

Private Equity  
International

# Operating Partners Forum

New York 2023

October 17-18  
Downtown Convene, 225 Liberty St, New York

## The premier academy for private equity portfolio company value creation

**Save 10%** when you book before **September 15**

**PEI**

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*The Operating Partners Forum is the foremost event where the largest ecosystem of operating partners, suppliers and resources gather annually.*

**Greg J. Pappas**

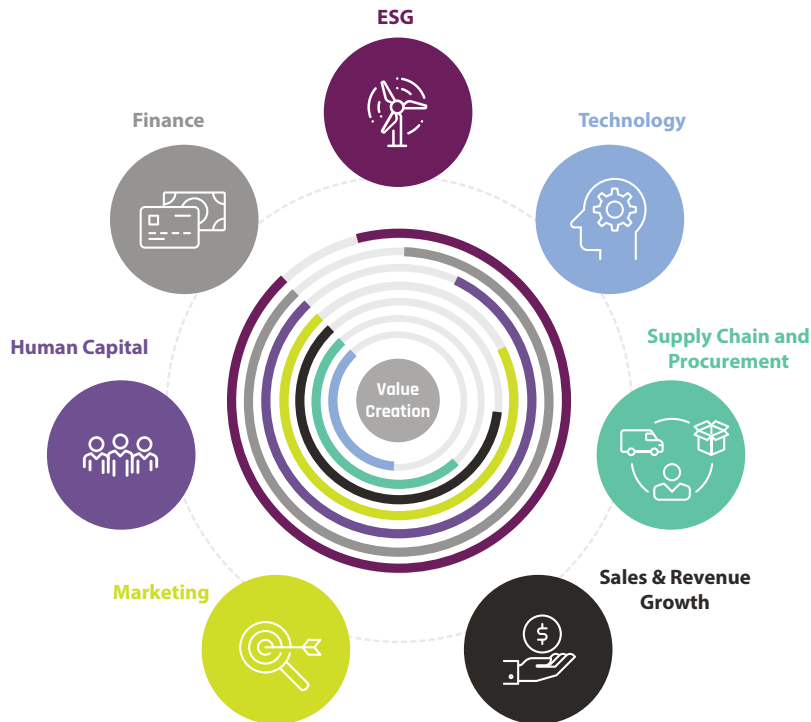
Managing Director,  
Portfolio Support  
**Berkshire Partners**

# Key Themes and Topics

Our agenda provides a holistic approach to portfolio optimization:

- » ESG
- » Finance
- » Human Capital
- » Marketing
- » Sales & Revenue Growth
- » Supply Chain & Procurement
- » Technology

## 360° value creation



# Sessions designed to help you accelerate value creation across functions



## **SALES & REVENUE GROWTH**

- » Maximize revenue growth despite an economic downturn
- » Uncover how top firms drive sales KPIs and metrics
- » Grasp characteristics of the most successful commercial/sales operating partner models
- » Understand the most important GTM levers



## **HUMAN CAPITAL**

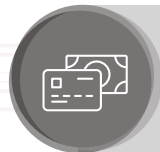
- » Maximize talent retention during challenging times
- » Hear new perspectives on DE&I in private equity
- » Understand the future of the human capital function in PE
- » Find the right C-suite and leaders to optimize performance



## **TECHNOLOGY**

- » Use AI and other current tech trends as key levers of value creation
- » Optimize cybersecurity efforts in today's world
- » Uncover cloud transformation success stories
- » Drive growth through data science and advanced analytics

# Sessions designed to help you accelerate value creation across functions



## FINANCE

- » Maintain the capacity to perform amidst cost-cutting initiatives
- » Optimize the operating partner-CFO dynamic
- » Implement technological innovations to drive efficient financial departments
- » Refine your finance playbooks from due diligence to the first 100 days



## MARKETING

- » Discover what it really means to have a shared methodology and common language across Marketing, Sales, and Customer Success
- » Hear operating partners share thoughts on digital marketing best practices
- » Analyze how best to track marketing performance and effectiveness
- » Learn how to utilize marketing as a growth lever in the first 100 days



## SUPPLY CHAIN & PROCUREMENT

- » Drive growth amidst supply chain disruptions
- » Utilize technology in your supply chain models to your advantage
- » Compare company vs. cross-portfolio supply chain cost initiatives
- » Deliver supply chain and procurement transformations



## ESG

- » The operating partner role in driving ESG initiatives
- » How to best use ESG-based KPIs and metrics
- » Practical approaches to accelerate value creation through ESG
- » ESG due diligence best practices

# Meet the speakers



**Omar Alismail**  
Head of Mubadala  
Performance Partners  
**Mubadala**



**Lisa Baldwin**  
Operating Executive  
**Evergreen Coast Capital**



**Brian Barnum**  
Operating Partner,  
Head of Private Equity  
Value Creation Team  
**Shamrock Capital**



**Alex Bello**  
Director, Product and  
Technology Strategy  
**EQT Group**



**Jessica Castillo**  
Operating Partner  
**Sovereign's Capital**



**Bruce Chesebrough**  
Operating Partner  
**New Mountain Capital**



**Richard Elder**  
Partner and Managing  
Director, Head of Global  
Portfolio Solutions  
**The Carlyle Group**



**Megan Galvin**  
Senior Operating  
Partner, Revenue  
**New State Capital  
Partners**



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



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

# Meet the speakers

[View all speakers ↗](#)



