

Operating Partners Forum: Europe London 2022

Operating Partners Forum: Europe

The largest European event for private equity value creation

11-12 May

10 May

Pre-event Operating Partners Cocktail Reception

Day one: 11 May

08:30

Introduction from PEI

Charles Gould, Head of Event Production, **PEI Media**

08:35

Chairpersons opening remarks

08:45

Developing a world class value creation team

- Comparing different operating models and what works
- When does it make sense to do stuff in-house vs. using external advisors?
- Exploring why certain operating teams have such success
- How to measure success of a team's operating performance

Selim Loukil, Head of Portfolio Support Group, Europe, **Advent International**

09:20

Commercial excellence survey

10:00

The status of the operating partner within PE

- Has the status of the operating partner changed at panellists' firms since March 2020?
- To what extent are leading operating partners involved in deal making?
- Planning for the next disruption within a portfolio

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- Should operating partners be given skin in the game?

Simon Adcock, Partner, Head of Portfolio Management, **Bowmark Capital**

Christopher Harwood, Managing Director, Portfolio Operations, London, **Centrebridge Partners**

James Markham, Senior Partner – Value Creation, **Graphite Capital**

10:35

Keynote interview: how value creation has evolved in North America since March 2020

11:00

Coffee & networking

11:30

Boardroom case study: reacting to a crisis

This unique and interactive session will consider how a board should deal with a PR crisis. The audience will be given the chance to comment on key decisions made by the board, in addition to being given a series of options for the decisions they would make

12:00

Implementing a value creation plan in an inflationary environment

- To what extent is inflation impacting approach at portfolio companies?
- Sustaining margins through inflationary pressures
- How managing procurement and supply chain management can enhance resilience
- Practical tips considering how to address inflation in different sectors

12:30

Case study: how to manage pricing during inflationary times

- Why data and modelling are essential for making informed decisions
- The importance of monitoring competitors pricing changes
- Understanding your offering and which parts of the business

13:00

Networking lunch

Stream A Functional Breakouts	Stream B Functional Breakouts	Stream C Breakout Workouts
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<p>14:00 Building your sales toolkit</p> <ul style="list-style-type: none"> - Practical tools for driving sales growth - Examples of teams & industries that have found hybrid working difficult - What will the future sales team look like? 	<p>14:00 Managing for tech risk during due diligence</p> <ul style="list-style-type: none"> - Tips for third party advisors to use during DD - What are the main risks? - Building an understanding of the costs of fixing any tech issues with a potential investment 	<p>14:00 Recruiting CEOs for PE backed companies</p> <ul style="list-style-type: none"> - Situational vs. sector experience: do you need both? - What makes an exceptional CEO? - How can operating partners help CEOs reach peak performance? <p>Alejandro Rodríguez-Carmona, Experienced CEO, PE owned companies TBC: Anne-Marie Laing, Transformation Consultant, Agilitas Private Equity</p>
<p>14:35 Supply chain and value creation</p> <ul style="list-style-type: none"> - The importance of diversified supply chains - Mitigating risk and driving returns - Examples of innovative supply chain management through the pandemic 	<p>14:35 Cost take-out through Robotic Process Automation (RPA)</p> <ul style="list-style-type: none"> - Working out where there are potential savings - Integrating RPA within wider value creation strategy - RPA monitoring and governance - Case studies of successful RPA's 	<p>14:35 Implementing HR excellence within your portfolio</p> <ul style="list-style-type: none"> - Distinguishing between HR & talent: why is HR often overlooked by PE? - How to engage with portfolio companies on HR - What new roles are firms considering?
<p>15:10 Developing an effective Go-To-Market strategy</p> <ul style="list-style-type: none"> - What factors to consider when developing a strategy 	<p>15:10 Unlocking the cloud revolution for portfolio value creation</p> <ul style="list-style-type: none"> - Create value through cost optimization and product modernization using Cloud 	<p>15:10 How is the c-suite evolving in an increasingly digital world?</p> <ul style="list-style-type: none"> - Does a typical CTO have the relevant expertise to

