

Operating Partners Human Capital Forum New York 2022

March 30-31
Convene, 151 W 42nd St, New York

Operating Partners Human Capital Forum 2022 Agenda

Day 1: Wednesday, March 30

7:30-9:00 Registration and breakfast

8:00	Think tanks for full-time operating partners (invitation-only)	
	<p>Invitation-only think tank for full-time PE and VC operating partners and talent partners. This closed-door room will allow you to learn and share best practices in human capital and talent management for PE portfolio operations. The think tank will also allow you to submit topics to be introduced by the facilitators and discussed in the room. Please select one of the rooms based on how long you have been in private equity:</p>	
	<p>Room 1: Emerging Human Capital Operating Partners and Talent Partners (1-2 years in PE)</p> <p>Facilitators: Kristen Chang, Managing Director, Human Capital, LLR Partners Camille DeLaite, Operating Partner, Talent, Charlesbank Capital Partners</p>	<p>Room 2: Advanced Human Capital Operating Partners and Talent Partners</p> <p>Facilitators: Kristin Schroeder, Operating Partner, Talent, Welsh, Carson, Anderson & Stowe Debra Somers, Senior Vice President, Portfolio Recruitment, Warburg Pincus</p>

9:00 PEI's welcome and chairman's opening remarks

Chairman:

Tim Sanders, Vice President, Client Strategy, **Upwork**

9:10	Talent retention and the "Great Resignation" — how the game has changed
	<ul style="list-style-type: none"> • Exposing the real challenges around employee retention in today's environment • Talent retention best practices in an increasingly fluid/mobile workforce: what needs to evolve, and what legacy best practices will always hold true? • What is being done to retain talent in advance and not just to react • Developing effective retention strategies in looking at all levels in the pyramid • How to win in a highly competitive market: understanding workforce trends and turnover costs • Balancing benefit optimization with retention • Where are we headed to? How long can this go on for? <p>Moderator: Kate Bullis, Managing Partner, SEBA Executive Search</p> <p>Panelists: Christopher Kim, Principal, Platinum Equity Danie Levy, Principal, The Carlyle Group Alice Mann, Partner, Human Capital, Sentinel Capital Partners Allison Walker, Chief Talent Officer, FTV Capital</p>



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9:50	Amplifying the human capital and talent function in PE: comparing models <ul style="list-style-type: none">• Comparing teams, networks, and resource structures: who do you rely on most for human capital expertise? How do you get the right team structure in place?• How operating partners come into play: what are the functions/roles on your team?• How do you influence your deal team — what is the ROI of human capital?• How to drive EBITDA by supporting the overarching vision of where the company needs to head towards• How to map the talent evolution, talent to value models, meshing talent with your value creation models• Where/when to be prescriptive vs. allow the portco to lead• Amplifying the value proposition of human capital: how have models evolved and what will they look like moving forward? <p>Moderator: Dan Hawkins, CEO, Summit Leadership Partners</p> <p>Panelists: Andy Caine, Partner, Human Capital, Frazier Healthcare Partners Angela Geffre, Chief Human Resources Officer, Sun Capital Partners Natalie Leone, Managing Director, Portfolio Talent, Centerbridge Partners Kate Migliaro, Principal, Talent Management and Organizational Effectiveness, Apollo Global Management</p>
10:30	Private equity-leadership team alignment and the next generation of CEOs <ul style="list-style-type: none">• How leading PE Firms are rethinking their CEO hiring in the current environment• What does the next generation CEO look like? And what can be done to identify that next generation and coach them?• How do you do good CEO performance reviews: what is the right process for it• Supporting new CEOs as well as CEOs new to PE• Setting up productive relationships with leadership teams across the deal lifecycle to help them operate at full power• Leadership in times of disruption: uncovering challenges in different industries• Exploring the unique tensions faced by PE-backed CEOs but rarely discussed• If you had to hire a new CEO today what profile and characteristics would you prefer? <p>Moderator: Ted Billilies, Managing Director and Chief Talent Officer, AlixPartners</p> <p>Panelists: Amanda Good, Partner, Global Head of Value Creation, Searchlight Capital Partners John Knapp, Operating Director, Talent, Berkshire Partners Pericles Mazarakis, Managing Partner, TriSpan Bryan West, Head of Talent, Resurgens Technology Partners</p>

