

# Operating Partners Human Capital Forum New York

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Hear firsthand how top PE firms are  
growing their talent functions



Cement your place as an  
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# Operating Partners Human Capital Forum New York

## 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 networking-style dinner designed exclusively for all human capital operating partners attending the Forum.*

### **Day 1 Tuesday, March 25, 2025**

#### **7:30 AM Registration and breakfast**

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#### **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 rooms:*

#### **Think Tank 1 HR operations for operating partners**

##### **Facilitator:**

**Elizabeth Blake**, Operations Vice President, Human Capital, Trive Capital

#### **Think Tank 2 Executive/C-Suite talent strategy for operating partners**

##### **Facilitator:**

**Kristin Brown Patrick**, Senior Operating Partner, Human Capital, New State Capital Partners

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



## Think Tank 3 Training for new and emerging talent specialists (1-2 years in PE)

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### **BREAKFAST DEEP DIVES SERIES I**

#### **8:30 AM Human capital deep dive breakfast discussion 1 (for operating partners only): New approaches to organization design and transformation: sharing playbooks from real-world companies**

*This interactive deep dive will provide a platform for an engaging discussion. Together, we will explore collaborative, data-driven approaches to align your operating model and organizational design with growth objectives in real-world portfolio companies.*

- Strategy alignment: discover why aligning the board and management team with your growth strategy is critical and how this alignment defines the future operating model required to scale and grow the company
- Navigate organizational design challenges: learn how to effectively scale through acquisitions while proactively addressing common integration pitfalls in designing your future organization
- Engage management and the board: identify the essential leadership roles and contributions from your management team and understand when and how to involve the board for alignment
- Understand types of transformation: differentiate between operating model transformations, organizational redesigns, and restructuring efforts. Are you changing the organizing logic or refining existing structures and roles? Are you positioning the company for growth or cost reductions?
- Change management fundamentals: explore strategies for embedding change management from the outset by involving your team in collaborative design processes and addressing challenges to change proactively
- Real-world examples: analyze case studies of organizational changes that succeeded and those that faced challenges. What are the key risks/obstacles during implementation?

#### **8:30 AM Human capital deep dive breakfast discussion 2 (for operating partners only): Leveraging broad-based employee ownership across the organization**

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

- How do you go about setting up employee ownership? How do you get your executives and the board to be aligned on LTI implementations?
- How are you incentivizing your employees with it? What is the perceived value of it and how do you ensure the value of it is understood?
- Comparing different shared ownership programs across portfolio companies
- How effective has it been from a recruitment and retention point of view? How effective has it been to drive operational improvements?
- Showcasing its effectiveness in building a culture of ownership that aligns with the interests of investors

- What does the future of shared ownership and its scope look like for PE firms and portcos?
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### 9:15 AM PEI's welcome and chairman's opening remarks

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### 9:30 AM Strategic human capital: maximizing value creation for long-hold exits

Discover actionable strategies to turn human capital into a competitive advantage, ensuring portfolio companies thrive in the long haul and achieve premium valuations at exit. Key discussion points include:

- Building leadership pipelines to sustain performance during long hold periods
- Aligning HR operations with strategic growth initiatives to maximize ROI
- Enhancing organizational culture to attract and retain top talent
- Leveraging people analytics to inform critical decision-making
- Preparing HR functions for seamless transitions during the exit phase

#### Moderator:

**Laura Queen**, Founder and CEO, 29Bison

#### Panelists:

**Faye McDermid**, Vice President, Private Equity, Business Operations, Brookfield Asset Management  
**Chris Trendler**, Managing Director, Head of Portfolio Talent, Madison Dearborn Partners

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### 10:10 AM AI's impact on the function – use cases and implementations for human capital specialists

- Sharing practical use cases: how are you using it? What should talent operating partners be using and doing now for impact? How do you best use data with AI?
- How will AI change the talent function in PE? What is innovative from an AI perspective in talent?
- How are you looking at AI across job functions and its use within companies: how will workforces be impacted by it in future? What is the primary goal of generative AI for HR processes?
- Leveraging and comparing AI tools and platforms for recruiting, selection, and assessments
- What are your main concerns of using AI in recruitment and assessments?

#### Panelists:

**Angela Geffre**, Head of Human Capital, GrowthCurve Capital

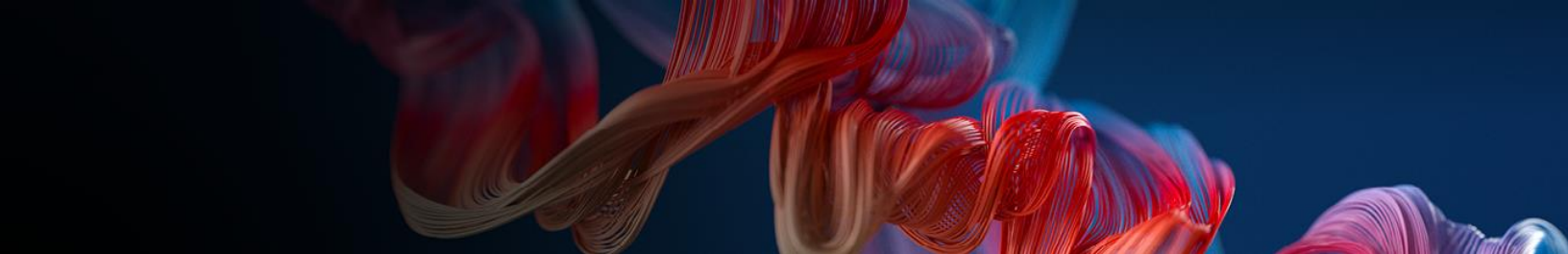
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### 10:50 AM Networking coffee break

