environment. Learn from a PE executive why independent navigation is as beneficial to the bottom line as it is to the health of employee populations. Get thought-provoking insights on why this type of benefits innovation has never been more essential to portcos and P&Ls given competition for talent and an expected surge of postponed care caused by the pandemic.

- Proactively engaging employees and providers to drive cost avoidance
- Improving employees' benefits experience within collective-bargaining constraints
- Exploring healthcare navigation as a value creation best practice across the portfolio

Moderator: **Todd Grove**, Vice President, Private Equity, **Quantum Health**

Panelists: **Michael Frain**, Senior Vice President, Shared Services, **Warburg Pincus**
Katie Gausepohl, Director, Benefits and Payroll, **NetJets**

3:00 Networking break and extended live Q&A interactive discussions

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DISCUSSION 1:

Human capital due diligence—the missing ingredient in pre-transaction playbooks

INTERACTIVE

DISCUSSION 2:

The next level of talent recruitment, retention, and assessment: best practices in 2021 and beyond

INTERACTIVE

DISCUSSION 3:

Human capital M&A integration: critical steps for PE firms and their portcos

INTERACTIVE

DISCUSSION 4:

Healthcare navigation: improving lives, creating value, driving EBITDA

BREAKOUTS III

3:30 Track 5: The long journey for diversity: an inside look at private equity initiatives and challenges

- Exploring the challenges of finding diverse talent and what must be done
- What are you doing at your companies to tackle diversity and open dialogue? What specific initiatives/programs have you taken that were successful?
- How can PE firms create cultures at their portfolio companies that will ensure diversity and inclusion initiatives have the desired impact?
- KPIs for diversity and measuring effectiveness: how are companies leveraging data to augment their efforts with portfolio companies?
- Diversity and leadership: how are you thinking about diversity of boards?
- Building diversity from within, not just at the top

Moderator: **Angela Nalwa**, Managing Director, HR Transformation Solution Leader, **Grant Thornton**

Panelists: **David Beuerlein**, Operating Partner, **Khosla Ventures**

Neel Bhatia, Operating Partner, Talent and ESG, **Arcline Investment Management**

Natalie Ings, Managing Director, Portfolio Solutions, **Lightyear Capital**

Kate Migliaro, Principal, Talent Management and Organizational Effectiveness, **Apollo Global Management**



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3:30 **Track 6: Boards: navigating the next normal**

- The evolving board: ESG and diversity imperatives
- The pragmatic board approach to cyber
- The secret to the best CEO-Board partnerships
- The role of the OP on the board: should they always have a seat?
- Influencing execution: are KPIs enough?
- Optimizing compensation for the board and management

Moderator: **Rick DeRose**, Managing Partner and Co-Founder, **Acertitude**

Panelists: **Susan Clark**, General Partner, Portfolio Operations, **TCV**

Peter Deegan, Senior Vice President, Human Capital, Operating Advisory Group, **Comvest Partners**

Debra Somers, Director, Portfolio Recruitment, **Warburg Pincus**

Michael Song, Managing Director, Portfolio Operations, **Providence Equity**

4:00 **Next generation commercial leadership—how the game has changed**

- Looking at the different role of senior sales executives in the near future
- New skills requirements for senior sales leaders – digital, analytics, team-based selling, etc.
- Changes required to source, onboard and assess sales management in the changed environment
- Measuring current senior sales leaders against these new capabilities

Moderator: **Brad Wilsted**, Co-founder and Senior Managing Director, **Blue Ridge Partners**

Panelists: **Amy Kramer**, Operating Partner, **Level Equity**

Agnes Krygier, Principal, Portfolio Operations, **GI Partners**

Michael Monagle, Principal, Portfolio Operations, **Providence Equity**

4:30 **The future of work: top challenges and opportunities for HR teams in switching to a remote-first work environment**

Remote work is here to stay. According to a survey, 54 percent of professionals hope to continue working remotely after the pandemic. This means employees could potentially take their work wherever they want—and even adopt a nomadic lifestyle. Companies must be ready to fully embrace this reality and dedicate resources to create a productive remote work environment for their team. Here we will look at immediate challenges of supporting your existing workforce in a remote-first world and learn best practices to managing remote teams.

- Have your companies fully transformed themselves to thrive in a world where anyone can work from anywhere?
- Will your team members have the right to live and work where they have relocated?
- Do you have the infrastructure and policies in place to support employee involvement in a remote work environment?
- How are your HR teams looking to design a remote employee lifecycle that results in happy teams and productive companies? Are there gaps in your current approach?
- How can HR teams support professional growth in the company remotely?
- What compliance challenges do HR professionals need to deal with when employees relocate?
- How should HR teams work to maintain and grow a unique company culture within their distributed team?

Moderator: **Emily Boynton**, Vice President Human Resources, **Globalization Partners**

Panelists: **Merche del Valle**, Managing Director, Chief Talent Officer and Chief HR Officer, **Grain Management**

Jamie Jacobs, Director, Human Capital, **American Securities**

Hannah Johnson, Head of Human Resources, **Thoma Bravo**



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5:00 **Extended live Q&A interactive discussions**

(Please use this time as an opportunity to join one of the interactive discussions)

**INTERACTIVE
DISCUSSION 1:**

The long journey for diversity: an inside look at private equity initiatives and challenges

**INTERACTIVE
DISCUSSION 2:**

Boards: navigating the next normal

**INTERACTIVE
DISCUSSION 3:**

Next generation commercial leadership - how the game has changed

**INTERACTIVE
DISCUSSION 4:**

The Future of work: top challenges and opportunities for HR teams in switching to a remote-first work environment

5:30 **Conference ends**