11:10 **Networking break**



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Breakout - Series I

11:40	Track 1	Track 2
	<p>Critical dimensions in talent due diligence</p> <ul style="list-style-type: none"> • Explaining the dynamics of human capital diligence and how best to partner with investment teams • What role does human capital assessment/evaluation play in your firms overall due diligence processes? • In our current environment, what particular people dynamics do you pay attention to and track pre-transaction? What are the analytics you are using? • Refining the toolkit: specifically addressing the broad range of deal dynamics which may dictate your approach in developing a human capital plan • Fully understanding the human capital risks: how do you identify red flags during diligence? • Can you share any “horror” stories of an investment thesis that went askew due to people issues? • Can you share how the pandemic has re-shaped the way you approach due diligence? • Understanding turnover costs and right sizing it during diligence <p>Moderator: Will Busch III, Managing Director, Growth Strategies, FMG Leading</p> <p>Panelists: Thomas Caruso, Partner, Portfolio Operations, Guardian Operations and Advisory Company, Guardian Capital Partners Courtney Hagen, Chief Talent Officer, Littlejohn & Co. Ben Holzemer, Partner, Global Head of Human Capital, TPG Global Chris Trendler, Managing Director, Head of Portfolio Talent, Madison Dearborn Partners</p>	<p>Grasping the lower and mid-level talent execution plan</p> <ul style="list-style-type: none"> • Looking at the challenges and opportunities of mid and lower-level hires • Dos and don'ts post deal • Analyzing the different levels in a company and how your PE firm gets involved • Post-COVID talent acquisition, development, assessment, and retention for the lower and mid-level • In our current environment, what particular people dynamics do you pay attention to? • Challenges and opportunities of virtual/hybrid workforces <p>Moderator: Rich Coffey, Director, Strategic Partnerships, Globalization Partners</p> <p>Panelists: Emily Azevedo, Operating Partner, Talent, Mainsail Partners Neel Bhatia, Operating Partner, Talent, Arcline Investment Management Jamie Jacobs, Director, Human Capital, American Securities</p>



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Breakout - Series II

12:20	Track 3 100-day talent action plans: starting your value creation journey	Track 4 Culture and strategy to accelerate growth
	<ul style="list-style-type: none"> • How to think about creating value through human capital in the first 100 days • What to do and what not to do in the first 100 days post close • What talent levers do you consider to be top priorities for generating value within the portfolio company? What has become more urgent? • How do you engage/support in starting your journey with the portfolio company? • Understanding organizational culture as part of 100-day plans • Comparing different strategies post transaction <p>Moderator: Katie Marchetti, Managing Director, BluWave</p> <p>Panelists: Kate Berkeley, Managing Director, Talent Acquisition, Human Capital Group, Gryphon Investors Ashley Day, Operating Partner – Human Capital, FFL Partners Robert Murray, Vice President, Portfolio Human Capital, Audax Private Equity Sean Turner, Director, Portfolio Operations, GI Partners</p>	<ul style="list-style-type: none"> • How do you evaluate a prospect’s culture? • Understanding the challenges and barriers of a misaligned culture and unclear strategy • Uncovering key elements of organizational culture as part of 100-day plans • What tools do you use internally at your firm: how do you support culture? • How investors and operators assess, align, and activate both culture and strategy to ensure momentum • Establishing clear roadmaps for the organization and help people understand where the company is headed • Designing environments that support the new strategy and promote high performance in people • Looking at how culture plays a part when it comes to retention and compensation <p>Moderator: Dwight Cooper, CEO, Hueman</p> <p>Panelists: Tracey Abbott, Senior Operating Lead, Partners Group Cécile Dutheil, Head of Human Capital Portfolio, Triton Partners Garry Fielding, Senior Operating Advisor, Human Capital, Francisco Partners Consulting</p>

