

# Operating Partners Forum San Francisco 2022

June 2  
JW Marriott Union Square

## Operating Partners Forum San Francisco 2022 Agenda

**Day 1:** Thursday, June 2

**7:30-9:00** Registration and breakfast

### **7:45** Think tanks for full-time operating partners — value creation war room (invitation-only)

Invitation-only think tank for full-time PE and VC operating partners. This closed-door discussion will allow you to learn and share best value creation practices of successful operating partners. The think tank will allow you to submit topics in advance to be covered in the room. Please select one of the three rooms based on portfolio company size:

#### Think Tank Room 1

**Private Equity**

#### **Facilitators:**

**Jason Friedrichs**, Director, Portfolio Operations, **Altamont Capital Partners**

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

#### Think Tank Room 2

**Venture Capital**

#### **Facilitators:**

**Rami Branitzky**, Partner, **Sapphire Ventures**

**Albert Vazquez-Agusti**, Operating Partner, **Sway Ventures**

**8:40** PEI's welcome and chairman's opening remarks

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



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# Operating Partners Forum San Francisco 2022

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9:00

## The future of value creation and the end of the pandemic: what comes next?

- How to perform in an environment of increased interest rates and inflation
- How is the value creation recipe changing? How 100-day plans are changing/accelerating in the current environment and years to come?
- To what extent is price inflation and wage inflation impacting approaches at your portfolio companies?
- Where is PE investing its time and resources across value creation to fight off inflationary pressures?
- How is private equity “future-proofing” and building resilience in its portfolios?
- Essential steps and countermeasures for your portfolio companies
- Uncovering longer term operational investments and approaches in looking at valuations as interest rates are rising

**Moderator: Jeffrey Klein, Managing Director, Alvarez & Marsal**

**Panelists:**

**Paul DeMand, Managing Director and Partner, ShawKwei & Partners**

**Bala Ganesan, Managing Director, Special Situations, Oaktree Capital Management**

**John Roselli, Operating Partner, New Harbor Capital**

**Menno Veeneklaas, General Operating Partner, Allegro Funds**

9:40

## Scaling management teams and organization capabilities for growth

- Translating the value creation plan into critical capabilities and roles
- How to assess CEOs for growth
- Scaling the management teams
- Establishing an organization blueprint that aligns with the value creation plan
- When and how to make changes at the top
- Warning signs on an organization’s ability to add capacity

**Moderator:**

**Dan Hawkins, CEO, Summit Leadership Partners**

**Panelists:**

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

**Ignacio Giraldo, Partner, TPG Growth**

**Karina Sobieski, Human Capital Director, Portfolio Support Group, Advent International**



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10:20

## The archetype of a world class operating team: PE and VC share best practices

- Uncovering where successful operating partner teams focus their attention: value creation team processes, resources, and playbooks; how to deploy an operating team
- What does your engagement approach look like? How will the engagement approach change in a more remote world? How do you build trust?
- Comparing operating partner models and the evolution of operating teams: how is the operating partner model changing at your firm?
- Team designs: generalists to functional specialists; have you added new specialists?
- How is value creation different in PE vs. VC and what can each learn from each other? What lessons can PE and VC share to enable some degree of crosspollination
- Bridging the gap between the investment team model and what happens in reality
- Making the “magic quadrant” work: how the deal partner, operating partner, CEO, and board can work together to deliver value creation

**Moderator: Greg Petraetis**, Managing Director, Midmarket and Partner Ecosystem, North America, **SAP**

**Panelists:**

**Rami Branitzky**, Partner, **Sapphire Ventures**

**Martina Lauchengco**, Partner, **Costanoa Ventures**

**Marco Mendes**, Managing Director, Portfolio Support Group, **Advent International**

**Paul Zuber**, Operating Partner, **Thoma Bravo**



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# Operating Partners Forum San Francisco 2022

