

# Operating Partners Human Capital Forum New York 2024

## Agenda

### Pre-conference events - Tuesday, March 26, 2024 Tavern on the Green, 67th Street & Central Park West

#### 5:30 - 7:45 PM Operating Partners Human Capital Forum Pre-Event Welcome Reception (invitation-only for operating partners)

Join the operating partners attending the Human Capital Forum at our opening reception. Exchange valuable insights with your peers in a relaxed setting and build your connections before the conference kicks off.

#### 7:45 - 9:00 PM Operating Partners Human Capital Forum Welcome Dinner (invitation-only for operating partners)

Join us for a private sit-down dinner designed exclusively for all human capital operating partners attending the Forum.

### Day 1 Wednesday, March 27, 2024

#### 7:30 AM Registration and breakfast

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#### 8:00 AM Human capital operating partners think tank (for operating partners only)

Led by your peers, this closed-door discussion will allow you to learn and share best practices of successful human capital and talent operating partners. Please select one of the two rooms:

##### Think Tank Room 1

##### Working with founder-led company CEOs

##### Facilitators:

**Emily Azevedo**, Partner and Head of Talent, Mainsail Partners

**Kristin Patrick**, Senior Operating Partner, Human Capital, New State Capital Partners

##### Think Tank Room 2

##### Maximizing the impact of your role as a human capital operating partner

##### Facilitators:

**David Cohen**, Partner, Human Capital, Kelso

**Marya Stansky**, Operating Partner, Portfolio Talent, New Mountain Capital

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### **8:50 AM PEI's welcome and chairman's opening remarks**

**Chairman: Tony Buffum**, Vice President of HR Client Strategy, Upwork

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### **9:10 AM The new and expanded mandate of the human capital operating partner in PE**

- Understanding why PE firms need a new talent strategy: how do human capital partners ensure the value creation plan's human capital focus is on point to strategically execute
- Sharing modern and innovative playbooks for value creation: what new and additional levers are most impactful in your role? How are you accelerating delivery?
- What does the new leadership playbook and agenda look like?
- Analyzing how industry, macro, and technology changes will affect the future function
- As we look to the future, what would you change, do more of, and improve to have even more impact?

**Moderator:**

**Ted Bililies**, Partner and Managing Director, AlixPartners

**Panelists:**

**Courtney della Cava**, Senior Managing Director and Global Head of Portfolio Talent and Organizational Performance, Blackstone

**Jimmy Holloran**, Partner and Head of Talent, American Industrial Partners

**Chris Trendler**, Managing Director, Head of Portfolio Talent, Madison Dearborn Partners

**Allison Walker**, Partner and Chief Talent Officer, FTV Capital

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### **9:50 AM Preparing human capital operating partners for the board**

- What topics are coming to company Boards related to talent and human capital? What talent topics are standard areas of focus for every Board meeting?
- What is a standard Talent agenda in Board meetings versus bespoke?
- Do you discuss CEO performance and Succession at the Board?
- Do Heads of Talent sit on Boards? How can Heads of Talent join a Board?
- How often do Heads of Talent speak to the Board? How should Heads of Talent prepare for Board meetings?
- Does sitting on a Portco Board create a conflict of interest?
- What are some Board trends that Heads of Talent must be prepared to address?
- How can Boards raise their game by having a Head of Talent as a Director?

**Moderator:**

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

**Panelists:**

**Tracey Abbott**, Director, Mubadala Performance Partners, Mubadala

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**David Cohen**, Partner, Human Capital, Kelso

**Renata Dinkelmann**, Managing Director, Head of Human Capital, Paine Schwartz Partners

**Jack Scott**, Operating Partner - Human Capital, FFL Partners

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### **10:30 AM Assessing CEOs and management teams across the lifecycle**

- Uncovering the best leadership assessments and tools to utilize with management teams to create alignment; what are the latest innovations in assessment?
- Sharing views on the ideal composition of executives and pinpointing/predicting what makes executives successful in private equity
- CEO performance review processes across the portfolio in different phases of the lifecycle
- How do you assess management teams in the due diligence phase? How do you approach the onboarding process?
- How do you identify and understand when you need a new executive member?
- How do you assess and engage with management teams while building and maintaining relationships both during the 100 days and beyond? How do you build trust to be able to scale faster?
- What do portco executives think is most important in the value creation plan across the lifecycle?

