



**Private Equity
International**

Operating Partners Human Capital Forum

New York 2023

Post-Show Summary

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Introduction

from Human Capital Forum Chairperson, Tony Buffum

Thank you for your interest in the content from this year's Private Equity International – Operating Partners Human Capital Forum. Either you attended and would like to compare notes, or you unfortunately missed the event and are hoping to get some insight on what you missed. In both cases, I'm happy to share my notes and takeaways with you. This document only contains details from the large group sessions and a few small groups I attended, so it is not intended to be an all-inclusive document. Instead, please leverage it as an aid as you reflect on your experiences and interactions, or as an insight into themes touched on throughout the two days. Overall, I hope you were able to learn some new methods, practices and concepts, and make some great new network connections. Please reach out to me at tonybuffum@upwork.com, or on LinkedIn if you would like to discuss any of this further, learn more about Upwork, or just keep in touch. Thank you!

Overview

This was a very impressive event that included ~100 speakers from PE firms of all different sizes and industries, but all focused on similar objectives - how to address Human Capital (HC) challenges of today and anticipate/prepare for changes in the future. The perspectives and experience shared were tremendous and diverse, so no summary could do it justice, but I did identify some themes I felt stood out and resonated across panels/speakers:

- **HC is Evolving as a function:** Evolving the Human Capital (HC) team/function to extend beyond executive search and placements to become more deeply involved in PortCos and Deals. The most mature teams get involved pre-deal to build plans, stay involved post-deal (particularly in the first 180 days) to help execute plans and establish the foundation, and establish HC rhythms (and/or integrate into Business rhythms) to review performance, succession, development, etc.
- **The C-suite is changing:** The C-suite roles have evolved to include a greater emphasis on Social Skills than Business and Financial acumen. The sentiment was that the best way to weather the dynamic marketplace is to have leadership that can empathize, communicate, and lead. The more tactical execution and expertise can be leveraged as needed via advisors, etc.
- **Navigating stages of the HC journey is broad and varied, but follow similar paths:** Every firm is clearly in different stages of this journey and navigating it the best they can as fit for their firm. In my opinion, this journey is the same that HR went through about 20-25 years ago - building trust through execution of fundamentals, demonstrating additional value, then stepping up as trusted advisors to influence strategy and vision. HC leaders of the most mature programs had an HR background.



Tony Buffum
VP, HR Client Strategy
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Bring Tony Buffum to Your Next Portfolio Leaders Event!

If you are interested in hosting thought leadership for your portfolio companies, PEI Human Capital Forum Chairperson and Upwork's VP of HR Client Strategy, Tony Buffum, offers a variety of thought leadership topics to present to your portfolio companies.

To schedule Tony Buffum for your next portfolio leaders event, please email tbuffum@upwork.com