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11:00

## Unlocking the transformative due diligence imperative

- Where are PE Firms investing time and resources across functional areas in due diligence?
- Uncovering four key focus areas for diligence: costs, human capital, technology, and go-to-market strategies
- Refining your due diligence playbook in identifying risks and value creation opportunities
- How do you think about doing due diligence across the portfolio to look for ways to enable, accelerate, or open a new strategic opportunity?
- Looking at why and how operating partners should play a greater role in due diligence
- Partnering with deal teams for success: how to manage tension between the deal side and value side and what is the right way to integrate both sides
- Understanding how due diligence impacts the holistic cycle and your value creation journey

**Moderator:**

**Houston Slatton**, Senior Director, **BluWave**

**Panelists:**

**Deborah Gallegos**, Managing Director, **Palladium Equity Partners**

**Drew Scielzo**, Operating Partner, **ACON Investments**

**Sheheryar Shah**, Chief Operating Officer and Chief Investment Officer, **ZT Corporate**

11:35

## Networking break



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# Operating Partners Forum San Francisco 2022

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## Interactive Working Groups - Series 1

12:00

Group 1 (for operating partners only)

**The war for talent and the Great Resignation:  
operating partners share war stories**

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

- Uncovering creative ways to respond to the Great Resignation outside of paying portco teams significantly more
- What are good practices in finding talent at the various levels not just the executive level in this environment? How are you recruiting talent remotely?
- Sharing stories in dealing with wage increases and compensation, building out teams, and working with remote workforces
- Understanding the importance of culture in attracting and retaining talent

**Facilitators:**

**Dan Grosh**, Operating Partner, **Diversis Capital**

**Todd Hall**, Director, **AspireHR**

Group 2 (for operating partners only)

**100-day plans: operating partners share dos and don'ts**

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

- Fast start: coming out strong from day one in onboarding new portfolio companies even in the face of recent uncertainty
- What's key for your first 100 days to convert to execution?
- How 100-day plans are changing in the current environment and years to come
- How to prioritize: identifying the most important value creation areas to focus on
- Best practices for the first 90–180 days vs. 365+
- Day 1-100: structured approaches, pragmatic actions, and tools to bring about rapid alignment and focus

**Facilitator:**

**Lou Brothers**, Principal, National Leader for Operations Due Diligence, **RSM US**



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12:40      **Networking lunch**

12:40      **Women in PE and VC portfolio operations lunch (invitation-only)**

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

- Exploring career paths, development, and how to position ourselves as female leaders
- Is your firm focused on women's leadership at portfolio companies?
- What initiatives are you driving for women on boards across portcos? What can be done?
- Does your firm have any specific programs, leadership coaching, or assessments geared towards promoting women's leadership?
- Looking at trends and stats in gender in PE and VC

**Facilitator:**

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

**Jean Hill**, Managing Director, **Alvarez & Marsal**

**Sponsored by:**

**Alvarez & Marsal**



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# Operating Partners Forum San Francisco 2022

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## Breakout - Series 1

1:40

Track 1

### Putting ESG at the heart of your business strategy in the new sustainable economy

- Practical steps to embedding ESG within value creation
- Mapping out and engaging with all key stakeholders on ESG
- How do your portfolio companies think about ESG in looking at climate change, and their carbon footprint? Any other specific areas within ESG?
- What are the implications of not adequately addressing ESG?
- ESG due diligence best practices
- ESG reporting: what is the level of rigor needed? How are ESG based KPIs, and metrics being used?
- What is the role of the operating partner in driving ESG initiatives?