**Moderator:**

**Dennis Schroeder**, CEO, Leadership, Inc.

**Panelists:**

**Emily Azevedo**, Partner and Head of Talent, Mainsail Partners

**Camille DeLaite**, Operating Partner, Talent, Charlesbank Capital Partners

**John Knapp**, Operating Director, Portfolio Talent, Berkshire Partners

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

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### **11:10 AM Uncovering how human capital operating partners can achieve meaningful influence within PE firms**

- Having a strategic seat at the table: how can human capital operating partners/teams move from nascent buy-in to having meaningful power and influence within PE firms?
- How to define your role with the ability to drive real change within both PE firms teams and portcos
- What do best in class roles look like and how do you get buy in from senior partners and the deal team that clarifies and enables the full range of your capabilities to create differential value?

**Moderator:**

**Sean Mooney**, Founder and CEO, BluWave

**Panelists:**

**Brady Delaney**, Managing Director, Talent, Kohlberg & Company

**Bruce Ennis**, Chief Human Capital Officer, Heartwood Partners

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**Steven Maxwell**, Senior Vice President, Portfolio Human Capital, Audax Private Equity  
**Kristin Schroeder**, Operating Partner, Talent & Co-Head of Diversity and Inclusion, Welsh, Carson, Anderson & Stowe

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## 11:50 AM Networking coffee break

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### **INTERACTIVE WORKING GROUPS SERIES 1**

#### **12:20 PM Interactive Working Group 1 (for operating partners only) – Strategic integration of human resources in value creation through employee benefit program optimization and cost savings**

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

- How can Human Resources establish a strategic role in driving measurable cost savings aligned with the value-creation strategy goals of the private equity firm?
- What creative solutions can be identified within employee benefit programs to ensure cost savings while maintaining fiduciary responsibility?
- In the pursuit of achieving savings, how can a "do no harm" approach be implemented to avoid negative impacts on jobs and employee satisfaction?
- What strategies can be employed to develop metrics that effectively measure material returns resulting from Human Resources led cost-saving initiatives, and how can Human Resources stay adaptable to market dynamics during this process?

**Facilitators:**

**Todd Miller**, CEO, Risk International

**John Weaver**, Senior Director, Risk International

#### **12:20 PM Interactive Working Group 2 (for operating partners only) – Leveraging references as a tactical component in your human capital toolbox**

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

- Operating partners share lessons learned: what works best and what doesn't when it comes to utilizing references?
- Sharing strategic elements of forensic referencing to make the right decisions about candidates
- Discussing off sheet and back-channel referencing: how are you doing it and what resources and tools are you utilizing for it?
- What are the long-term benefits and advantages of applying strategic methodologies to references? Do you outsource it or do it in house?
- What tools and technologies are most effective to facilitate referencing and candidate tracking?
- How do you protect the confidentiality in handling the process?

**Facilitators:**

**PEI** To learn more, visit: [privateequityinternational.com/ophc](http://privateequityinternational.com/ophc)

**Steven Berman**, Executive Search Director, Accel-KKR  
**Eric Larson**, Managing Partner, Private Equity, Riviera Partners

**12:20 PM Interactive Working Group 3 (for operating partners only) – Accelerating decision making through data and analytics for the human capital functional: tracking done right**

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

- How do you develop KPIs and what are your leading human capital indicators of performance? What macro and labor data trends are you paying close attention to?
- AI, KPIs, metrics and data science for talent development and assessments: technologies used to build and assess teams
- What key metrics are you using for HR diligence and the onboarding process? What are you doing to enrich your firm and your investment partners with data and analytics?
- What metrics are you using throughout the different phases of the investment lifecycle?
- What tools are you using to automate talent processes?
- Sharing data driven insights to improve your operations cross functionally
- Efficiency metrics: how do you track your own talent team's ROI and performance?
- Uncovering key differences in metrics and tracking across sectors of investment

**Facilitators:**

**Myra D'Souza**, Managing Director, PwC  
**Carrie Duarte Steele**, Partner, PwC

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**1:00 PM Networking lunch**

