

Operating Partners Forum Europe

Harness value creation in a changing market



Join Europe's leading community of operating partners



Discover how to successfully scale your operating team



Develop cross-functional strategies for an unpredictable market



Hear which levers experts recommend to accelerate value creation

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Operating Partners Forum Europe

Agenda

Pre-conference events - Tuesday, May 20, 2025

17:30 - 21.00 Operating Partners Forum Europe Pre-Event Welcome Reception & Dinner (invitation-only for operating partners)

Join the operating partners attending the Europe Forum at our opening grand reception and sit-down dinner. Exchange valuable insights with your peers in a relaxed setting and build your connections before the conference kicks off.

Day 1 - Wednesday May 21, 2025

7:30 Registration and breakfast

THINK TANK SERIES 1

8:00 Think tanks for full-time operating partners: value creation war rooms (invitation-only)

These closed-door discussions will allow you to learn and share strategies together with your operating partner peers. Please select one of the rooms based on your functional expertise:

Room 1: Digital and Technology Operating Partners

Room 2: Human Capital/Talent Operating Partners

Room 3: GTM, Sales and Revenue Growth Operating Partners

Room 4: Finance Operating Partners

8:55 PEI's welcome and chairman's opening remarks

9:10 The year to be "cautiously optimistic" - predictions for PE value creation in 2025

- Navigating market volatility with a focus on ensuring long-term value creation despite short-term challenges

- How to leverage advancements in technology and innovation, with private equity increasingly investing in digital transformation to drive operational efficiency and unlock new growth avenues
 - How is the role of the operating partner evolving given these market factors?
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9:50 Operating Partner/Deal Partner alignment: synergies for success

- How can operating partners help investment teams maximize returns
 - How can you ensure alignment and resolve internal frictions?
 - Operating partner best practices in working together as a team
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10:30 Networking break

11:00 New strategies for value creation for the first 100 days and throughout the first year

- Identifying successful strategies to enhance value within the initial 100 days
 - How have 100-day plans changed in recent years? What does the future playbook look like?
 - Real life examples of challenges and roadblocks during the first 100-days and how they've been resolved
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11:40 Portfolio company CEO perspectives - a deep dive into the "Do's and Don'ts"

- How to work effectively with the CEO and C-suite to ensure and deliver growth
 - The role of the CEO in succession planning and how this is anchored into the value creation strategy
 - Best practises from CEO's and the value creation lifecycle
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INTERACTIVE WORKING GROUP SERIES A

12:20 Interactive Working Group 1 (for operating partners only) | An Operating Partner's Playbook to driving value through procurement

- How companies are achieving significant procurement success
- Comparing cost management strategies to act as a hedge against the impact of inflation and other obstacles
- Exploring the critical role of collaboration between commercial and procurement teams to protect margins during economic volatility

This session will allow the audience to join an interactive discussion with designated facilitators.

12:20 Interactive Working Group 2 (for operating partners only) | How to collaborate with the deal team: operating partner workshop

- How to unlock value in the deal team effectively
- A playbook on how to collaborate with the deal team
- Successful and unsuccessful operating partner strategies

This session will allow the audience to join an interactive discussion with designated facilitators.



12:20 Interactive Working Group 3 (for operating partners only) | AI-Led Value Creation in Operations

- Real examples of how AI can streamline processes, reduce costs, and improve productivity across all portco operations
- How operating partners have used agentic AI to optimise value creation
- Case study examples of leveraging tech and data to drive multiples

This session will allow the audience to join an interactive discussion with designated facilitators.

13:00 Networking Lunch

13:00 Functional lunch discussion (for operating partners only)

This deep dive lunch session designed solely for operating partners will allow the audience to join an interactive discussion with designated functional experts facilitating.

FUNCTIONAL BREAKOUT SERIES 1

14:00 Track 1 Due diligence - does AI have a seat at the table?