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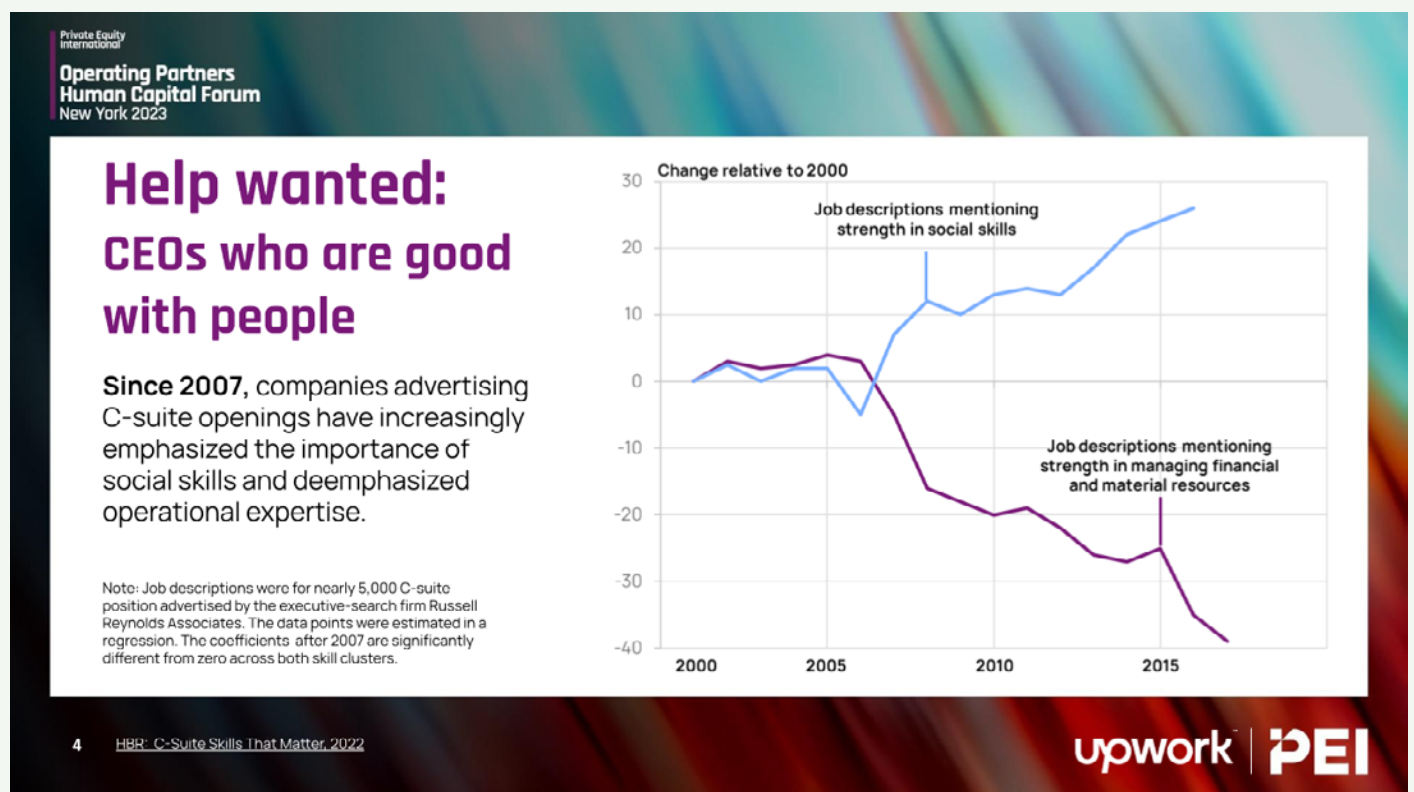
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PEI's welcome and chairman's opening remarks

Tony Buffum

- Today, firms want executives who can lead and inspire diverse, tech-savvy, globally distributed workforces. Twenty years ago, that was a lot different. Now, "what right looks like" is not enough.
- Today's executives need more than profit & loss acumen; they need people and leadership understanding.



HBR mapped the occurrence of this phenomenon over the last 15 years: C-suite searches emphasize strong social skills over traditional finance and operational skills.

- Technology has evolved access to a broader tool chest. As a result, there are options for every function and every need on a fractional/interim basis, which can help supplement a strong social leader, or provide coverage while looking for one.
- Technology in HR can be maximized when you adopt a workforce ecosystem approach: a workforce structure that extends beyond full-time and part-time employees to include fractional talent and partner organizations, as well as technology.

Investor perspectives: discussing what your deal team wants and needs from you

How do you think differently about the talent function over the last five years?

- Not long ago the function was non-existent. The activities were inconsistent and widely varied. Now, we see a more systematic approach:
 - Deep-dive talent review in diligence
 - Annual review of performers across companies
 - Scorecard mapped to interviews to structure assessment of executives.
- “The single most important role in the industry.”
- Used to be very reactive, so late to identify problems and make changes. Critical support in DD but also the first six months helps make it more proactive and impact value faster.
- The deal team previously wore all of the hats, but as things have changed, most realize they don’t have the training to be effective with talent issues. Now Talent Officers act as trusted advisors and are involved throughout the entire deal timeline.

What are you expecting for human capital in the future?

