

Private Equity
International

Operating Partners Forum New York 2023

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



*The PEI Operating Partners Forum
is the only academy that exists for
Operating Partners.*

Aaron Miller
Head of Apollo Portfolio Performance
Solutions
Apollo Global Management

The largest global event for private equity value creation



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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

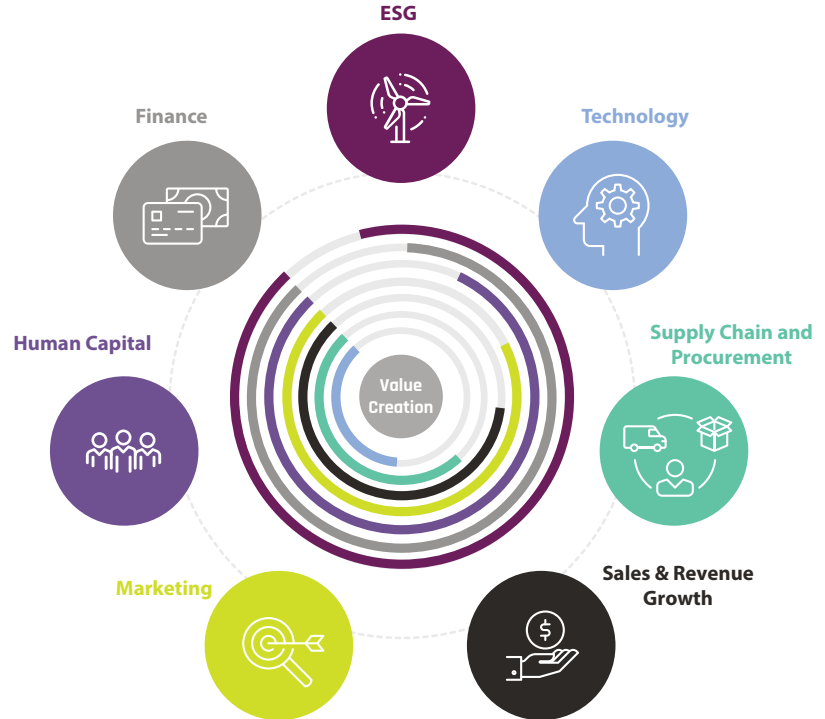
Managing Director,
Portfolio Support
Berkshire Partners

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



Rachel Spasser

Managing Director, Head,
Accel-KKR Consulting Group
Accel-KKR



Karina Sobieski

Co-Head, Portfolio Human
Capital Practice
Advent International



Vikram Mahidhar

Data & Digital Transformation
Operating Partner
**Apollo Global
Management**



Mauricio Sanchez

Managing Director,
Portfolio Office of the CFO
Audax Private Equity



Rich Adduci

Operating Executive
Berkshire Partners



Angelique Slagle

Managing Director, Head of
GTM, Sales and Networks
Blackstone



Sebastien Bilodeau

President, Cerberus
Technology Solutions
**Cerberus Capital
Management**



Dan Glaser

Operating Partner
**Clayton Dubilier
& Rice**



Bob Isaman

Chief Operating Partner
Graham Partners



Jana Wayne

Head of Procurement
Hunter Point Capital

Meet the speakers

[View all speakers](#) ➔



Amar Ghai
Head of Digital Value
Creation (Americas)
KKR



Jill Wight
Managing Director,
Operating Partner
**Morgan Stanley
Capital Partners**



Omar Alismail
Head of Mubadala
Performance Partners
Mubadala



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



Alessandro Moretti
Head of Operational Value
Creation
Public Investment Fund



Kate Migliaro
Global Head of Portfolio
Talent
**Searchlight Capital
Partners**



Jessica Castillo
Operating Partner
Sovereign's Capital



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



Chris Ahearn
Operating Partner,
Commercial
The Sterling Group



Benny Melumad
Managing Director, Digital
Strategy and Innovation
Warburg Pincus

Networking opportunities

Advance your potential in sessions designed to foster connectivity and learning

Learn more ➔



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	» Barings	» Davidson Kempner	» Harvest Partners
» Accel-KKR	» BayPine	» EQT Partners	» HCI Equity Partners
» ACON Investments	» BCI	» Erie Street Growth Partners	» Hg Capital
» Adair & Co	» Beckway	» Ethos Capital	» HIG Capital
» Advent International	» Berkshire Partners	» Evergreen Coast Capital	» Hudson Advisors
» AEA Investors	» Blackstone	» Falco Global Partners	» Hunter Point Capital
» AGF Latin America	» Blue Wolf Capital Partners	» Frazier Healthcare Partners	» ICV Capital Partners
» Alpine Investors	» Brookfield Asset Management	» Frontenac	» IFM Investors
» American Industrial Partners	» BV Investment Partners	» FTV Capital	» Incline Equity Partners
» American Securities	» Camber Partners	» General Atlantic	» Insight Partners
» Apollo Global Management	» Centerbridge Partners	» Georgian	» JF Lehman
» Ara Partners	» Cerberus Capital Management	» GI Partners	» JMI Equity
» Arsenal Capital Partners	» Charlesbank Capital	» Goldman Sachs Asset Management	» Kelso & Company
» Astar Capital	» Clayton Dubilier & Rice	» Graham Partners	» KKR
» Audax Private Equity	» Clearlake Capital Group	» Grain Management	» KPS Capital
» B Capital	» Corsair Capital	» GrowthCurve Capital	» L Catterton
» Bain Capital	» Court Square Capital Management	» GTCR	» Lateral Investment Management
			» Level Equity

Join the largest global community of private equity value creators

Confirmed attendees include:

- | | | | |
|------------------------------|----------------------------------|------------------------------------|-----------------------------------|
| » Lightyear Capital | » One Rock Capital Partners | » Roark Capital | » TPG |
| » Littlejohn & Co. | » Onex | » Rotunda Capital Partners | » TVV Capital |
| » LKCM Headwater Investments | » Ontario Teachers' Pension Plan | » Searchlight Capital Partners | » Udata Partners |
| » LLR Partners | » Opengate Capital | » Shamrock Capital Advisors | » Valpak |
| » LoneTree Capital | » ORIX Capital Partners | » ShawKwei & Partners | » Vance Street Capital |
| » Macquarie | » Paine Schwartz Partners | » Silversmith Capital Partners | » Värde Partners |
| » Middleground Capital | » Pamlico Capital | » Siris Capital Group | » Virgo Investment Group |
| » Morgan Stanley | » ParkerGale | » Sovereign's Capital | » Vision Ridge Partners |
| » MorganFranklin Consulting | » Parthenon Capital | » Spring Lane Capital | » Wafra |
| » Mubadala | » Partners Group | » Stone Point Capital | » Warburg Pincus |
| » New Mountain Capital | » Peloton Capital Management | » Strattam Capital | » Waud Capital Partners |
| » Newlight Partners | » Periscope Equity | » Summit Park | » Wellspring Capital |
| » New State Capital Partners | » Permira | » Terminus Capital Partners | » Welsh, Carson, Anderson & Stowe |
| » NextGen Growth Partners | » Platinum Equity | » The CapStreet Group | » Worklyn Partners |
| » Novacap | » Polaris Growth Fund | » The Carlyle Group | » Zenyth Partners |
| » NuView Analytics | » Providence Equity | » The Raine Group | » And more... |
| » Oak Hill Capital | » Public Investment Fund | » The Sterling Group | |
| » OMERS Private Equity | » Riverside Company | » Thompson Street Capital Partners | |

Event tickets

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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