**Moderator:**

**Scott Corwin**, Managing Director, US Leader for Sustainability and Climate Change, **Deloitte**

**Panelists:**

**Andrew Collins**, Director of ESG Investing, **San Francisco Employees' Retirement System (SFERS)**  
**Sam Johnson**, Vice President, Portfolio Operations and Head of ESG, **Arcline Investment Management**  
**Ashley McNamee**, Director of ESG - Portfolio Transformation Group, **Revelstoke Capital Partners**  
**Avi Sahi**, Chief Commercialization Officer, **OGCI Climate Investments**  
**Susan Stella**, Head of Investor Relations and ESG, **Activate Capital**

Track 2

### Rapid acceleration value creation plans for the mid-market

- Uncovering post COVID rapid acceleration value creation plans in starting your journey with mid-market portfolio companies
- How do you have an immediate impact in mid-market companies and what does your engagement model look like?
- How do you get management teams aligned when shifting management teams?
- Uncovering approaches in engaging with founder led mid-market companies: dos and don'ts; how to have them let go of the reigns and trust the management teams to build and scale
- Looking at four phases: the legacy team, the middle management team to get where needed, the more specialized team, and the exit phase
- How do you drive rapid market entry for more traditional companies?

**Moderator:**

**Adam Williams**, Vice President, Private Equity, **Symphony**

**Panelists:**

**Marc Herdegen**, Senior Operating Partner, Strategy, **New State Capital Partners**  
**Thad Longson**, Operating Principal, **HGGC**  
**Manvendra Saxena**, Operating Partner  
**Juliane Stephan**, Director, Catalyst Group, **Incline Equity Partners**



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# Operating Partners Forum San Francisco 2022

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## Breakout - Series 2

2:20

Track 3

### State of the PE sponsor-CFO relationship: alignment, expectations, and impact

- Examining the PE sponsor-CFO relationship across three critical dimensions: measuring the business (collecting the data to inform insights), managing the business (reporting, technology infrastructure, KPIs), scaling the business (operational levers to drive accelerated growth)
- Looking at misalignment as vital intel in service of CFO-sponsor expectations, communication, collaboration, and investment success
- Understanding how the CFO role has changed and how the office of the CFO is becoming more strategic for value creation
- How to make your finance better through people, processes, and technology

**Moderator:**

**Rishi Jain**, Managing Director and Co-Head of Western Region, **Accordion**

**Panelists:**

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

**Brian Regan**, Managing Director and Chief Financial Officer, **Spectrum Equity**

**Carlos Rodriguez**, Senior Vice President, Operations, **CriticalPoint Capital**

**David Savage**, Head of Portfolio Operations, **Arcline Investment Management**

Track 4

### Igniting growth levers: optimizing recurring revenue across the full bowtie

To achieve sustainable growth, the most successful companies are employing a full funnel strategy, using a 'bowtie' rather than 'funnel' and applying a common operating system across Sales, Marketing, and Customer Success. Join this session to hear from operating partners who are successfully applying this framework across their portfolios.

- Changing mindset from traditional funnel to full bowtie
- The principles behind the bowtie, and why this makes sense for recurring revenue models
- Identifying and unlocking growth levers
- What it really means to have a shared methodology and common language across Marketing, Sales, and Customer Success
- How to think about training in the talent shortage in this context
- The biggest areas that are drivers of growth across SaaS portfolios in 2022