- It has moved from just search, to more proactive with all talent.
- While HC leaders are still working to be more consistent, nothing is standard in PE. And the same holds true deeper in the firm.
- HC leaders will build a network of retired, experienced executives who can advise teams as needed.

What do you expect from HC leaders early in the journey of creating the function at the firm?

- Perfect the basic blocking and tackling and give the deal teams leverage.
- Own the executive search process.
- The next level is being a strategic thought partner, so it requires really understanding value creation plans and knowing how talent strategy maps to those plans. Don’t expect a detailed understanding of the economics, but you should understand the broad strokes of the value creation levers. Know how those levers map to the talent strategy.
- Support the firm leaders with assessments and interviewing - things that seem like basics for HC. Help build out the business case for people, assessment, etc.

Deal folks think they have a nose for talent. How do you confront that?

- Remind them how many times the CEO that got you to the table is actually the one that gets you to exit.
- Figure out which partners will provide the most receptivity and prove it out with them first.

Within investment strategy, we still don't see many HC folks on boards. Is talent considered in evaluating the investment?

- Yes, it's critical to decision-making when assessing a company.

When in a competitive situation for a business, how do you get a look at management?

- It's tough in a really competitive "sprint" process. In some cases, you can bring in a partner to do a full leadership assessment, but it's a rare case.
- In most situations, it doesn't stop the deal anyway but informs decisions after the deal, so getting in to engage as soon after the deal as possible is just as critical.

The evolution of the human capital function in PE: comparing successful models today and what will be required in the future

How is the role of human capital evolving, and what skills do you see needed in the future?

- It's always about executive talent and mitigating search, but the bigger play is optimizing talent. Teams need more focus on ESG, so "S" elevates talent leadership more.
- Building a plan for what the company ought to do isn't hard. Failure happens when teams and talent aren't aligned or capable. Talent is looking more upstream.
- To keep pace, you need to build out capability within the businesses to create availability and scale for you, then build the toolkit across functions. Elevate the function and be a great steward and student of the businesses.
- The best endorsement of your ability as an advisor and partner comes from the CEO, not necessarily the deal partner. Flip from reactive (how to get butts in seats) to implementing talent systems proactively.

How do you work with external partners?

- Think of them as members of the team. Cultivate strong relationships so you get high-quality work. Also, being open to other partners and different methodologies and ideas.
- Focus on what's easy to outsource vs. where you can have the biggest impact and value to the firm. Then identify what the function won't do and align that with the firm and deal teams.

Takeaways for people new in the role?

- It's important to bring CHROs together to build on time together to evolve the team, learn, upskill, and enable more strategic thinking.
- Create a sharing network so the HC leader is not the "router" for all questions.
- Leverage data within the talent function, particularly for leading indicators for engagement and turnover.
- Build out talent development programs.

How are HC Leaders optimizing talent?

- Build out scorecards and other assessment tools for evaluating executive leadership. Discuss and review the team, but prioritize roles where time should be spent.
- Annual review of talent should be a minimum. Answer a few questions, like: Are we backing the management team? Who are the right ones for an exit? Is it ok to have B players, or do we need top-grading? Also include high-potential identifying.

How do you link scorecards to actual value creation?

- Using an ESG framework enables standardization and links to financial performance while creating a common definition across PortCos and enabling PE benchmarks more broadly.

How to assess culture in DD?

- If a survey is possible, that's great, but there's nothing better than ensuring you're involved in the early stages of the deal in an informal way. Understand how the team actually works together and perceptions of the team. Make sure you're facilitating conversations across Deal and Operators to get input and feedback for the talent roadmap.

How to get a CEO to value HR?

- Share takeaways from the CHRO round tables with investment teams so they know what's top of mind and important for the CHROs.

Operating partner human capital strategies across the entire investment lifecycle

HC Strategies across the lifecycle?