- How has the role of the OP evolved with the application of AI in due diligence
- Harnessing data analytics and AI
- Successful examples of using AI in the due diligence process

14:00 Track 2 Revenue Growth: The silver bullet in times of depressed consumer behaviour

- How to deliver revenue growth in changing markets
- Sharing a pricing and sales toolkit to help navigate volatility
- How to work with your commercial teams to enhance revenue growth

14:00 Track 3 How to ensure an impactful and efficient supply chain

- How businesses are dealing with changing regulations globally
 - How to integrate ESG strategies into the supply chain and procurement process
 - Successful examples of managing costs and ensuring reliable supply chains
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FUNCTIONAL BREAKOUT SERIES 2

14:40 Track 4 How to increase level of resilience when incorporating cyber across a portfolio

- How to navigate a landscape where cyberattacks are escalating in both intensity and scale
- Playbook on how to effectively respond to an attack
- How to identify the best security tool and where to find it

- **14:40 Track 5 How to quantify and showcase success in the human capital function**

What is being done around pipelining talent and tracking the impact of human capital

- With the fatigue surrounding DE&I, how are PE houses holding themselves to account?
- Exploring the use of data in the human capital function

14:40 Track 6 Profitable revenue generation through sales, pricing and cost optimisation

- Simultaneous optimization of pricing, revenue, and costs to drive EBITDA increases
- Addressing challenges in high-inflation environments and improving commercial practices.
- Addressing revenue and margin leakage in complex organizations
- Aligning cross-functional business strategies for pricing and margin optimization

15:20 Networking break

FUNCTIONAL BREAKOUT SERIES 3

15:30 Track 7 Incorporating commercial due diligence into your operational playbooks

- How to leverage market analysis and competitor intelligence to inform operational strategies
- Strategies to align operational and financial goals
- How to ensure commercial due diligence findings shape both short-term and long-term operational plans

15:30 Track 8 Finance and accounting optimization for your portfolio companies: comparing innovative initiatives

- The role of finance in the value-creation engine
- The use of technology in finance optimization
- How to ensure stability in the finance and accounting functions in a challenging environment

15:30 Track 9 The role of tech and AI as a future level for the talent function

- How introducing technology can enhance efficiency, productivity and create value
- How can AI help to recruit and retrain talent?
- Case studies demonstrating the positive impact of AI on the recruitment process

FUNCTIONAL BREAKOUT SERIES 4

16:10 Track 10 Digital transformation case studies for SaaS companies

- Examining how SaaS companies have leveraged automation to streamline operations
- What were the long-term benefits of increased collaboration
- Lessons from SaaS businesses that have successfully migrated, focusing on the challenges faced and solutions implemented

16:10 Track 11 Go-to-Market strategy and execution: What defines excellence?

- Exploring the advantages and drawbacks of traditional go-to-market strategies and how to refine the approach for enhanced sales performance.
- Leveraging data-driven insights and analytics to shape targeted go-to-market strategies that boost revenue growth and create value.

- Diversifying your route to market and identifying the most effective channels to pursue

16:10 Track 12 Strategies to turn around underperforming portfolio companies

- Operating partner strategies to work with underperforming companies to get them back to a higher performance
- Identifying key and common challenges to move towards growth
- Case studies of successful transformations and the goals they used

16:50 Networking break

INTERACTIVE WORKING GROUP SERIES B

17:00 Interactive Working Group 4 (for operating partners only) | Operating partner perspectives on what effective tech and digital value creation playbooks look like

- Comparing tech spend vs tech value creation
- An operating partner step-by-step guide to technology and digital value creation
- Identifying the most common challenges and roadblocks

This session will allow the audience to join an interactive discussion with designated facilitators.

17:00 Interactive Working Group 5 (for operating partners only) | Recruiting the right CFO: Key considerations and best practices workshop

- What are the essential qualities that a portfolio company CFO must possess to succeed?
- Recruiting and retaining high quality CFOs for portfolio companies
- What are the key levers of having a joint finance and HR function? What is the impact on human capital?

This session will allow the audience to join an interactive discussion with designated facilitators.