1:00 **Networking lunch**



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Breakout - Series III

2:00	Track 5 Portco retention strategy: harmonizing benefit platforms, reducing costs, and improving employee morale	Track 6 Workforce analytics: leveraging data science with talent/portfolio performance
	<ul style="list-style-type: none"> What are some innovative things HR leaders are doing when it comes to healthcare and employee engagement? Balancing growth through M&A during a pandemic with increased support to employees What is being done to retain talent in advance – while reducing bottom line costs How to combat the current high inflationary environment through mitigating excessive medical trend and labor inflation <p>Presenters: Todd Grove, Vice President, Private Equity, Quantum Health Christopher Kim, Principal, Platinum Equity</p>	<ul style="list-style-type: none"> What are the leading human capital indicators of performance? To what extent are you using people analytics to understand your business, make strategic decisions, and drive business processes across the investment lifecycle? AI, KPIs, metrics and data science for talent development and assessments Tools and innovations in “people data science” to uncover hidden patterns <p>Panelists: Javier O’Neil-Ortiz, Talent Systems and People Analytics, B Capital Group Tina Tran, Director, Incline Equity Partners Allison Walker, Chief Talent Officer, FTV Capital Curt Witte, Partner, Head of Growth Factors, Bregal Sagemount</p>

Breakout - Series IV

2:40	Track 7 Operating partner-CHRO dynamics: alignment, expectations, and impact	Track 8 Accelerating workforce transformations through digital and human forces
	<ul style="list-style-type: none"> Working with the CHRO to elevate value creation initiatives: how do you support them and what do they need from PE? Assessing the CHRO for that company: how much can they handle? What is the role of the CHRO in the portco? Working with the CHRO in executing the 100-day plan Leveraging CHROs across the portfolio: what are the key initiatives to focus on? Helping CHROs think more strategically to be aligned in the value creation plan to execute it How can the CHRO influence the CEO and CFO for alignment of talent? How can you help your CHRO to be a more influential leader? What are some creative and innovative things HR leaders are doing when it comes to standards, processes, and functions? 	<ul style="list-style-type: none"> Understanding workforce development in the age of digital The digital workplace: digitizing physical workplaces smarter using AI, IOT, and other key technologies Overcoming the challenges of scarcity in tech talent: attracting, retaining, and supporting tech talent in the current environment Building a digital culture at your companies Sharing examples of how the pandemic accelerated workforce transformations at your companies What newly created digital roles have you created at your companies? What tech skillsets will be required in the digital future? <p>Moderator: Tony Buffum, Vice President of HR Client Strategy, Upwork</p>



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<p>Moderator: Mugdha Narasimhan, Managing Director, Entromy</p> <p>Panelists: Tanya Hayes, Partner, Human Capital and ESG, Frazier Healthcare Partners Joe McDougall, Managing Director, TC Operating Partners, Trive Capital Michelle Nasir, Chief Talent Officer, Arsenal Capital Partners Michael Song, Managing Director, Portfolio Operations, Providence Equity Partners</p>	<p>Panelists: David Beuerlein, Former Operating Partner, Khosla Ventures Katie Czerepak, Head of Talent, Tech Opportunities, Bain Capital Kyle Roemer, Managing Director, Incline Equity Partners Jenna Sigman, Executive Vice President, Insight Partners</p>
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3:20 **Networking break**

Interactive Working Group Series I

These deep dive discussions designed solely for operating partners will allow the audience to join an interactive discussion with designated facilitators:

3:45	Interactive Working Group 1 (for operating partners only) Training and coaching management teams effectively: operating partners/talent partners share their thoughts	Interactive Working Group 2 (for operating partners only) Talent assessments for success: operating partners/talent partners share their thoughts
	<ul style="list-style-type: none"> • Training the management team about how to work with private equity • What is your view on the value of executive development for the management team such as executive coaching, education, 360 feedback, and other performance feedback? • Sharing stories about coaching and career developments within your portcos • Coaching: how are you doing it specifically with CEOs and CFOs • What works and what doesn't when it comes to coaching portfolio company executives? • How is investing in the management team's development worth the time and money? What do you prioritize? <p>Facilitators: Jennifer Busse, Management Consulting – Director M&A Integration and Separation, RSM US Marni Rozen, Director, RSM US</p>	<ul style="list-style-type: none"> • Sharing lessons learned: Do you have the right A players in key roles? • Assessing leadership and talent: what are you doing that is correlating with performance? What is worthwhile and what is not worthwhile? When are you doing it, how do you know it is making a difference? Does the data prove it is making a difference? • Pre-hire leadership assessments, how to get the deals teams up to speed in assessing the management teams; how to improve the assessment process • What have been the implications on how you assess leadership and talent capability (for existing and new investments) amidst continued uncertainty introduced by covid-19? • How often are you assessing management teams throughout the lifecycle (due diligence through exit)? • How are you tracking certain metrics to determine the value creation gained through human capital? If so, which metrics? <p>Facilitator: Alan Foster, Partner, Head of Private Equity, ghSMART</p>



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Interactive Working Group Series II

These deep dive discussions designed solely for operating partners will allow the audience to join an interactive discussion with designated facilitators:

4:30	Interactive Working Group 3 (for operating partners only) The future of work: operating partners/talent partners share their thoughts	Interactive Working Group 4 (for operating partners only) The amazing impact of proper benefits governance: PE thought leaders share insights and results
	<ul style="list-style-type: none"> • How to effectively organize in hybrid work models; have your companies fully transformed themselves to thrive in the current work environment? • How are GPs shaping portco policies and/or best practices for “return to office”? • What considerations must you consider with regard to giving employees work location flexibility? • Scrutinizing the next generation of workforce: what work models will work best? How do you position yourself as a place where people want to work? What future plans are you thinking about in looking at where we are headed to in the years to come? • Looking at top challenges and opportunities for HR teams • How can HR teams support professional growth in the company remotely? • How should companies maintain and grow a unique company culture? • How are you supporting your potcos, how are you thinking about? <p>Facilitators: Patrick Petitti, Co-Founder and CEO, Catalant Curt Witte, Partner, Head of Growth Factors, Bregal Sagemount</p>	<ul style="list-style-type: none"> • Benefits: fund major HR and new benefits initiatives with the power of plan governance • What is your playbook on pre- and post-acquisition benefits analysis? • Most thinking on benefit plans is archaic and destined for poor results • Incentives: what role does it play in driving transformation and the value creation agenda? • Employee’s financial risk in benefits • Investing in human capital resources: implementing processes/systems to better manage third parties that interact with your portfolio companies as well as your own firm • What to insource vs. outsource? <p>Facilitators: Eric Krieg, Managing Director, Risk International John Weaver, Senior Director, Risk International</p>

5:15 End of day 1 and networking cocktail reception



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Operating Partners Human Capital Forum 2022 Agenda

Day 2: Thursday, March 31

7:30-9:25 Registration and breakfast

7:45	Human capital deep dive breakfast discussion (for operating partners only): The “Great Resignation” and the “War for Talent”	
	<p>This deep dive discussion designed solely for operating partners will allow the audience to join an interactive discussion with designated facilitators:</p> <ul style="list-style-type: none"> • How CEOs must lead and communicate in a hypercompetitive environment for talent • It takes a village: building an effective leadership team to successfully navigate multiple disruptions while attracting and retaining talent • Using your company’s purpose and mission to attract the right kind of employees • Understanding the multi-generational workforce and using differing expectations and values to grow your talent base • Leveraging your company’s culture to become a talent magnet • Accelerating your DE&I strategy to strengthen your talent retention <p>Facilitator: Parmesh Bhaskaran, Managing Director, AlixPartners Ted Bililies, Managing Director and Chief Talent Officer, AlixPartners</p>	
8:30	Think tanks for full-time operating partners: Comparing operating partner human capital models — value creation war room (invitation-only)	
	<p>This closed-door discussion will allow you to learn and share best practices of successful human capital and talent operational models. The think tank will also allow you to submit topics in advance to be covered in the room in looking at what the future holds for PE talent value creation models. Please select one of the two rooms based on portfolio company size:</p>	
	<p>Think Tank Room 1: Mid-Market Facilitators: Dana Allen, Managing Director, Talent, Gauge Capital Giles Whiting, Operating Partner, Verdane</p>	<p>Think Tank Room 2: Large Cap Facilitator: Ben Holzemer, Partner, Global Head of Human Capital, TPG Global</p>

