

Operating Partners Human Capital Forum New York

Preliminary agenda

Pre-conference events - Monday, March 24, 2025 **Tavern on the Green, 67th Street & Central Park West**

5:30 - 7:15 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.

7:15 - 9:00 PM Operating Partners Human Capital Forum Welcome 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 Tuesday, March 25, 2025

7:30 AM Registration and breakfast

THINK TANKS SERIES I

7:50 AM Human capital operating partners think tanks (for operating partners only)

Led by your peers, this closed-door discussion will allow you to learn and share best practices of successful human capital and talent operating partners. Please select one of the two rooms:

Think Tank Room 1

HR operations for operating partners

Think Tank Room 2

Executive/C-Suite talent strategy for operating partners



BREAKFAST DEEP DIVES SERIES I

8:30 AM Human capital deep dive breakfast discussion 1 (for operating partners only): New approaches to organizational design and transformation: sharing playbooks

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

8:30 AM Human capital deep dive breakfast discussion 2 (for operating partners only): Comparing workforce analytics: what are the leading human capital indicators of performance?

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

9:15 AM PEI's welcome and chairman's opening remarks

9:30 AM State of the industry: impact of the macro climate on the talent function in PE

10:10 AM CEO perspectives: the future of talent and working with PE

10:50 AM Networking coffee break

11:20 AM Interactive main room: AI's impact on the function – sharing use cases and implementations for human capital specialists

12:00 PM PE talent partner presentation: key insights for success

INTERACTIVE WORKING GROUPS SERIES I

12:10 PM Interactive Working Group 1 (for operating partners only) – Accelerating change management as a driving force in human capital value creation

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

12:10 PM Interactive Working Group 2 (for operating partners only) – An inside look into market dynamics: employee benefits program optimization and cost savings

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



12:10 PM Interactive Working Group 3 (for operating partners only) – The keys to recruiting commercial leaders to unlock VCP opportunities

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

12:50 PM Networking lunch

12:50 PM Lunch deep dive discussion 1 (invitation-only for operating partners): State of DE&I in the value creation agenda

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

BREAKOUTS I

1:50 PM Track 1 Leveraging human capital value creation initiatives to maximize exit value

1:50 PM Track 2 The evolution of board composition and board performance management

BREAKOUTS II

2:30 PM Track 3 Operating partner-CHRO partnerships for transformation

2:30 PM Track 4 CEO performance management: comparing approaches and how to set them up for success

3:10 PM Networking coffee break

BREAKOUTS III

3:30 PM Track 5 An inside look into CFO recruitment, assessments, and incentives

3:30 PM Track 6 Driving long-term incentives and broad-based employee ownership across the organization

BREAKOUTS IV

4:10 PM Track 7 Progressive approaches to hiring impactful tech talent at your companies

4:10 PM Track 8 Human capital due diligence done right: setting the groundwork for success

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

INTERACTIVE WORKING GROUPS SERIES II

5:00 PM Interactive Working Group 4 (for operating partners only) – Managing executive leadership reviews: operating partners share tactical guidance

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

5:00 PM Interactive Working Group 5 (for operating partners only) – Strategic talent acquisition and selection in the current marketplace

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

5:00 PM Interactive Working Group 6 (for operating partners only) – Compensation and incentive trends: benchmarking and comparing strategies

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

5:40 PM End of day 1 and networking cocktail reception

Day 2 Wednesday, March 26, 2025

7:30 AM Registration and breakfast

THINK TANKS SERIES II

7:50 AM Think tanks for full-time operating partners: talent value creation war rooms (for operating partners only)

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

Think Tank Room 1

Working with third parties: comparing notes on resources and tools

Think Tank Room 2

Training for new and emerging talent specialists (1-2 years in PE)

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



Think Tank Room 3

Comparing human capital value creation across different sectors in PE

BREAKFAST DEEP DIVES SERIES II

8:40 AM Human capital deep dive breakfast discussion 3 (for operating partners only): New and improved talent playbooks for the first 100 days

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

8:40 AM Human capital deep dive breakfast discussion 4 (for operating partners only): Leadership development and coaching in times of disruption: unique guidelines for PE firms

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

8:40 AM Human capital deep dive breakfast discussion 5 (for operating partners only): Understanding the impact of culture at your portfolio companies

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

9:25 AM Chairman's welcome

9:30 AM Redefining your role as a human capital operating partner: showcasing value

10:10 AM Heads of value creation insights: comparing and building human capital operating partner models

10:50 AM Networking break

11:10 AM Working with founder-led company CEOs: the keys to alignment and success

INTERACTIVE WORKING GROUPS SERIES III

11:50 AM Interactive Working Group 7 (for operating partners only) – Steps to maximize human capital value creation across key phases of the lifecycle

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



11:50 AM Interactive Working Group 8 (for operating partners only) – Employee ownership: how are you thinking about it?

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

11:50 AM Interactive Working Group 9 (for operating partners only) – Succession planning and development of future stars

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

12:30 PM Women in human capital value creation lunch (invitation-only for operating partners)

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

- Sharing challenges, tips, and strategies for your career paths as women in value creation
 - Building credibility and trust with the deal teams, management teams, and your value creation teams - what are some ways you've found success in doing that?
 - What are some of the strengths women have that make you uniquely positioned to excel in this space? What are some of the challenges we should be mindful of and how have you tackled these obstacles?
 - What are key initiatives tied to women's leadership at your portfolio companies?
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BREAKOUTS V

1:30 PM Track 9 Innovation in talent value creation: showcasing cutting-edge initiatives across your portfolio

1:30 PM Track 10 Building a high performing executive team that aligns with the VCP

2:10 PM The future of work and the talent function: roles and responsibilities, tech's impact, and what comes next?

2:50 PM Chairman's closing remarks and end of conference