- Great deals need great people. Get involved very early in the diligence process. Understand underwriting cases and assess talent to build out a talent plan. Review the portfolio talent every quarter and constantly refresh succession plans with an eye toward the exit.
- For sign to close, the deal will determine if you get involved pre-deal. Otherwise, get significantly involved post-deal as part of the first 100 days.
- For founder-backed companies, engage with the founders early on to ensure they're aligned with business building. Start the "eyes wide open" approach as early as possible to ensure it goes smoothly post-close.

CEO Assessment - "Talent" book - when a CEO move is necessary, and the placement decision was wrong, it had a significant impact on IRR. When it was right and within a year, the return was 6x greater.

- Ensure the C-suite is suitable for the market and identify support internally.
- For founders and first-time CEOs, invest in coaching and external support. 360s that are development-oriented vs. evaluative. May leverage board members and/or 3rd parties to create a safe space for development.

How to make the decision on the C-suite when it's very close?

- Reverse-engineered top performers:
 - Incredibly high empathy
 - Purpose-driven
 - High on independence and collaboration
 - Incredibly agile from a learning perspective - growth mindset, take coaching and feedback
 - High self-awareness

How are you building trust, and how are you supporting the CEO to scale faster?

- CEOs can perceive human capital as scary. To ease their fear, you need to figure out what will deliver value and make an impact most quickly (usually talent acquisition and recruiting, so if you land that great talent for them, they want to discuss more).

Playing a role in value creation plans?

- To do it right, you need to align early on to provide input on determining what talent is necessary to achieve VCP and what actions need to be taken to deliver on those talent needs.
- According to research Entromy did with BluWave, only about 1/3 of HC is involved in VCP and DD, and the other 60% are just focused on recruiting.

How do you ensure leaders are optimally performing throughout the lifetime of the investment lifecycle?

- Get the deal team aligned with tracking performance. Ideally, you have a scorecard and leverage it across each function officer. Force the conversation quarterly. The biggest issue is waiting too long to drive a change. It's important to build a cadence and drive accountability to it.
 - Quarterly Reviews used to be just financial, but now they include talent reviews. Trying to be hard graders, look for leading indicators.
 - Identify triggering action as soon as something turns yellow so that there is a bias for action.
 - Make the color-scoring not an evaluation but an intervention/action to drive focus on what needs to be done.
 - Create scorecards and success profiles based on the investment thesis, and don't change much afterward through the lifecycle.
 - Keep it Simple - Three-page deck for deal teams. Includes assessment the function is to scale (not just the executive).
 - Look holistically at the entire org health, as well.

The modern C-suite: uncovering the right leaders for turbulent economic times

CEO Capabilities for turbulent times?

- The agility of the CEO and broader team
- Improved communication skills for different conditions in multiple directions.
- Empathy, curiosity, loving change, change mindset
- The CEO must embrace the fundamentals of comms (town halls) and get other C-suites in front of people and customers.

Burnout concerns are rated high by the ALIX survey. How can you mitigate this?

- Translate objectives and operating plans into priorities that connect to employees for buy-in. Come together monthly to make sure you're on track. Push, but not all the way to the edge, and have back-channel comms (CPO is valuable for that).
- Build a rhythm and be willing to make changes and adjust. This creates more work, but it's required to move forward, which can be fatigue-inducing.

How does a CEO build strong, resilient, and motivated teams, particularly in the current environment?

- Communication is key. Having a good CEO experienced at building teams makes the HC role much easier.
- Focus on building a strong culture together. No jerks allowed, no toxicity allowed. Identify talent that complements each other and work well together. Create opportunities to build personal connections beyond work.

70% of PE Investments listed Leadership Effectiveness as the #1 lever for value creation. What's the best way for HC to support CEOs in this environment?

- Leverage advisors and mentors. Enlist an outside board member as a sounding board to help continue to develop and grow the CEOs.

The turbulence of the market causes dislocations and turnover among the team. How do you manage that?

- Even an outstanding CEO can suffer with diluted numbers right now. Be sure to objectively separate the talent from the results and compare them to what's available in the market. Have a bench of interim talent and be ready to start searches - likely looking for a different profile.

Workforce analytics: tools, technologies, and metrics for success

What has changed for leaders?