**Benny Melumad**  
Managing Director, Digital  
Strategy and Innovation  
**Warburg Pincus**



**Alessandro Moretti**  
Head of Operational Value  
Creation  
**Public Investment Fund**



**Monika Nachyla**  
Partner  
**Abris Capital Partners**



**Greg Pappas**  
Managing Director, Portfolio  
Support  
**Berkshire Partners**



**Andy Pickens**  
Managing Director  
**Apollo Portfolio  
Performance Solutions**



**Zorian Rotenberg**  
GTM, Sales and Revenue  
Growth Operating Partner  
**Charlesbank Capital  
Partners**



**Rachel Spasser**  
Managing Director, Head,  
Accel-KKR Consulting Group  
**Accel-KKR**



**Chris Tanner**  
Vice President, Portfolio  
Operations  
**Kelso & Company**



**Achi Yaffe**  
Managing Director, Portfolio  
Operations  
**GI Partners**



**Paul Zuber**  
Operating Partner,  
North American Lead  
**Hg**



# Networking opportunities



*The opportunity to connect with so many operating partners from across the globe, share best practices/stories of what's been working and/or challenging for their portcos was something unique.*

Bobbi Kommineni  
Terminus Capital Partners

## Advance your potential in sessions designed to foster connectivity and learning



### **BUILD MEANINGFUL CONNECTIONS**

Connect with peers and unpack lessons learned at the Forum in a series of designated networking breaks, evening receptions, and dinner discussions.



### **SHARE YOUR EXPERTISE**

Solve real-world problems in deep-dive roundtables and interactive working groups. Elevate your own portfolio companies in brainstorming sessions with other top value creators.



### **ELEVATE WOMEN IN PE**

Join a growing community of women in private equity portfolio operations. Engage with other female leaders in three exclusive closed-door discussions.



# Join the largest global community of private equity value creators

Confirmed attendees include:

- » Abris Capital Partners
- » Accel-KKR
- » ACON Investments
- » Advent International
- » AGF Latin America
- » AlixPartners
- » Alvarez & Marsal
- » Amazon Web Services (AWS)
- » American Industrial Partners
- » Apollo Global Management
- » Ara Partners
- » Astara Capital
- » Bain Capital
- » Barings
- » Beckway
- » Berkshire Partners
- » Blackstone
- » Blue Ridge Partners
- » Blue Wolf Capital Partners
- » BluWave
- » Brookfield Asset Management
- » BV Investment Partners
- » Catalant
- » Charlesbank Capital
- » Clayton Dubilier & Rice
- » Court Square Capital Partners
- » Deloitte
- » Entromy
- » EQT Group
- » Ethos Capital
- » Evergreen Coast Capital
- » EY
- » Falco Global Partners
- » Frazier Healthcare Partners
- » GI Partners
- » Graham Partners
- » Grain Management
- » Grant Thornton
- » GrowthCurve Capital
- » HCI Equity Partners
- » Hg Capital
- » Hudson Advisors
- » IFM Investors
- » Incline Equity Partners
- » J.F. Lehman
- » Kelso & Co.
- » KKR
- » KPS Capital
- » Lateral Investment Management
- » Level Equity
- » Liberty Advisor Group

# Join the largest global community of private equity value creators

Confirmed attendees include:

- » LKCM Headwater Investments
- » Marblegate Asset Management
- » Middleground Capital
- » Morgan Stanley
- » Mubadala
- » New Mountain Capital
- » New State Capital Partners
- » NextGen Growth Partners
- » Novacap
- » Oak Hill Capital
- » Onex
- » ORIX Capital Partners
- » Pamlico Capital
- » ParkerGale
- » Peloton Capital Management
- » Periscope Equity
- » Polaris Growth Fund
- » Providence Equity
- » Public investment fund
- » PwC
- » RSM
- » Salesforce
- » SAP
- » Searchlight Capital Partners
- » Shamrock Capital Advisors
- » Simon Kucher
- » Siris Capital
- » Sovereign's Capital
- » Spring Lane Capital
- » Strattam Capital
- » Summit Leadership Partners
- » Terminus Capital Partners
- » The CapStreet Group
- » The Carlyle Group
- » The Raine Group
- » The Riverside Company
- » The Sterling Group
- » Thompson Street Capital Partners
- » Traub Capital Partners
- » TVV Capital
- » Udata Partners
- » Upwork
- » Värde Partners
- » Vision Ridge Partners
- » Warburg Pincus
- » Wellspring Capital
- » Zenyth Partners

# Event tickets

**Save 10%** when you book before **September 15**

The Forum is designed to educate high performing operating teams across all functional areas of value creation. Enjoy significant discounts and gain knowledge from every session when you bring your whole team.

**Book your tickets today** ➞

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