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**BREAKOUTS I**

**2:00 PM Track 1 Accelerating talent to value in your due diligence to 100-day human capital playbooks**

- Is your human capital team/function taking on more responsibilities for due diligence?
- How do you influence the diligence process when you don't have carte blanche; how do you infuse human capital diligence into a process where it is missing? What is the pull-through on your end?
- What is your tactical approach to human capital and management team due diligence based on your value creation plan? How deep into the organization's structure are you going from a diligence point of view?
- How do you ensure your 100-day plan does not turn into a 500-day plan? What should be prioritized in the first 100 days vs. later stage? What are your top 3 talent related initiatives/goals in the early months at your portfolio companies?
- How does the PE talent function accelerate talent to value in the first 100 days and how are you measuring it?
- What's most challenging in the first 100-days talent wise in the current environment? How do you identify risks early on?

- What are the most important dos and don'ts when it comes to the first 100 days? How do you engage and build relationships with your portfolio companies in the early stage?

**Moderator:**

**Chris Smith**, Partner and Global Lead, HR, Human Capital & Private Equity, Leathwaite

**Panelists:**

**Robert Murray**, Senior Vice President, Portfolio Human Capital, Audax Private Equity

**Cara Nealon**, Senior Vice President, Talent, Portfolio Group, Bain Capital

**Steve Schloss**, Operating Partner and Head, Leadership Center of Excellence, Edison Partners

**Natalia Schmidt-Chiari**, Principal, Portfolio Talent and Organizational Performance, Blackstone

**2:00 PM Track 2 Organizational design and effectiveness to scale for long term growth**

- What are the latest trends in org design and how do you think about it?
- What are key indicators of org health? What are the most common indicators that a new org set-up is needed and how do you go about doing it?
- Who do you involve in the org design and strategy process? How do you ensure clarity in its purpose? What is required from a leadership standpoint to achieve your org design goals?
- What are the biggest risks and challenges in the implementation process? How do you deal with resistance and disruptive factors?
- How do you assess if the organizational design is delivering on its intended purpose? Are there specific KPIs that you utilize?
- What are the long-term implications of org design: how does it allow you to scale over 3-4 years? How do you align it to the value creation plan and investment thesis?
- Sharing lessons learned and what is needed in different stages of the investment lifecycle

**Moderator:**

**Tom Corbitt**, Founder and Managing Principal, Top Line Growth Partners

**Panelists:**

**Bernardo Arrospide**, Operating Vice President, Accel-KKR

**Maggie van de Griend**, Managing Director, Portfolio Talent, Warburg Pincus

**Keith Warren**, Senior Strategic Talent Advisor, LS Power

**BREAKOUTS II**

**2:40 PM Track 3 Succession planning: how to develop the next generation of leaders**

- What is the role of CEOs and founders in looking at succession plans? How are founders and CEOs thinking about the next generation internally? What should they be doing to teach and mentor for future success?
- What practices should organizations implement to develop the next generation into leaders?
- What are innovative approaches to how companies are governed with an eye to the future and getting the most out of your top talent?

**Moderator:**

**Morgan McKeown**, Talent Operating Advisor, Goldman Sachs Asset Management

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**Panelists:**

**Samantha Smith**, Principal, Portfolio Human Capital, General Atlantic  
**Debra Somers**, Senior Vice President, Portfolio Talent, Warburg Pincus  
**Davide Tesini**, Senior Vice President, Mubadala

**2:40 PM Track 4 Internal facing human capital operating partner workshop: tackling HR challenges within your PE firms**

- Discussing internal firm HR issues, challenges, and opportunities
- Uncovering internal recruiting best practices
- Leadership/partner succession: how do you think about internal promotions and advancement?
- How are you thinking about scaling portfolio operations/functional groups as the firm grows?
- What does a good firm culture look like?
- How is the current macro environment affecting your internal firm human capital strategy?
- What are you doing in terms of development of mid-levels and juniors to adapt/be resilient in changing environments?