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<ul style="list-style-type: none"> - Understanding the size and potential for your product <p>How to reach and sell to potential customers</p> <p>Tobias Klaiber, Operating Partner, Aurelius Group Shafali Gupta, Principal, Milestone Performance Partners, Bregal Milestone</p>	<ul style="list-style-type: none"> - Leverage the cloud for scalability and reliability <p>Increase revenue through strategic cloud partnerships</p>	<p>manage a digital value creation plan?</p> <ul style="list-style-type: none"> - Why more firms are hiring Chief Product Officers - Where and how to find talent in a competitive environment <p>Matt Baird, Managing Director, Operations & Strategy, OMERS Private Equity Europe Gilad Amir, Digital Operating Partner, Pollen Street Capital</p>
<p>15:45 Procurement: from cost-cutting to value creation</p> <ul style="list-style-type: none"> - Why it is essential to move beyond to quick wins - To what extent should procurement be included in diligence? - What does procurement transformation look like in practice? 	<p>15:45 How to use data in value creation</p> <ul style="list-style-type: none"> - How are GPs gathering data? - What tech solutions are available for GPs looking at operational management of assets? - Advice for generalists looking to these areas on engaging with consultants <p>Sachin Korantak, Operating Partner and PE Investor, Investec Asset Management Albert Vazquez, Operating Partner, Sway Ventures Lisa Weaver-Lambert, Data and Digital Operating Partner, Independent</p>	<p>15:45 The importance of the boardroom on driving company culture</p> <ul style="list-style-type: none"> - How to enhance board oversight - To what extent are boards leading on culture? - How to identify a toxic culture and how can the board implement change <p>Rudi Pattni, Partner, Investments, Zetland Capital</p>

16:20

Coffee & networking

Visit the [agenda page](#) for the latest updates.

For programme information contact Charles Gould Charles.g@peimedia.com

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16:45

Best practices in advisor management

- Finding the right advisor and ensuring the most suitable advisors are chosen
- How to get the most out of advisors once working with them
- Which relationship and governance structure to be implemented

Maria Carradice, Managing Director, **Mayfair Equity Partners**

Oliver Meakin, Senior Portfolio Advisor, **Equistone Partners Europe**

17:15

Roundtable discussions over drinks

18:00

Close of conference followed by cocktail reception

Day two: 12 May

08:00

Invitation-only Think Tank for Operating Partners

This closed-door session is an opportunity to share first-hand accounts on how to best position yourself in your career as an operating partner. The think tank will expose the toughest challenges operating partners face daily and will allow you to learn best practices in dealing with them.

09:30

Boardroom case study: reacting to a crisis

This unique and interactive session will consider how a board should deal with a crisis. The audience will be given the chance to comment on key decisions made by the board, in addition to being given a series of options for the decisions they would make

10:00

Carveouts from a tech perspective

- The art of IT separation in carve-out operations
- Estimating the cost and time required to separate systems
- Why the value creation programme and the carve-out roadmap must be connected
- Examples of PE doing carveouts well

Visit the [agenda page](#) for the latest updates.

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10:30

Practical steps to embedding ESG within value creation

- Should the head of ESG sit within the value creation team?
- How to show value created: to what extent are external rating agencies a useful tool?
- Opportunities created from sustainability linked loans
- Going beyond the E
- How to address the EU taxonomy and other regulations

Guy Semmens, Managing Partner, **Gyrus Capital**

Violette Castagné, VCP Director, **LDC**

11:00

Coffee & networking

11:30

The future of work and what it means for PE backed businesses

- How to manage hybrid teams and dealing with those who don't want to return to the office
- Onboarding staff whilst teams are working remotely
- Ensuring that DEI doesn't get forgotten in times of business disruption
- Avoiding the echo chamber of management meetings run on zoom

Riccardo Basile, Principal, **Permira**

12:00

Interacting with CFOs during budget season and throughout the year

- Practical tips for tools to use, what tech solutions can help with budgeting?
- Budgeting and forecasting best practice
- How to work alongside CFOs to get board signoff on budgets
- How to budget year-round when market conditions are changing

12:30

Operating partners compensation & career satisfaction

Presentation of the results of an anonymous survey on how operating partners are remunerated, whether they have carry, general career satisfaction etc

12:50

Progressing your career as an operating partner

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- Reflections on survey results
- What do the most effective operating partners have in common?
- To what extent is there a glass ceiling within PE for operating partners?
- Preview of upcoming standards (e.g., CFA, SDG Impact) and regulations (e.g., SFDR, FCA) that may require verification

13:20

Close of conference followed by lunch

13:45

Invitation only working group sessions:

These will offer an opportunity for operating partners to discuss different topics of value creation in small groups allowing you to build your network of operating partners with similar areas of expertise.

- **Working Group A: Practical tips for putting ESG at the centre of a value creation plan**
- **Working Group B: Developing a world class go-to-market strategy**