**Moderator:**

**Lauren Goldstein**, Practice Lead, Private Equity Business, **Winning by Design**

**Panelists:**

**Scott Graham**, Operating Partner, Marketing and Growth, **Diversis Capital**

**Kevin Jeon**, Director of Revenue Optimization, Peak Performance Group, **Summit Partners**

**Ray Villareal**, Partner, **Strattam Capital**



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## Breakout - Series 3

<b>3:00</b>	Track 5 <b>Marketing as a growth lever in the first 100 days</b>	Track 6 <b>Driving maximum value creation through specialized, composable digital procurement</b>
	<ul style="list-style-type: none"><li>• Understanding marketing as a value creation lever and why some companies don't grow as fast in the first 100 days</li><li>• Understanding what needs to be done in the diligence phase</li><li>• How do you think about demand generation, lead generation opportunities, integration of departments, and how to scale?</li><li>• How does marketing support sales: what works and what doesn't? How to stay involved with sales enablement; how to ensure they have what is needed</li><li>• How do you think about brand in association with SaaS companies?</li><li>• How do you think about holistic growth: how to optimize your marketing process?</li><li>• Uncovering pricing strategies for marketing</li></ul> <p><b>Moderator:</b> <b>Shiv Narayanan</b>, Founder and CEO, <b>How To SaaS</b></p> <p><b>Panelists:</b> <b>Brett Derby</b>, Vice President, Portfolio Operations, <b>GI Partners</b> <b>Mark Fiske</b>, Operating Partner, Digital and Marketing Strategies, <b>H.I.G. Capital</b> <b>Tye Howell</b>, Managing Director of Data and Digital, <b>Blue Point Capital Partners</b> <b>Prachi Kanabar</b>, Head of Portfolio Operations, <b>Sunstone Partners</b></p>	<p>When it comes to big procurement technology, everyone has a horror story to tell. Learn how specialized, low-code digital procurement technology is changing the game for procurement practitioners in ways that big procurement technology hasn't:</p> <ul style="list-style-type: none"><li>• Understanding the top 3 limitations of big procurement technology</li><li>• Optimizing your existing technology investments in the new era of digital procurement</li><li>• How specialized solutions are helping procurement leaders achieve digital procurement transformation faster</li><li>• Implementing best practice cost reduction strategies via optimized spend management and visibility</li><li>• How Tail spend management has become a potent source of value creation for private equity</li></ul> <p><b>Presenters:</b> <b>Stefan Dent</b>, Chief Alliances Officer, <b>Simfoni</b> <b>Paul Dhaliwal</b>, Director, <b>KKR Capstone</b></p>
<b>3:40</b>	<b>Networking coffee break</b>	



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# Operating Partners Forum San Francisco 2022

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## Interactive Working Groups - Series 2

4:00

Group 3 (for operating partners only)

### Improving pricing strategy during inflationary times

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

- Key steps to offset price inflation: leveraging inflationary times to expand margin
- Dealing with sustained price volatility: successful elements to protect margins, drive growth and offset the commercial implications of these effects
- Implementing robust and workable pricing processes and systems
- How to use data and other tools for better pricing and pricing adjustments in current times
- Understanding the importance of monitoring competitors' pricing changes
- Sharing pricing models in dealing with the current inflationary environment
- Uncovering how to engage with your companies when it comes to pricing to successfully execute projects

**Facilitators:**

**Jorge Rosales**, Vice President, Growth Team – Pricing Center of Excellence, **Serent Capital**  
**Sara Yamase**, Partner, **Simon-Kucher & Partners**

Group 4 (for operating partners only)

### Navigating supply chain disruptions and post-COVID best practices

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

- Uncovering severe supply chain disruptions that have had significant impacts on timely delivery and product costs
- How is inflation/price inflation affecting distribution costs and your supply chain strategy overall?
- What new/recent strategies have you adopted to enhance resiliency and meet customer demand?
- Are you looking at more solutions in region for your region?
- How have constraints affected your ability to grow and drive innovation in companies?
- What are some innovative examples of supply chain management that worked through the pandemic?
- Supply chain cost optimization in this environment: individual company vs. cross-portfolio programs

**Facilitator:**

**George Rhymestine**, Vice President, **Insight Sourcing Group**



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# Operating Partners Forum San Francisco 2022

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## Interactive Working Groups - Series 3

4:40

Group 5 (for operating partners only)

### The future of sales and GTM strategies: operating partners share their thoughts

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

- Evaluating your sales organization's readiness: due diligence and assessment best practices
- Mapping and coaching a sales organization in looking at sales leaders, teams, traits, competencies, compensation, and culture
- Understanding best practices in setting a foundation from sales methodologies to go to market strategies
- Common alignment across portcos: GTM strategies and sales efficiency to optimize your revenue generating function
- How to solve go to market in finding the right partners and resources
- Which KPIs matter the most: leading metrics
- Sharing differences in how to go to market for tech companies vs. non tech companies from both a diligence and optimization perspective
- The future of sales and GTM in looking at tech levers, lead generation, data