9:25 **Chairman’s welcome**
Chairman:
Tim Sanders, Vice President, Client Strategy, **Upwork**



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9:30	What makes a great talent partner/human capital operating partner in PE? <ul style="list-style-type: none">• Building your role as a high-quality talent partner: how do you support your firm and your portfolio companies• PE talent partner market trends: driving better and faster execution• When does your firm engage the talent partner?• Linking the role to value creation: uncovering specific tactical talent partner value creation plans• Talent partner-deal team dynamics: identifying opportunities and risks• Establishing playbooks of evaluation, resources, and support at different stages <p>Moderator: Jan Jamrich, CEO, Entromy</p> <p>Panelists: Kelly Carlson, Managing Director, Head of Talent, STG Partners David Cohen, Managing Director, Human Capital, Kelso & Company Merche del Valle, Managing Director, Chief Talent and Chief HR Officer, Grain Management Steven Maxwell, Senior Vice President, Portfolio Human Capital, Audax Private Equity</p>
10:10	Recruiting optimization: advanced strategies in talent acquisition <ul style="list-style-type: none">• What does the recruiting climate look like for you in scrutinizing risks, challenges, costs, and opportunities?• What are you doing at the lower, mid-level and senior level of talent?• What criteria are you using? What's working and what is not?• Recruitment and alignment: what do you need to know to confidently hire the right top people and ensure alignment? How is there room for them to get better?• How has the remote-first mindset impacted your hiring plans?• Impactful trends, tools, and technologies for recruiting• Uncovering challenges in recruiting diverse talent <p>Moderator: Scott Jacobs, Partner, Acertitude</p> <p>Panelists: Wes Cole, Portfolio Talent Lead – GS Value Accelerator, Goldman Sachs Ben Passafuime, Vice President, Alpine Investors Glenn Stevens, Partner, Talent Management, Apollo Global Management</p>

10:50 **Networking break**



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Interactive Working Group Series III

These deep dive discussions designed solely for operating partners will allow the audience to join an interactive discussion with designated facilitators:

11:10	Interactive Working Group 5 (for operating partners only) The long journey for diversity: sharing challenges and initiatives in PE	Interactive Working Group 6 (for operating partners only) The long journey for diversity: sharing challenges and initiatives in PE
	<ul style="list-style-type: none"> • DE&I programs: what are you doing and what is actionable? How do you build diversity from within and not just at the top? • What are the challenges in finding diverse talent and what must be done? • Looking at initiatives from different PE firms: what has been successful and what has not? • Operationalizing it and interfacing with portco leaders: what best practices can you share regarding advising management teams at the portco levels? What goals do you set for the portfolio companies relative to D&I? • How can PE firms create cultures at their portfolio companies that will ensure D&I initiatives have the desired impact? • Understanding the different stages of DE&I • What is holding PE back from achieving diversity? • How does the industry define success? What are LPs looking for? What type of data are LPs requesting? • Diversity and leadership: what can be done better? How are you thinking about diversity of boards? • KPIs and data to measure effectiveness; how are companies leveraging data to augment their efforts with portfolio companies? <p>Facilitator: Jenny Machida, Partner, PwC</p>	<ul style="list-style-type: none"> • DE&I programs: what are you doing and what is actionable? How do you build diversity from within and not just at the top? • What are the challenges in finding diverse talent and what must be done? • Looking at initiatives from different PE firms: what has been successful and what has not? • Operationalizing it and interfacing with portco leaders: what best practices can you share regarding advising management teams at the portco levels? What goals do you set for the portfolio companies relative to D&I? • How can PE firms create cultures at their portfolio companies that will ensure D&I initiatives have the desired impact? • Understanding the different stages of DE&I • What is holding PE back from achieving diversity? • How does the industry define success? What are LPs looking for? What type of data are LPs requesting? • Diversity and leadership: what can be done better? How are you thinking about diversity of boards? • KPIs and data to measure effectiveness; how are companies leveraging data to augment their efforts with portfolio companies? <p>Facilitator: Min Matson, Director, PwC</p>