**Facilitators:**

**Virginia Peters**, Partner, K&L Gates  
**Nicole Strait**, Chief of Organization Strategy, Norwest Equity Partners

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**3:20 PM Networking coffee break**

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**BREAKOUTS III****3:30 PM Track 5 Pushing DE&I higher up in the value creation agenda**

- Current state vs future state; how do you think, define, and map out DE&I
- How is the current economic environment affecting your DE&I initiatives? What has changed in the past 12 months?
- What initiatives are you taking to increase diverse representation at your portfolio companies? What recommendation do you give your companies on DE&I?
- Board diversity: sharing practical examples of what needs to be built out
- How do you identify and utilize your DE&I metrics? How do you measure diversity across the portfolio to make sure you're held accountable
- How do you work with CHROs on DE&I initiatives? What is actionable?

**Moderator:**

**Claudy Jules**, Partner, McKinsey & Company

**Panelists:**

**Bernardo Arrospide**, Operating Vice President, Accel-KKR  
**Kahena Joubert**, Principal, Diversity, Equity and Inclusion Business and Investment Strategy Lead, Ares Management

**Johnathan Medina**, Global Head of DE&I, Macquarie Asset Management

### **3:30 PM Track 6 An inside look into board construction, composition, and optimization**

- What are the skills you are looking to put on the board? What skills and experience are most often missing from boards?
- Assessing what is needed to be the most impactful board members
- How do you think about how to structure effective boards from an alignment point of view?
- What is the secret to the best board/CEO relationship? Why is it important?
- How many people from your PE firm are on the board? Do you have an independent director of the board? Are your boards getting bigger?
- Are operating partners on your boards? Should operating partners be on boards?
- How do you measure board effectiveness with metrics?
- How are you thinking about boards from a diversity point of view? What are the challenges associated with it?

**Moderator:**

**Jonathan Rice**, Partner, Private Equity and Alternative Assets Lead, NorthWind Partners

**Panelists:**

**Dana Allen**, Managing Director, Talent, Gauge Capital

**Kate Berkeley**, Managing Director, Talent, Gryphon Investors

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

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

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## **BREAKOUTS IV**

### **4:10 PM Track 7 Operating partner perspectives: what makes a great CFO?**

- What makes a good CFO candidate? How do you assess CFOs to be the right technical and organizational fit?
- Sharing war stories and challenges when it comes to recruiting the right CFO
- What are some critical ways you enable CFOs to be successful early in the investment?
- How do you assess and track CFO performance throughout the investment lifecycle?
- How can CFOs drive the value creation plan and what are the biggest challenges they are facing in this environment?
- CFO-PE dynamics: alignment, support, retainment, and development best practices

**Moderator:**

**Marc Prine**, Senior Advisor, 29Bison, A SolomonEdwards Company

**Panelists:**

**Steven Berman**, Executive Search Director, Accel-KKR

**David Finnie**, Partner, VF Advisors, Portfolio Resource Group, Renovus Capital

**Kate Griffin**, Director, Portfolio Talent, Bain Capital

**Jamie Jacobs**, Chief Talent Officer, Oak Hill Capital



#### **4:10 PM Track 8 Maximizing human capital value creation across the investment lifecycle**

- Comparing human capital playbooks throughout the key stages of the lifecycle
- When, how, and to what extent do talent partners get involved in the lifecycle?
- How do you add value pre-deal, and during the first 100 days, first 6 months, and in the first year? How are you operating during the hold period in the current climate?
- How do you approach strategic alignment to execute the investment thesis? How does your organization define success?
- What is your most unique accomplishment that has added significant value?
- Lessons learned from the battlefield: can you share examples of initiatives you thought would add significant value but did not?
- Showcasing talent value creation best practices for the exit

#### **Moderator:**

**Ruthanne Roth**, Founder and CEO, Aster Talent

#### **Panelists:**

**Caroline Carr**, Partner, Chief Human Resources Officer, Permira

**Danie Levy**, Independent Talent Partner

**Brennan Murray**, Partner, Talent, Cressey & Company

**Karina Sobieski**, Co-head, Portfolio Human Capital Practice, Advent International

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#### **4:50 PM Networking coffee break**

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### **INTERACTIVE WORKING GROUPS SERIES 2**

#### **5:00 PM Interactive Working Group 4 (for operating partners only) – Influencing and motivating portfolio company CEOs: what makes executives successful in current times**

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

- Comparison of traits that make up great portfolio CEOs: high performing vs. low performing
- How do you approach composition and motivation of high-performing management teams to drive long-term success for your company?
- How do you generate alignment with the leadership team on the value creation plan - distilling it down to key action, accountability and then tracking progress/productivity
- How do you help CEOs and deal teams work together most effectively? How can human capital operating partners help?
- How do you motivate the leadership team to be at their best together?