**Facilitators:**

**Ted Kamione**, Operating Partner, **STG Partners**  
**Dave Leong**, Account Executive, **Illumiti**

Group 6 (for operating partners only)

### Financial transformations: operating partners share their thoughts

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

- Uncovering CFO key skills for portfolio company growth and management
- How can operating teams position the CFO for success? What works and what doesn't?
- Establishing roadmaps for CFOs: digitizing your finance practice and reporting best practices
- How have you worked with CFOs to define their path to value via data and automation? What areas of automation in finance and accounting have been the most successful?
- Looking to automation and general efficiency improvements as an answer to the 'talent crunch' of finance and accounting professionals
- How does the CFO navigate the increasing IT complexity of today's world, especially without an IT background?
- Uncovering stories of how finance teams and modern CFOs are embracing automation as a value-add service

**Facilitator:**

**Sarah Dickens Spoja**, Chief Financial Officer, **Tipalti**

5:20

### End of day 1 and networking cocktail reception



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# Operating Partners Technology Forum San Francisco 2022

June 3  
JW Marriott Union Square

## Operating Partners Technology Forum San Francisco 2022 Agenda

Day 2: Friday, June 3

7:30-9:00 Registration and breakfast

### 7:30 Think tanks for full-time operating partners — value creation war room (invitation-only)

Think tank for full-time PE and VC operating partners. This closed-door discussion will allow you to learn and share value creation best practices of successful operating partners. The think tank will allow you to submit topics. Please select one of the two rooms:

#### Think Tank Room 1

**The future of digital operating partner models: comparing models**

**Facilitator:**

**Carsten Weber**, Technology Director, **The Sterling Group**

#### Think Tank Room 2

**Uncovering tech solutions, consultants, and third parties for value creation**

**Facilitator:**

**Richard Spencer**, Co-Founder, Chief Operating Officer, Operating Partner, **Kamylon Holdings**

8:25 Chairman's welcome

### 8:30 Unlocking the cloud revolution for portfolio value creation

- Uncovering cloud transformation success stories: cloud migration case studies
- Key cloud transformation external and internal business aspects: how to handle it with your portcos
- Leverage the cloud for scalability and reliability
- Create value through cost optimization and product modernization using Cloud
- Cloud migrations and application transformations: looking at continuous investment into cloud infrastructure throughout the lifecycle
- Multi-cloud vs. single cloud vs. hybrid cloud
- Key cloud considerations when it comes to data analytics and privacy
- Understanding the financial aspects of strategic cloud partnerships on revenue and costs

**Moderator:**

**David Hicks**, Vice President, Worldwide ISV Ecosystem Business Development, **Oracle**

**Panelists:**

**Prashanth (PV) Bóccasam**, Partner, **Cota Capital**

**Steve Cochran**, Operating Advisor, **Thoma Bravo**

**Neil Roseman**, Technologist-in-Residence, **Summit Partners**



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# Operating Partners Technology Forum San Francisco 2022

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JW Marriott Union Square

9:00

## Private equity-leadership team alignment in an increasingly digital world

- How is the C-suite evolving? How will CEOs adapt and what does the next generation CEO look like in a more digital world?
- Achieving alignment with leadership, strategy, IT teams, and tech capabilities
- Getting management teams up to speed with tech: how to educate and make them more comfortable with technologies and data to be adopted by their teams
- Technology playbooks and value creation roadmap execution throughout the entire lifecycle
- Understanding the future journey of digital value creation and what management teams need to do in the current environment and years to come
- How are digital operating partners engaging with deal teams and management teams on the value creation thesis and objectives
- Looking at why more firms are hiring Chief Product Officers, Chief Digital Officers, and Chief Data Officers
- Technology playbooks and value creation roadmap execution throughout the entire lifecycle
- Understanding the future journey of digital value creation and what management teams need to do in the current environment and years to come
- How are digital operating partners engaging with deal teams and management teams on the value creation thesis and objectives
- Looking at why more firms are hiring Chief Product Officers, Chief Digital Officers, and Chief Data Officers