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Breakout - Series V

11:50	Track 9 PE portco HR case study: rapid HR transformation for agility, ops cost efficiency and improved talent	Track 10 Uncovering the organizational design playbook
	<p>Join a fireside chat with Kevin Chase and Tom Fountain to learn about the HR/HCM transformation at BlueTriton (formerly Nestle Waters) this past year after they were acquired by One Rock Capital and engaged strategic partner, AspireHR, to replace, modernize and streamline their full stack of HCM systems in less than 8 months.</p> <p>The immediate results and benefits you'll hear about range from:</p> <ul style="list-style-type: none"> • Labor efficiencies through automation, improved employee user experience, application consolidation, operating cost reductions, increased agility for future M&A and strengthened capabilities to acquire new talent • How to take this model and scale it for future PE acquisitions at your portfolio companies while positioning HR to be a strategic enabler for future business growth <p>Presenters: Kevin Chase, CEO, AspireHR Thomas Fountain, Operating Partner, One Rock Capital Partners</p>	<ul style="list-style-type: none"> • How prescriptive are you on the org design? How do you do it from day 1 and how do you set it, who is involved? • Tracking the first milestones: how do you get there and how do you scale? • Exploring structures and trends in organizational effectiveness to successfully execute your business strategy • Looking at the future: how to optimize how your organizations are functioning • How are skills evolving and how is this affecting the process? What types of jobs are needed and what are the capabilities required for those jobs? • Designing for growth: what resources can you use and how do you do it? • What should you be looking at from an org design point of view when you are approaching exit? <p>Moderator: Marni Rozen, Director, RSM US</p> <p>Panelists: Cécile Dutheil, Head of Human Capital Portfolio, Triton Partners Jimmy Holloran, Principal, ParkerGale Capital Amy LoPiccolo, Vice President, Leadership and Talent, B Capital Group Ann McCloskey, Operating Principal, Accel-KKR</p>



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12:30	Boards: Composition, optimization, and effectiveness
	<ul style="list-style-type: none">• Composition and construction: how do you get more value of out of boards?• Board structure: where do certain human capital elements come into play here?• Board effectiveness: What is the secret to the best board/CEO relationships? How does a capable board operate? What is your role in it?• Should operating partners be on boards?• Diversity of boards• What initiatives are you driving for women on boards across portcos? What can be done?• Board compensation: uncovering the variety of compensation structures to optimize board participation• What kind of emphasis is being placed on human capital metrics at the boardroom? <p>Panelists: Mark Herther, Director, Operations and Administration, The Riverside Company Mia Jung, Talent Partner, Welsh, Carson, Anderson & Stowe Lane McDonald, Managing Director, OMERS Private Equity Kathryn Seni, Former Talent Operating Partner</p>
1:10	Chairman’s closing remarks and networking lunch
1:10	Women in PE & VC portfolio operations lunch (invitation-only)
	<p>This closed-door discussion will explore what it’s like being a woman in PE and VC portfolio operations:</p> <ul style="list-style-type: none">• 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 <p>Facilitators: Kate Migliaro, Principal, Talent Management and Organizational Effectiveness, Apollo Global Management Kristin Brown Patrick, Senior Operating Partner, Human Capital, New State Capital Partners</p>
2:10	End of conference



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