17:00 Interactive Working Group 6 (for operating partners only) | Overcoming growth challenges for exit: Achieving a realistic valuation

- What does exit readiness mean? What is the importance of formalising an exit readiness process?
- How to take a B grade asset and prepare it for exit
- How should you use data analytics and reporting during exit preparation to maximize return

This session will allow the audience to join an interactive discussion with designated facilitators.

17:40 End of day and cocktail reception

Day 2 - Thursday May 22, 2025

7:40 Registration and breakfast

THINK TANK SERIES 2

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

This closed-door discussion will allow you to learn and share best practices of successful operating partners. The think tank will allow you to select one of the rooms:

Room 1: Emerging Operating Partners (1-2 years in PE)

Room 2: Advanced Operating Partners

Room 2: Heads of PE Portfolio Operations Teams: Leaders Think Tank

8:45 Breakfast Deep Dive Discussion 1 (for operating partners only) Working with CEOs to drive the value creation plan: operating partner insights

This breakfast deep dive session will allow all operating partners to join an interactive discussion with designated facilitators.

8:45 Breakfast Deep Dive Discussion 2 (for operating partners only) What makes a great CRO/commercial leader at your companies?

This breakfast deep dive session will allow all operating partners to join an interactive discussion with designated facilitators.

8:45 Breakfast Deep Dive Discussion 3 (for operating partners only) Operating partner-CHRO partnerships in delivering key HR initiatives

This breakfast deep dive session will allow all operating partners to join an interactive discussion with designated facilitators.

9:25 Chairman's welcome

9:30 Shaping the future of value creation through the AI lens: real world implementations

- An OP playbook on AI - what is there to know and understand
 - Identifying innovative ways of how operating partners and portfolio companies have implemented AI across the board
 - How to correctly allocate and resource for AI
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10:10 The exit plan in the current climate - Operating Partner perspectives

- A check list of non-negotiables before considering an exit
 - How are exit plans and strategies being affected by current market conditions?
 - What are the main challenges faced when preparing for exit?
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10:50 Networking break

PEI To learn more, visit: privateequityinternational.com/opecu

11:10 Showcasing functional specialist initiatives that move the needle

- Highlighting first year transformations through the lens of different functional specialists
 - The increasing role of AI across all functional initiatives
 - Operating partner success stories across the value creation ecosystem
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INTERACTIVE WORKING GROUP SERIES C

11:50 Interactive Working Group 7 (for operating partners only) | A deep dive into the Operating Partner/CFO dynamic

- The role of the CFO in protecting value during an economic downturn
- Identifying the key challenges the Operating Partner and CFO must overcome to maximise value
- Best practices for fostering effective communication, trust, and mutual support between the Operating Partner and CFO

This session will allow the audience to join an interactive discussion with designated facilitators.

11:50 Interactive Working Group 8 (for operating partners only) | How sustainability can be used to drive value creation within portfolio companies

- Where to find genuine value enhancement in sustainability
- How to commercialize ESG appropriately
- How to drive DE&I in portfolio companies as part of value creation

This session will allow the audience to join an interactive discussion with designated facilitators.

11:50 Interactive Working Group 9 (for operating partners only) | GenAI and customer analytics: future commercial levers for your VCP

- Building a GenAI-enabled future: Adapting portfolio companies to resource alignment, cross-functional teams and capability development
- Strategies to strengthen data infrastructure and AI integration within a company

This session will allow the audience to join an interactive discussion with designated facilitators.

12:30 Networking Lunch

12:30 Women in PE portfolio operations lunch (invitation-only for operating partners)

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

13:30 Debate: Functional specialists vs generalists. What is seen as more valuable?

This session will explore the ongoing debate between functional specialists and generalists, examining the value each brings. Attendees will gain insights into which approach is currently seen as more valuable in today's evolving business landscape.

14:10 Heads of value creation perspectives: comparing models and team structures

- A deep dive into team sizes and structures
- What are the top 3 things that are done to support the operating team
- What does great look like in an OP?

14:50 PEI presents the 1st annual operating partners compensation survey results

15:10 Chair's closing remarks

15:20 End of conference