#### **Facilitator:**

**Dina Wang**, Partner, ghSMART

#### **5:00 PM Interactive Working Group 5 (for operating partners only) – Workforce management as a driving force in human capital value creation**

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

- Understanding the most important nuances of broader workforce evaluation
- How to scale rapidly with change readiness at all levels within your organizations: uncovering how to fully activate talent and work together in new ways
- Looking at productivity deeper into the organization; KPIs across functions; looking at your top and bottom performers across functions
- Setting up a data driven process to make decisions when it comes to labor
- Getting your broader workforce aligned on the value creation plan
- How to empower and enable middle managers to align the workforce
- How are you strategically allocating people and resources and empowering your top talent to maximize impact?

**Facilitators:**

**Greg Harmeyer**, Co-Founder TiER1 Performance, CEO TiER1 Impact

**Christopher Kim**, Principal, Head of Human Capital, Platinum Equity

**5:00 PM Interactive Working Group 6 (for operating partners only) – The evolution of human capital: shifting paradigms, embracing science, creating increased value**

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

- How are longer hold periods affecting the execution of the value creation recipe? Given longer hold periods, what are you doing to increase leadership depth and readiness for different environments?
- How best practice is moving beyond simple recruitment and search and embracing organizational psychology tenets and data
- Understanding the hidden gem of organizational psychology and how this expertise helps firms create alpha
- What types of investments are necessary to support your human capital now and in future?
- Sharing modern tips, vehicles, and solutions for assessments—for selection and for development
- How are you accelerating the onboarding process of acquired management teams? Best practices in proactively managing integration, expectations, and conflict
- What is being done below the C-suite to develop mid-level leaders to scale appropriately?

**Facilitators:**

**Sandy Fiaschetti**, Founder and Managing Partner, Lodestone People Consulting

**Bachul Koul**, Director, Warburg Pincus

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**5:40 PM End of day 1 and networking cocktail reception**

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**Day 2 Thursday, March 28, 2024**

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## 7:30 AM Registration and breakfast

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### 7:45 AM Human capital deep dive breakfast discussion 1 (for operating partners only) – Operating partner-CHRO dynamics: an inside look at strategic partnerships

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

- How is the role of the CHRO changing/evolving? How are new work models affecting the role of the CHRO?
- What makes a successful CHRO today? What challenges do portfolio CHROs face today? What should CHROs not be doing?
- What will the CHRO of the future look like? What needs to stay and what needs to go?
- How do you build relationships with CHROs, how do you engage and listen? What are the biggest challenges in working with CHROs?
- Working with CHROs as strategic partners: how do you coach your CHROs to understand EBITDA? How do CHROs and PE firms align to address issues and transformations? In what ways can operating partners have the greatest impact on providing strategic alignment and delivery of the value creation plan?
- How are you working with CHROs to attract, develop, and retain talent?

#### **Facilitators:**

**Ted Bililies**, Partner and Managing Director, AlixPartners

**Jason McDannold**, Partner and Managing Director, AlixPartners

#### **Hosted by:**

**AlixPartners**

### 7:45 AM Human capital deep dive breakfast discussion 2 (for operating partners only) – Executive team recruitment and performance: upgrade your influence and effectiveness

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

- The insights you need on each member of your Executive Leadership Team
- How to influence stakeholders when ELT changes are essential...but not recognized by all
- How to specifically gain support from deal teams, CEOs & Boards and get them to act decisively
- How to lean on external talent advisors to make smoother, smarter ELT changes
- How to activate intelligence to maximize ELT performance

#### **Facilitators:**

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

**Scott Jacobs**, Partner, Acertitude

#### **Hosted by:**

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### **8:30 AM Think tanks for full-time operating partners – talent value creation war rooms (for operating partners only)**

Invitation-only think tank for full-time PE and VC operating partners and talent partners. This closed-door discussion will allow you to learn and share best practices in human capital portfolio operations. Please select one of the rooms:

#### **Think Tank Room 1: Heads of the human capital/talent function**

**Facilitators:**

**Lori Ali**, Managing Director, Head of Talent, PSG

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

#### **Think Tank Room 2: Professionals on a team of human capital operating partners**

**Facilitators:**

**Wes Cole**, Portfolio Talent Lead - GS Value Accelerator, Goldman Sachs

**Morgan McKeown**, Talent Operating Advisor, Goldman Sachs Asset Management

#### **Think Tank Room 3: Training for new & emerging human capital/talent PE professionals**

**Facilitator:**

**Mara Edgar**, Managing Director, Human Capital, The Riverside Company

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### **9:25 AM Chairman's welcome**

**Chairman: Tony Buffum**, Vice President of HR Client Strategy, Upwork

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### **9:30 AM AI's impact on the talent function in PE and the future workforce**

- How will AI change the talent function in PE? What is innovative from an AI perspective in talent? Will AI become more prominent within the talent function?
- Sharing practical use cases: how are you using it? What should talent operating partners be using and doing now for impact?
- How have you or your portfolio companies been leveraging generative AI on the recruiting/interviewing, assessment, or professional development front? How do you best use data with AI?
- How are you looking at AI across job functions and the different levels within companies: how will workforces and headcount be impacted by it in future?
- How do you create better workforce alignment around AI? How can CHROs help their workforces better grasp and work with AI?

**Presenters:**

**Tony Buffum**, Vice President of HR Client Strategy, Upwork

**John Sander**, Principal, Portfolio Solutions, Lightyear Capital

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### **10:10 AM Building the talent function at your firm from year one to year three and four**

- Comparing team structures, sizes, roles and responsibilities within the human capital teams

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- Uncovering how firms have built out their teams and what their real focus is when making a third hire or second hire
- How does a team of 1 operate differently vs. a team of 3? How do you drive the most value individually and as a team?
- What do you insource versus outsource? Why?
- If you are new in the talent partner role at your firm, how would you define your value?
- How do you grow the talent function after year 3 or 4 and how do you work differently with your operating partner team in year 3 or 4? Are you expanding your teams?
- What are some innovative practices you have built out within your firm to scale and optimize the talent function?
- If you were starting your practice area from scratch, where would you start?
- How do you manage supporting the needs of the portcos with those of your PE colleagues? What's important to consider in finding the right balance for your time and focus?

**Moderator:**

**Kristin Murphy**, Vice President, Private Equity and Partnerships, Entromy

**Panelists:**

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

**Christian Grados**, Principal - Portfolio, Talent Management & Organizational Effectiveness, Apollo Global Management

**Tanya Hayes**, Partner, Human Capital & ESG - Center of Excellence, Frazier Healthcare Partners

**Maddy Hopsicker**, Operating Partner, Talent, Summit Park

**10:50 AM Strategic talent acquisition across functional areas: sharing playbooks beyond C-suite level hiring**

- Recruiting and hiring top talent across finance, tech, HR, and sales from leadership to front-line
- How do you ensure your hires fit the value creation plan, investment strategy, nuances of the job, and company culture designed to succeed?
- What are key similarities and differences across various industries/sectors of investment?
- Sharing war stories, networks, and cost-effective methods that work
- What is your greatest challenge when it comes to recruiting in this environment? How do you get searches done faster?

**Moderator:**

**Dina DeMarco**, Division President - Private Equity Talent Solutions, Hueman

**Panelists:**

**Conor Leamy**, Chief Talent Officer, Shore Capital Partners

**Emily Terry**, Vice President, Human Capital - Center of Excellence, Frazier Healthcare Partners

**Reid Terry**, Director, Talent, Trivest Partners

**Jess Weber**, Head of Talent, Prelude Growth Partners

## 11:30 AM Networking break

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### **INTERACTIVE WORKING SERIES 3**

#### **11:50 AM Interactive Working Group 7 (for operating partners only) – The future of work: where are we now?**

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

- How are you quantifying in office vs. out of office? What data are you using for back to office vs. remote?
- What is your current approach, and do you expect it to change over the next year or so?
- How are you addressing the tension between companies that want execs in office/near HQ and top candidates pushing back and looking for greater flexibility?
- What % of your new portco hires are hybrid vs. remote vs. in office full time?
- What hybrid approaches are you seeing that are most effective?
- What do you expect the future of work to look like given changes driven by technology, demographic shifts, and the changing expectations of talent? How must companies respond to harness new technologies and effectively lead and engage the new workforce?

