

# Operating Partners Forum New York

## Agenda

### Pre-conference events - Tuesday, October 28, 2025

**5:30-7:30 PM** Operating Partners Forum NY Pre-Event Welcome Reception (invitation-only for operating partners)

**Venue:** *Gitano NYC, Waterfront, Pier 17, Seaport, New York*

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

**7:30-9:00 PM** Pre-Event Dinners (invitation-only for operating partners)

**Venue:** *Tin Building, 96 South St, New York, NY*

*Join us for private networking-style dinners designed exclusively for team leaders, functional specialist and generalist operating partners attending the NY Forum. You will receive an invite to select the dinner that best represents your role:*

**Heads of Value Creation - Team Leaders Dinner (invitation-only)**

**GTM, Sales and Revenue Growth Operating Partners Dinner (invitation-only)**

**Technology and Digital Operating Partners Dinner (invitation-only)**

**Finance Operating Partners Dinner (invitation-only)**

**Generalist Operating Partners Dinner (invitation-only)**

**Supply Chain and Procurement Operating Partners Dinner (invitation-only)**

**Human Capital Operating Partners Dinner (invitation-only)**

### Day 1 - Wednesday, October 29, 2025

**Convene Brookfield Place, 225 Liberty, Downtown, New York**


**7:30 AM** Registration and breakfast

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#### THINK TANKS SERIES 1

**7:45-8:30 AM** Think tanks for full-time operating partners: **value creation war rooms**  
(invitation-only for operating partners)

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



*These closed-door discussions will allow you to learn and share best practices of successful operating partners with your peers. Please select one of the rooms:*

**Think Tank 1 Digital and Technology Operating Partners**

**Think Tank 2 Human Capital/Talent Operating Partners**

**Think Tank 3 GTM, Sales and Revenue Growth Operating Partners**

**Think Tank 4 Finance Operating Partners**

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### **BREAKFAST DEEP-DIVE SERIES 1**

**8:30-9:10 AM Breakfast deep dive discussion 1 (invitation-only for operating partners)**

**Optimizing and measuring operating partner performance: comparing scorecards**

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

**8:30-9:10 AM Breakfast deep dive discussion 2 (invitation-only for operating partners)**

**Operating partner-CEO alignment: dos and don'ts**

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

**8:30-9:10 AM Breakfast deep dive discussion 3 (invitation-only for operating partners)**

**Operating partner-CTO synergies to maximize value**

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

**8:30-9:10 AM Breakfast deep dive discussion 4 (invitation-only for operating partners) How operating partners align and deliver value creation with CFOs**

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

**8:30-9:10 AM Breakfast deep dive discussion 5 (invitation-only for operating partners) Tariff impact analysis: comprehensive strategies to remain resilient**

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

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**9:10 AM PEI's welcome and chairmen's opening remarks**

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**9:30-10:10 AM Panel 1 The legends of value creation – what I wish someone had told me**

**9:30-10:10 AM Panel 2 Maximizing value creation planning early in the hold period: key steps**

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**10:10-10:50 AM Panel 3 AI's impact on Operating Partner-Deal team dynamics and the future of PE**

**10:10-10:50 AM Panel 4 Heads of value creation views: what does excellence look like in an operating partner and the team?**

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**10:50 AM Networking break**

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**11:20-12:00 PM Panel 5 The portco CEO perspective: key considerations for operating partners**

**11:20-12:00 PM Panel 6 The value of pre-exit value creation to strengthen and refine the investment thesis**

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**12:00-12:40 PM Panel 7 An inside look into the evolution of the operating partner role across the lifecycle**

**12:00-12:40 PM Panel 8 AI-led value creation in operations: showcasing real AI examples to transform business processes**

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

**12:40-1:20 PM Interactive Working Group 1 (for operating partners only) | Executive recruitment and retention in the current marketplace**

*This session designed solely for operating partners will allow the audience to join an interactive discussion with designated facilitators.*

**12:40-1:20 PM Interactive Working Group 2 (for operating partners only) | Optimizing your sales, marketing, and customer success processes**

*This session designed solely for operating partners will allow the audience to join an interactive discussion with designated facilitators.*


**12:40-1:20 PM Interactive Working Group 3 (for operating partners only) | Uncovering how to leverage Agentic AI and its future impact on VCPs**

*This session designed solely for operating partners will allow the audience to join an interactive discussion with designated facilitators.*

**12:40-1:20 PM Interactive Working Group 4 (for operating partners only) | Driving portco performance in the current economy: dissecting challenges and opportunities**

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*This session designed solely for operating partners will allow the audience to join an interactive discussion with designated facilitators.*