- Leaders must show they care and take a holistic approach to assessing potential performance. Interviews are a single point of contact and a less valuable indicator of overall performance and happiness.

Leading indicators of company performance.

- An established appraisal system
- Communications
- Links to company objectives
- Capabilities exist internally
- Can they attract exactly the talent they need?

Evaluating the best leaders.

- Tests to predict performance
- Do they have success defined?
- Look at cognitive (can do), motivation (will do), historical (have they done)
- SaaS Capital has a good measure for ARR to FTE - a benchmark of what good looks like.

Measuring Employee Engagement

- ENPS: measure quarterly with one question, along with qualitative feedback.
- Good Job score assessment tool: assesses the jobs themselves to make sure they add value for the org and provide worthwhile roles.

AI Utilization

- Leveraged to help with staffing tasks, assessing engagement survey results, analyzing sentiment, etc. You need to guide PortCos where and when not to use it.

DEI and Trends

- Help organizations create, clean, and analyze their data, so they can begin investing time and effort into it. Sensitivity from the GP level has been relaxing, which enables engagement on the topics. But you still can't take it for granted and assume PortCos are on board. Keep pushing and ensure they're engaged.

Sharing fractional and interim work models: how are you doing it?

What are different models for interim leaders?

- Curated Network with specific functional or industry focus
- Broad marketplace (i.e., Catalant is more commodity)
- Alix Partners - will recruit and secure talent for you
- Informal Network among operating partners - likely the most dominant

How is interim search different from executive search?

- Must respond incredibly quickly compared to executive search and quickly assess technical skills and get to the client for fit
- You must have a lot of pre-vetted people on the bench
- Typically contingent basis vs. retained
- Be sensitive to pursuing multiple agencies at once because it can hurt the credibility of the search.

Compensation Model?

- Typically a weekly retainer (could vary, monthly or longer)

Interim Impact

- Can do the “dirty work” and help the permanent role start better
- Can redirect what you’re looking for in the permanent role
- Smoother transition
- Can support interviewing process

Firm Perspective on the Internal Service Model

- Arrives at all stages, even during DD
- Talent team is well-established, so OP knows to call
- Look into the internal database, then the internal team, then external partners - progresses very quickly
- Often reactive to turnover, plugging a hole

Accelerating value creation: 100-day human capital action plans for success

What is your role within the first 100 days?

- Know the knowable faster by identifying the things that will need to change or get done and prioritize ruthlessly on getting things right, so the company gets into maintenance mode asap.
- Assess where CEO spikes and ensure they have the right complementary skill sets around them. Spend time with the management team and ensure they collaborate effectively together.

How to approach building trust while making assessments?

- Honesty and transparency is best - acknowledge and own the assessment as part of the process. Talk about it early and before you sign. Explain how it helps understand culture, capabilities, and needs, and acknowledge that it may result in changes - and make them fast if so.
- Be sure to build the discussion around the management team and talent into the investor conversation - build the muscle. Use risk-mitigation tools (not decision-making tools) that help inform the team.

How to manage bandwidth and prioritize in your roles?

- You'll usually be most involved in the first year trying to implement changes and adjustments on less value-added activity to build reputation and credibility.
- It's Easy to stay busy and it feels good, but make sure to spend time in the right places, first by identifying top talent in companies, and second by rewarding strong performers. Prioritize big investments, complexity, and where their skill set is strongest.

How do you focus on Culture within the first 100 days?

- Consideration for making leadership changes
- Identified in Org Health Survey
- Can see it as a key enabler, or a feature that needs to be understood

What would you change if you could?

- Board prioritizing Talent Reviews early on

The modern CFO: recruitment, training, and development best practices

Vaya Study: 3 types of CFOs

50%

Driver

ambitious, outcome focused, courageous standing their ground when numbers support.

There is a subset that is more opportunistic and growth oriented.

30%

Operators

masters of the dashboard. They care a lot about ROI and long-term, but also efficiency now.

20%

Partners

good at leveraging interpersonal relationships internally. They work with the executive team in a close way and influence others to partner in order to find more value.

