

Operating Partners Human Capital Forum New York 2024

Preliminary agenda

Pre-conference events - Tuesday, March 26, 2024

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 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

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

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

Think Tank Room 1

Mid-market: comparing human capital team structures and models

Think Tank Room 2

Large cap: comparing human capital team structures and models

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

9:10 AM New vs. old talent value creation levers: an inside look at the evolution of the human capital function/role and what comes next

9:50 AM Uncovering how human capital operating partners can achieve meaningful influence within PE firms

10:30 AM Assessing CEOs and their management teams in the diligence phase

11:10 AM Preparing human capital operating partners for the board

11:50 AM Networking coffee break

INTERACTIVE WORKING GROUPS SERIES 1

12:20 PM Interactive Working Group 1 (for operating partners only) – Compensation modern trends: tools, benchmarks, and data for operating partners

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

12:20 PM Interactive Working Group 2 (for operating partners only) – Tactical tips to work with human capital third parties

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

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:

1:00 PM Networking lunch

BREAKOUTS I

2:00 PM Track 1 Effective talent acquisition and retention strategies in the current environment

2:00 PM Track 2 Succession planning: how to develop the next generation of leaders

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

BREAKOUTS II

2:40 PM Track 3 Workforce management as a driving force in human capital value creation

2:40 PM Track 4 Accelerating value creation: 100-day human capital action plans for success

BREAKOUTS III

3:20 PM Track 5 Transforming culture at your companies: what does good look like?

3:20 PM Track 6 How to push DE&I higher up in the value creation agenda

BREAKOUTS IV

4:00 PM Track 7 Sharing how human capital operating partner specialists work best with other functions at portfolio companies

4:00 PM Track 8 The modern CFO: recruitment, training, and development best practices

4:40 PM Networking coffee break

INTERACTIVE WORKING GROUPS SERIES 2

4:50 PM Interactive Working Group 4 (for operating partners only) – The modern C-suite: what makes executives successful at your companies in current times

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

4:50 PM Interactive Working Group 5 (for operating partners only) – Fundamentals of human capital portfolio operations: training for professionals new to PE

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

4:50 PM Interactive Working Group 6 (for operating partners only) – Effective operating partner-CHRO dynamics and partnerships

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



5:30 PM End of day 1 and networking cocktail reception

Day 2 Thursday, March 28, 2024

7:30 AM Registration and breakfast

7:45 AM Human capital deep dive breakfast discussion (for operating partners only) – An inside look at women’s leadership in PE: challenges and opportunities

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

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

This closed-door discussion will allow you to learn and share best practices of successful human capital and talent operational models.

Think Tank Room 1: Working with founder-led company CEOs

Think Tank Room 2: Maximizing the impact of your role as a human capital operating partner

9:25 AM Chairman’s welcome

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

10:10 AM Growing the talent function at your PE firm from year one to year three and four

10:50 AM CHRO perspectives: sharing inside views from portfolio companies in working with PE

11:30 AM Networking break

INTERACTIVE WORKING SERIES 3

11:50 AM Interactive Working Group 7 (for operating partners only) – Internal facing human capital operating partner workshop: tackling HR challenges at your PE firms

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

11:50 AM Interactive Working Group 8 (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:

11:50 AM Interactive Working Group 9 (for operating partners only) – Tactical plans for human capital due diligence beyond the basics

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

12:30 PM Networking lunch

BREAKOUTS V

1:30 PM Track 9 Focusing on the S in ESG: operating partner views on what matters most

1:30 PM Track 10 Organizational design and effectiveness: how to design a scalable organization for long term growth

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

2:50 PM Closing remarks and end of conference