**Moderator:**

**Tim Ziemann**, Senior Manager, Transformation, **Grant Thornton**

**Panelists:**

**Ben Johnson**, Managing Director, Product Management, **LLR Partners**

**Jim Lott**, Managing Director, Peak Growth Consulting, **Peak Rock Capital**

**Lee McCabe**, Operating Partner, **AEA Investors**



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## 9:40 Digital innovation initiatives in the fast lane: accelerating value creation through tech

- Value creation through technology modernization - what are the most impactful projects and top tech trends?
- Which emerging technologies for value creation have you most excited?
- First-hand examples of how the current environment has accelerated rapid innovation and digitalization (resulting in increased investment in tech) and what comes next?
- Digital innovation for scalability and to sustain growth: looking at tools and process innovation to keep up with product innovation
- Digital innovation as a means to build resilience: technologies to help your portfolio in current times, understanding the impact of digital technologies on your workforce

**Moderator:**

**Declan Morris**, Private Equity Transformation Advisor, **Amazon Web Services (AWS)**

**Panelists:**

**Eli Potter**, CIO as a Service, **Insight Partners**

**Neil Roseman**, Technologist-in-Residence, **Summit Partners**

**Jeffrey Stone**, Managing Director, Head of Growth Portfolio Operations, **Sixth Street**

## 10:20 Digital transformation portfolio company case studies across different industries

- Tech enablement and tech road mapping for more traditional businesses vs. tech businesses
- Looking at capabilities in supporting portfolio company transformations versus mere optimization
- Operating partners share specific portfolio case studies and war stories in driving and executing digital transformation projects in different industries
- Uncovering use cases in accelerating rapid digital transformation and understanding what works best for your industry

**Moderator:**

**Sarah Walker**, AVP, Global Head of Private Equity Practice, **Salesforce**

**Panelists:**

**Anna Carlsmith**, Director, Digital Strategies, **H.I.G. Growth Partners**

**Igor Cherny**, Chief Technology Officer, Operating Partner, **TSG Consumer Partners**

**Anders Thulin**, Head of Digital Practice, **Triton Partners**

## 11:00 Networking break



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## Interactive Working Groups - Series 4

11:20

Group 7 (for operating partners only)

### Digital value creation dos and don'ts: operating partners share best practices

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

- Use of digital to increase effectiveness and efficiency of portfolio company operations
- Using latest cloud and digital technologies and processes to massively increase your speed of innovation and market success
- Using modern predictive AI and ML approaches to transform operations

**Facilitators:**

**Daniel Boland**, Managing Director,  
AlixPartners

**Sanjay Verma**, Managing Director,  
AlixPartners

Group 8 (for operating partners only)

### Winning the war for tech talent: operating partners share their thoughts

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

- Overcoming the challenges associated with tech talent: attracting, retaining, and supporting tech talent in the current environment
- Where and how to find tech talent in a highly competitive environment? What strategies are leading PE portfolio companies utilizing to find great tech talent?
- Understanding what type of tech talent is needed in incorporating key levers such as AI and robotics
- What are challenges and benefits of hiring and onboarding tech talent remotely
- Leveraging tools and resources within the tech war for talent

**Facilitator:**

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



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# Operating Partners Technology Forum San Francisco 2022

June 3  
JW Marriott Union Square

## Breakout - Series 4

12:00

Track 7

**Tech due diligence and post close integration done right: aligning the digital imperative with your investment thesis**

- Operating partner war stories in looking at successful tech due diligence and post close technology readiness in partnering with investment teams, providers, and target companies
- What is most critical to accurately understand about a company's technology capabilities and infrastructure pre-deal?
- How to start with digital and tech value creation within your portfolio company: which digital and growth transformation strategies do you prioritize
- How to leverage IT diligence to position the business to scale and avoid post-deal technical integration challenges
- Data for due diligence: assessing the investment through data in looking at potential return