While Drivers and Operators deliver most EBITDA results, the greatest growth comes from someone that has a balance of all abilities.

What's a good CFO candidate based on your portfolio? Any non-negotiable?

- The most important skill is communication. The best CFOs are on top of things, can operate at the pace sponsors expect, and have the answers needed. They are strong leaders who are resilient, self-aware, and open to advice and seeking help. They stay close to the numbers and raise a flag when leading indicators go off. They are comfortable challenging the CEO, but also eagerly partner with them.

CFOs more successful because they're working with a great CEO?

- A great CEO contributes to the success of their CFO. They let people operate in their lane to enable strong relationships and success.
- The best CEOs attract the best CFOs. They often like seeing CFOs that were also COO in the past, and are not afraid to bring a challenger on.

How to get CEOs/Sponsors off of looking for perfection?

- Help them understand what the market will bear in order to identify what you can give on.
- Consider the domain, scale, and scope of the role. Hit at least 2/3. PE Experience and location are also important.
- There can be a prerequisite bias for CFOs that have previous experience with PE events, etc., but being open to other experiences can still be successful. Stop looking for the unicorn and ensure they have the right mentality and attitude.

What's different and what's changing in the market for CFOs?

- They don't want to be in the office full-time and don't want to travel.
- There is more openness to the step-up CFO. Number 2s are getting phone calls for CFO roles.
- Many companies want experience and skill in volatility to help newer CEOs navigate.
- More negotiation about what happens at the 5-years (anticipating longer hold period).

What do you do about CFOs that want to be CEOs? Important to growth and retention

- Put them on boards so they get visibility into smaller companies
- Formal mentorship programs with CEOs
- Transition into President role - open the scope of their role

Workforce transformations: how to build a digital culture at your companies

Digital Journey for Firms

- Digital transformation is at the forefront of every company focused on growth. To push it out to your portfolio companies, you needed to digitize internally within the firm first.
- Ask companies for data, which drives organizations to realize they need to improve their data and improve how they collect and track.
- It can be helpful to share what tools forward-looking (tech) companies are using to motivate/inspire, and what tools companies are using across PortCos.

Skills and Traits Needed Now

- Upgrade Talent where you need it - quickly
- Empathy - patience and support for non-digital natives.
- Ability to help other functions sell tech into the business
- EQ - critical for a modern leader, particularly due to changes taking place in the workforce.
- Digital and data literacy - you must know how to use modern technology tools
- Agility and adaptability - with immense change, you must digest and adapt quickly.
- Responsiveness - modern solutions allow for close to real-time responses, and so need to be utilized.

Barriers

- People are not open to change, especially when they feel like it's forced. You have to work more organically within teams, and can't mandate like in larger public companies.

CHRO perspectives: an inside look at PE operating partner-CHRO dynamics

- Remember that under the executive team, most teams don't understand VCP and all the terms PE firms bring to the table. Bring terms the teams can connect with.
- CHROs should be brought to the table sooner; let them in on the conversations around change management so they can help triage with the rest of the team.
- Most HR leaders want to be more strategic, but you need to support them and allow them to take task-oriented, back-office work off their plate.
- Prepping for an exit in regards to the people leaders needs to come much sooner than 30 days out. Whoever is buying the company will look at Glassdoor reviews; it's a no-brainer. Execs must be playing a key role 3+ years out to keep these strong.

**There was so much great input from this discussion that I couldn't capture because I was moderating it, but anyone interested in discussing this topic more should feel welcome to reach out to me directly.

Effective talent acquisition and retention strategies in the current environment

Advantages to having executive search in house?

- The mandate is to keep partners happy by getting the right talent in the right time and place. The time to fill from in-house is shorter. Make sure you know companies and management and deal teams deeply. Know the red flags are areas of concern that wouldn't be brought up early on if it was with a third party. Have your own network and deep benches due to regular searches.

Trends

- Candidate availability has increased a bit due to reduced deal flow and slower time to exits
- Finding the right talent is more competitive than ever in the last 3 years
- Overall frenzy in 21-22 has slowed, but still a lot
- More access to candidates, but less movement
- Due to change in stock/equity more are interested in the PE equity compared to their companies

Speed to hire best practices.