**12:40-1:20 PM Interactive Working Group 5 (for operating partners only) | Operating partner perspectives on how to best create alignment and synergies with investment partners**

*This session designed solely for operating partners will allow the audience to join an interactive discussion with designated facilitators.*

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**1:20-2:20 PM Networking Lunch**

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**FUNCTIONAL LUNCH SERIES 1**

**1:20-2:20 PM Functional lunch discussion 1 (invitation-only for operating partners) | Unlocking advanced pricing strategies: how are you thinking about it?**

*This closed-door deep dive lunch discussion designed solely for operating partners will focus on strategic areas to enhance value.*

**1:20-2:20 PM Functional lunch discussion 2 (invitation-only for operating partners) | A deep dive into market dynamics: employee benefits program optimization**

*This closed-door deep dive lunch discussion designed solely for operating partners will focus on strategic areas to enhance value.*

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**PANELS BREAKOUT SERIES 1**

**2:20-3:00 PM Track 1 Recruiting and selecting AI talent for your portfolio companies**

**2:20-3:00 PM Track 2 Bridging the gap: unifying GTM and finance for operational excellence**

**2:20-3:00 PM Track 3 Cybersecurity case study: CISO-OP alignment and effectiveness**

**2:20-3:00 PM Track 4 100-day finance value creation playbooks: operating partner recipes**

**2:20-3:00 PM Track 5 Working with founder-led company CEOs: operating partner insights**

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**PANELS BREAKOUT SERIES 2**

**3:00-3:40 PM Track 6 Building high-performance teams: alignment, accountability, and results**

**3:00-3:40 PM Track 7 Personalizing and refining your GTM playbooks**

**3:00-3:40 PM Track 8 Leveraging AI for the mid-market: firsthand implementations revealed**

**3:00-3:40 PM Track 9 Office of the CFO optimization: key drivers for M&A and exit readiness success**

**3:00-3:40 PM Track 10 Optimizing supply chain technology platforms: automation, collaboration, and intelligence**

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**3:40 PM Coffee break**

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### **PANELS BREAKOUT SERIES 3**

**3:50-4:30 PM Track 11 Leaders in AI: why firms now need an AI operating partner**

**3:50-4:30 PM Track 12 Commercial due diligence: strategic groundwork for long-term success**

**3:50-4:30 PM Track 13 Identifying the data metrics that matter to maximize value at exit**

**3:50-4:30 PM Track 14 Power pairing: unlocking value through the CTO-CFO partnership**

**3:50-4:30 PM Track 15 What makes a great supply chain/procurement operating partner: key insights from functional specialists**

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### **PANELS BREAKOUT SERIES 4**

**4:30-5:10 PM Track 16 Leveraging the human capital leader's role in thesis development and diligence**

**4:30-5:10 PM Track 17 The silent killers of value: addressing revenue leakage and cash flow blind spots**

**4:30-5:10 PM Track 18 The evolution of 100-day tech value creation playbooks**

**4:30-5:10 PM Track 19 Executive recruitment and selection of the modern CFO**

**4:30-5:10 PM Track 20 Value creation for industrials: success stories to drive returns**

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## **INTERACTIVE WORKING GROUPS SERIES 2**

### **5:10-5:50 PM Interactive Working Group 6 (for operating partners only) | The latest on broad-based employee ownership across organizations: comparing results**

*This session designed solely for operating partners will allow the audience to join an interactive discussion with designated facilitators.*

### **5:10-5:50 PM Interactive Working Group 7 (for operating partners only) | Unlocking commercial analytics to drive growth throughout the lifecycle**

*This session designed solely for operating partners will allow the audience to join an interactive discussion with designated facilitators.*

### **5:10-5:50 PM Interactive Working Group 8 (for operating partners only) | Comparing tech and digital operating partner models and ecosystems**

*This session designed solely for operating partners will allow the audience to join an interactive discussion with designated facilitators.*

### **5:10-5:50 PM Interactive Working Group 9 (for operating partners only) | The future finance function: strategic tech initiatives for the office of the CFO**

*This session designed solely for operating partners will allow the audience to join an interactive discussion with designated facilitators.*

### **5:10-5:50 PM Interactive Working Group 10 (for operating partners only) | Sharing notes on key priorities in year one to drive long-term value**

*This session designed solely for operating partners will allow the audience to join an interactive discussion with designated facilitators.*

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### **5:50-6:50 PM End of day one grand reception**

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## **Day 2 - Thursday, October 30, 2025**