**Moderator:**

**Lou Brothers**, Principal, National Leader for Operations Due Diligence, **RSM US**

**Panelists:**

**Ori Ben-Moshe**, Director of Portfolio Operations, **ORIX Capital Partners**  
**Martin Mumford**, Operating Partner, **Angeles Equity Partners**  
**Carsten Weber**, Technology Director, **The Sterling Group**

Track 8

**Working with CIOs/CTOs: dos and don'ts**

- Understanding how the office of the CIO/CTO is becoming more strategic and what to look for in a CIO/CTO?
- How is the CIO and CTO role evolving? How are backgrounds/required skills changing?
- Does a typical CTO have the relevant expertise to manage a digital value creation plan?
- Sharing operating partner-CIO/CTO dynamics: what works and what doesn't
- What are the challenges? How are operating partners influencing CTO decision making?
- Looking at best practices in working with different types of companies
- How is the engagement approach changing in a more remote setup?

**Moderator:**

**Rick Brown**, President, **Emergys**

**Panelists:**

**Igor Cherny**, Chief Technology Officer, Operating Partner, **TSG Consumer Partners**  
**Bobbi Kommineni**, Operating Partner, **Terminus Capital Partners**  
**Juliane Stephan**, Principal, Catalyst Group, **Incline Equity Partners**



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## 12:40 Networking Lunch

### Breakout - Series 5

1:40

Track 9

#### Digitizing the customer journey: keys to success

- Best practices in digitizing the end-to-end customer experience, process mapping the customer journey: understanding your client journey and driving efficiencies
- Tracking and grasping the level of engagement: how to transform how you interact with customers
- Sharing examples of how portfolio companies have accelerated digital at rapid speed to better center around the customer
- Looking at pricing and retention as a key piece of the puzzle
- Understanding how to digitize non digital businesses
- Leveraging data analytics and data for automation
- Applying AIML to the customer experience

**Moderator:**

**Venkat Sreenivasan**, Director, AlixPartners

**Panelists:**

**Ben Cox**, Operating Director, **Sumeru Equity Partners**

**Elizabeth Dresdale**, Principal, The Catalyst Group,  
**Incline Equity Partners**

**Margo Hays**, Managing Director, Digital Strategy, TSG  
Consumer Partners

**Andy Pickens**, Managing Director, Digital, Data, and  
Analytics, Apollo Portfolio Performance Solutions,  
**Apollo Global Management**

Track 10

#### Accelerated and differentiated portco operational results through advanced analytics and machine learning

The panel explores examples where algorithms and machine learning have been used to discover, validate, and quantify operational risk and capture value opportunities. It will provide insight into leading practices and learnings within the industry. We deep dive into:

- External analytics enabling operational risk analysis
- The deployment of algorithms and machine learning as part of a functional transformation

**Moderator:**

**Sebastian de Meel**, Principal, **PwC**

**Panelists:**

**Mark Chamness**, Head of Data Science, **Invictus Growth Partners**

**Manek Kapur**, Senior Vice President, Technology Private Equity, **Partners Group**

**Karl Meyer**, Managing Director and Head of Portfolio Operations, **Digital Alpha**

**Richard Spencer**, Co-Founder, Chief Operating Officer, Operating Partner, **Kamylon Holdings**



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# Operating Partners Technology Forum San Francisco 2022

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## Breakout - Series 6

2:20

Track 11

### Cybersecurity: raising your standards in the current cyber epidemic

- First-hand stories in dealing with cybersecurity breaches: what to do and what not to do
- Measures to ensure that no costly active cyber incidents impact the cost of the deal
- How do you define good cybersecurity? What is enough security? How prescriptive are you on cybersecurity? How do you engage with portfolio companies about cyber?
- How to allocate resources to it: how is security diligence changing?
- Cyber training and assessment best practices
- Cost effective portfolio security and risk management
- Addressing cyber liability insurance carrier requirements