- Boils down to process - regardless of market conditions and how you drive it. Needs to be structured, focused, non-repetitive, efficient - not just recruiting/problem-solving exercise, but a branding exercise too.
- The differentiator is actually knowing the right people, not just having access.
- Marketing aspect is overlooked (very important)
- Start slow to end fast. Deal team wants talent yesterday, but needs to slow down to get information organized and aligned. Document the process and align on it up front.
- Communication early and often is key.
- Diligently manage and shepherd the process
- Provide tools - scorecard

Innovation in TA?

- Leveraging tech and AI to keep talent engaged and interested through communication
- Retention. Compensation matters, but being true to value proposition promised in the first place also matters.
- Talent Relationship Management Software: Thrive.

Organizational design and effectiveness: operating partner perspectives

With so many risks related to reorganization events, what are trigger points for doing it?

- Start thinking about org design during DD.
- When you identify that achieving the org goal is not possible with the current design.
- Pivot in leadership.

Optimal Org Design?

- Structure primarily solves for accountability
 - Functional
 - BUs - Geo, Product, Industry, Customer
 - Matrix - blend of both
- For M&A - BU structure is easier, because you just bolt on
- Think through leadership and organization readiness for the change
 - Distill the “why”
 - Communicate the impacts
 - How they’re going to carry it through

Who do you involve in the process?

- The CEO. If something breaks, make sure it's something the CEO will be able to work through.
 - Solving for adoption/alignment - broader leadership team.
 - Roles - lots of people
- Deal teams may have preconceptions about what the org design should look like.
 - Be prepared to defer to the CEO - they'll have to run it.
 - Deal team can approve - but try to avoid pulling them into the design.
- Identify who is figuring out leveling, comp bands, and communication if there's no CHRO; once the design is complete.
- Why CEO?
 - Sensitivity
 - Efficient

2-3 Risks in implementation of a new design

- Organizational resistance to change - be aware and address it right away
 - Be prepared to take action for comp or exits.
- People Surprises - Go into it with humility and back up plans.
 - Retention strategies
 - Manager Communications
- Job Design - make sure org design is considered and prepared to communicate the "how does this affect me?"

What are regional/international considerations when reorganizing?

- Often a lot more complex outside of the US.
- When they say it's different - believe them.
- Prepare to include the right people so you can make sure it is possible, and that timing is considered in case it will take longer.

Women in PE & VC portfolio operations panel: revealing key talking points from the event's closed-door lunch discussion

Poll Outcome - "Sentiment of most firms' leadership regarding women is: Conceptually in, but we just don't find as many quality female candidates as we do quality male candidates.

- Because the space for women in leadership roles is less mature, we find more informal processes that drive less positive environments for women. By and large, it seems that financial services and PE, etc. are the last to the party.
- While women may be new to this industry, qualified women are not new to business. As a group, we need to change the priority of this topic. Even at an event like this, the topic was last on the schedule and with 10% of the audience.

Facts and Data

- Hiring more junior women (33%), 14% senior employees
- For every level of promotion there is both more attrition and less promotion for women

Challenges

- Biggest barrier is lack of feedback. It contributes to an environment where women feel less inclined to keep going.
- Advocacy and allies is a responsibility to drive change in the organization.

Progress and solutions that are moving the needle?

- Words matter. Adjustments to gender biased language toward more inclusive or gender neutral words makes a difference.
- Attempting to hire based on "culture fit" can enable an unconscious bias.

Closing remarks

Tony Buffum

The world is changing, work is changing, and so are CEOs and HC as a function. Collaboration is the key to adapting to changes and staying on top.

This year's PEI event was about learning, exploring ideas, and identifying and sharing opportunities for your firm and companies. But more than just what was learned at this event, networking is about maintaining the momentum of that learning.

Sharing and networking can help provide agility and acceleration. Keep connecting and sharing what you learn and let's keep up the momentum.



Tony Buffum

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