**Convene Brookfield Place, 225 Liberty, Downtown, New York**

### **7:45 AM Registration and breakfast**

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## **THINK TANKS SERIES 2**

### **7:45-8:30 AM Think tanks for full-time operating partners: value creation war rooms (invitation-only for operating partners)**



These closed-door discussions will allow you to learn and share best practices of successful operating partners. Select one of the rooms:

**Think Tank 1 New Operating Partners (1-2 years in PE)**

**Think Tank 2 Advanced Operating Partners (3+ years in PE)**

**Think Tank 3 Heads of Value Creation: Team Leaders Think Tank**

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### **BREAKFAST DEEP-DIVE SERIES 2**

**8:30-9:10 AM Breakfast deep dive discussion 1 (invitation-only for operating partners) | The evolution and acceleration of change management: operating partner new playbooks**

*This breakfast deep dive discussion designed solely for operating partners will allow you to join an interactive discussion with designated facilitators.*

**8:30-9:10 AM Breakfast deep dive discussion 2 (invitation-only for operating partners) | The exit edge: actions that unlock 10%+ valuation upside in the last 18 months**

*This breakfast deep dive discussion designed solely for operating partners will allow you to join an interactive discussion with designated facilitators.*

**8:30-9:10 AM Breakfast deep dive discussion 3 (invitation-only for operating partners) | Operational due diligence in the age of AI: a new paradigm**

*This breakfast deep dive discussion designed solely for operating partners will allow you to join an interactive discussion with designated facilitators.*

**8:30-9:10 AM Breakfast deep dive discussion 4 (invitation-only for operating partners) | Overcoming barriers: how operating partners unlock and deliver digital transformations swiftly**

*This breakfast deep dive discussion designed solely for operating partners will allow you to join an interactive discussion with designated facilitators.*

**8:30-9:10 AM Breakfast deep dive discussion 5 (invitation-only for operating partners) | An inside look into the future of operating partner models and team structures**

*This breakfast deep dive discussion designed solely for operating partners will allow you to join an interactive discussion with designated facilitators.*

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**9:15 AM Chairman's welcome**

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**9:20-10:00 AM The rise of the operating partner in PE: what does the future hold?**

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**10:00-10:40 AM LP views of the operating partner and value creation in private equity**

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



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**10:40 AM Networking break**

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**11:00-11:40 AM Perspectives on the modern CEO: what great looks like through the eyes of the operating partner**

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**11:40-12:20 PM Investment partner perspectives: dos and don'ts for operating partners**

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**12:20 PM Break**

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### **INTERACTIVE WORKING GROUPS SERIES 3**

**12:30-1:10 PM Interactive Working Group 11 (for operating partners only) | Management team performance and assessments across the investment lifecycle**

*This session designed solely for operating partners will allow the audience to join an interactive discussion with designated facilitators.*

**12:30-1:10 PM Interactive Working Group 12 (for operating partners only) | The power of data science to accelerate value across the lifecycle**

*This session designed solely for operating partners will allow the audience to join an interactive discussion with designated facilitators.*

**12:30-1:10 PM Interactive Working Group 13 (for operating partners only) | Leveraging AI as a key component of your commercial strategy**

*This session designed solely for operating partners will allow the audience to join an interactive discussion with designated facilitators.*

**12:30-1:10 PM Interactive Working Group 14 (for operating partners only) | How operating partners collaborate across functions to deliver the VCP: sharing what's real and actionable**

*This session designed solely for operating partners will allow the audience to join an interactive discussion with designated facilitators.*

**12:30-1:10 PM Interactive Working Group 15 (for operating partners only) | Mastering your role as an operating partner on boards**

*This session designed solely for operating partners will allow the audience to join an interactive discussion with designated facilitators.*

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**1:10-2:10 PM Networking Lunch**



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## **FUNCTIONAL LUNCH SERIES 2**

### **1:10-2:10 PM Functional lunch discussion 3 (invitation-only for operating partners) | The future of cybersecurity: playbooks to enhance and protect in the AI era**

*This closed-door deep dive lunch discussion designed solely for operating partners will focus on strategic areas to enhance value.*

### **1:10-2:10 PM Functional lunch discussion 4 (invitation-only for operating partners) | The modern CRO: skills and traits of commercial leaders to unlock value**

*This closed-door deep dive lunch discussion designed solely for operating partners will focus on strategic areas to enhance value.*

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### **1:10-2:10 PM Women in PE value creation lunch (invitation-only for operating partners)**

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

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### **2:10-2:30 PM PEI presents the 2nd annual operating partners compensation survey results**

*Discover the latest figures in operating partner compensation for 2025 across functional areas, models, AUM, seniority levels, and more.*

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### **2:30 PM Closing remarks and end of conference**