#### **Facilitators:**

**Tracey Abbott**, Director, Mubadala Performance Partners, Mubadala

**John Frehse**, UKG Workforce Institute Advisory Board Member

#### **11:50 AM Interactive Working Group 8 (for operating partners only) – Workforce compensation: uncovering modern trends, models, and metrics**

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

- As PE becomes more of a mature industry, how do you best deal with executive compensation, negotiations, and requests?
- How effectively are you doing comp benchmarking up and down the ranks?
- What are the latest and most creative compensation packages you are seeing? What types of equity/compensation packages is your workforce asking for?
- How are you motivating and incentivizing employees across the different levels to retain them in this environment?
- Equity vs. non equity in lower levels
- Inflationary and economic pressures on compensation – how do you get the best talent in this market while staying within budget?
- Large cap vs. mid vs. small: sharing key differences and similarities in comp models across companies

#### **Facilitator:**

**Dhruv Mehra**, Partner, Private Equity and M&A Advisory Services, Mercer

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## 12:30 PM Networking lunch

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### **12:30 PM Women in PE portfolio operations lunch (for operating partners only)**

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

- Exploring career paths, development, and how to position yourself as female leaders
- What are the biggest challenges and missed opportunities when it comes to women's leadership in PE?
- What traits and qualities do you search for and value most in women leaders at your companies?
- What initiatives are you driving for women on boards across portcos? What can be done better?
- How to best support incoming women leaders at portfolio companies, especially if they are new to being in a male dominated industry

**Facilitators:**

**Marla Capozzi**, Partner, McKinsey & Company

**Jamie Jacobs**, Chief Talent Officer, Oak Hill Capital

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

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### **BREAKOUTS V**

#### **1:30 PM Track 9 Transforming culture at your companies: what does good look like?**

- Company culture is always a critical component for driving value in companies, what are you leading now and through the next year related to culture?
- Looking at key elements of culture in the due diligence and post deal phase
- What does a healthy culture look like at your companies?
- How do you align culture to the value creation plan? What are the biggest challenges in this area?
- How do you maintain a healthy culture in a remote/hybrid world and across geographies?
- What effective tools, metrics, and diagnostics are you using to evaluate your portco's culture on an ongoing basis?

**Moderator:**

**Micah Alpern**, Senior Managing Director, Teneo

**Panelists:**

**Katie Czerepak**, Operating Partner and Head of Talent, Tech Opportunities, Bain Capital

**Dan Meyer**, Talent Partner, Align Capital Partners

**Michelle Nasir**, Former Chief Talent Officer, Arsenal Capital Partners

**Darcey O'Halloran**, Operating Partner, Talent, Artemis

#### **1:30 PM Track 10 Portfolio case study: CEO perspective –The ROI of senior team optimization**

- Before: The business context, the challenge, and the CEO's concerns; why did the CEO invest in the process and what problem were they solving?

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- The Process/Approach: What did we do, how did we do it, who was involved, how long did it take, and what was the investment?
- The Outcomes: For the team; the impact on business performance; key insights, lessons learned, and personal development for the CEO

**Interviewers:**

**Najeeb Ahmad**, Principal and Co-Founder, Pennington Human Dynamics

**Scott Willett**, Principal and Co-Founder, Pennington Human Dynamics

**Interviewee:**

**John Dandolph**, President and CEO, Alkegen

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**2:10 PM Human capital best practices in the current economy: financial implications for 2024 and beyond**

- How is the current macro environment shaping PE and the human capital function in PE?
- Who are the best leaders for these extremely disruptive conditions we are facing? What do they do that's different, and why?
- How are longer hold periods impacting your human capital strategies and what are you doing to retain talent in this environment?
- What does the future hold in an upcoming election year? How are you managing that now and preparing for it looking forward? What are you seeing already?

**Moderator:**

**Kim Coppola**, Principal, Mercer

**Panelists:**

**Ashley Day**, Operating Partner - Human Capital, FFL Partners

**Geri House**, Chief People Officer, Platform Partners

**Diana Martz**, Principal, Human Capital, Strategic Resource Group, TA Associates

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**2:50 PM Closing remarks and end of conference**