**Moderator:**

**Chris Hueneke**, Chief Information Security Officer, **RKON**

**Panelists:**

**Brad Strahorn**, Director, Portfolio Support Group, **Thompson Street Capital Partners**

**Anders Thulin**, Head of Digital Practice, **Triton Partners**

**Andrew Vittetoe**, Private Equity – Technology, **Partners Group**

Track 12

### Maximizing deal value and return through modern data architectures

- *Acquisition*: how long after closing does it take to begin receiving meaningful financial information? How long after close does it take to begin regularly tracking and acting upon KPIs and OKRs?
- *Hold*: How do you handle integrations for buy and build strategies? What are the common strategies employed today through modernization? What advantages does moving to a more modern data architecture and automation bring?
- *Exit*: How are exit timelines affected by the quality of financial reporting? How far in advance of a potential exit do your portcos begin the process of collecting, analyzing and preparing financial information and disclosures?

**Moderator:**

**Josh Beaver**, Chief Operating Officer, **OverlayAnalytics**

**Panelists:**

**Tye Howell**, Managing Director of Data and Digital, **Blue Point Capital Partners**

**Gus Spanos**, Managing Director, **SBJ Capital**

**Menno Veeneklaas**, General Operating Partner, **Allegro Funds**



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# Operating Partners Technology Forum San Francisco 2022

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## 3:00 The future of finance: 360° cash flow visibility and control — optimization via digitization

- What finance organizations can do to optimize cash flows via digitization and automation
- Why payment users expect consumer-level speed and convenience – and how to meet those expectations
- Why engaging with the right external tech partner is key to achieving holistic cash forecasting

**Moderator:**

**Matt Clark**, President and Chief Operating Officer, **Corcentric**

**Panelists:**

**Larry Cook**, Head of Global Finance and Operations, **Flourish Ventures**

**Frederick Shaw**, Chief Risk Officer, **Hamilton Lane**

## 3:40 Value creation levers for enterprise software companies — war stories in working with tech portfolio companies

Historically, PE firms have employed “Buy & Build” strategies with a philosophy of buying, restructuring, and holding assets — all with a plan to sell at the right time. Yet increasingly, enterprise software companies are creating value beyond quick fix initiatives to leverage multiple value creation levers and capitalize on digital transformation. These PEs are now expanding their focus to accelerate product modernization, invest in product line expansion, and explore innovation through ecosystem relationships for their portfolio companies.

**Moderator:**

**Punit Kulkarni**, Vice President, Private Equity, **Persistent Systems**

**Panelists:**

**Blake Adams**, Senior Vice President, Tech Opportunities, **Bain Capital**

**Prital Kadakia**, Partner, **Serent Capital**

**Ravi Ravikumar**, Operating Partner, **Cota Capital**

**Neal Sainani**, Practice Director, **K1 Investment Management**



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# Operating Partners Technology Forum San Francisco 2022

June 3  
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4:20

## Uncovering tech playbooks and strategies in carveouts and M&As

- Tech M&A integration best practices: key steps for PE and their portfolio companies
- How have you managed to overcome tech stack integration challenges to jump-start the transformation process
- Tech enablement and IT functions to drive value in carveouts
- What must be done swiftly in the first 30 to 60 days
- Getting your management team aligned on key initiatives

**Moderator:**

**Aswatha “Amar” Amarnath**, Senior Vice President and Head of Global Sales Operations, **Wipro**

**Panelists:**

**Greg Caltabiano**, Operating Partner, **HGGC**

**Drew Farris**, Operating Partner, **Trive Capital**

**Bobbi Kommineni**, Operating Partner, **Terminus Capital Partners**

**Lee McCabe**, Operating Partner, **AEA Investors**

4:50

## Closing remarks and end of conference



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