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### 11:20 AM CEO perspectives: the future of talent and driving value creation in PE

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- What do CEOs want from their PE sponsors and vice versa: what do CEOs like and dislike?
  - What do CEOs think is most important in the talent value creation plan across the lifecycle?
  - What questions should operating partners and deal partners be asking during diligence to understand what is really happening in the organization?
  - What can human capital operating partners do better to assist you? Where do CEOs need the most help and least help? What are CEO expectations for a productive relationship?
  - What are the biggest talent related challenges according to CEOs?
  - Through the lens of the CEO, what are some common operating partner dos and don'ts?
  - How can CEOs be a bridge between the talent partner and the investment partner

**Moderator:**

**Dan Hawkins**, Founder and CEO, Summit Leadership Partners

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## **INTERACTIVE WORKING GROUPS SERIES I**

### **12:00 PM Interactive Working Group 1 (for operating partners only) – Succession planning and development for the future**

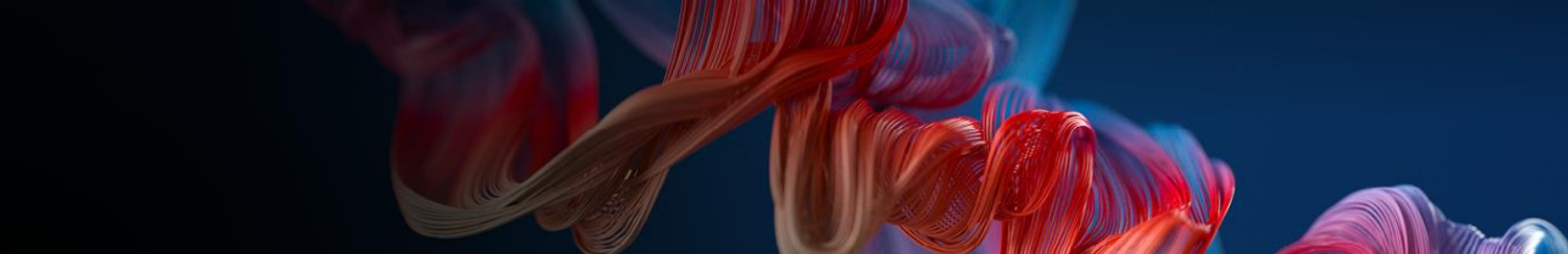
*This session designed solely for operating partners will allow the audience to join an interactive discussion with designated facilitators.*

- How do you go about planning for succession and transitions? How is succession planning for CEOs and new leaders changing and evolving?
- How are longer hold periods affecting the process? What do effective models look like for new leader assimilation?
- With a growing number of experienced executives retiring, have you been confronted with more succession-related situations?
- How are you finding and unlocking top talent/leaders for the future? What innovative approaches have you seen at companies that are governed with an eye to the future?
- Accelerating leadership engines internally from below the C-suite: looking at maturation of people as an added value lever
- How can your current leaders empower top talent at all levels to maximize impact? How much guidance do you give to your CEOs on the topic of future talent?
- Is your top talent truly building your future, or are you controlling the strategy and them?

### **12:00 PM Interactive Working Group 2 (for operating partners only) – Navigating talent challenges in the crucial post-close period**

*The first 100 days after a deal closes can make or break value creation plans (VCPs). This interactive session, designed exclusively for operating partners, dives into the pressing questions that define success in this critical period:*

- Unveiling common challenges: what are the top talent-related hurdles operating partners face immediately post-close, and why are these so pivotal to long-term success?
- Aligning on the right priorities: how can you quickly determine if leadership teams, and key players have the skills and alignment needed to meet aggressive VCP timelines?

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- Avoiding early missteps: what actions derail leadership and team cohesion early on, and how can you pre-empt blind spots that often undermine team effectiveness?
  - Breaking down roadblocks fast: what challenges arise in assessing leaders, building trust through coaching, and creating high-performing teams, and how do you overcome them?

**Facilitator:**

**Sandy Fiaschetti**, Founder and Managing Partner, Lodestone People Consulting

**12:00 PM Interactive Working Group 3 (for operating partners only) – Strategic talent selection and acquisition in the current marketplace**

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

- How do you tactically get involved in search? How deep into the organization are you involved in recruitment?
- What are the biggest challenges in recruiting talent in the current market?
- Are you hiring recruiters? How do you select search partners? How have playbooks evolved in looking at resourcing and perfecting search practices?
- What key tools/technologies are you using to facilitate referencing and candidate tracking?
- How are you leveraging fractional and interim talent in the process?
- Executive network management: how do you build, foster, and engage your network
- Interview and selection: what key traits are you looking for in selecting the right talent for your portcos? Are you utilizing scorecards?
- Can you share some key mistakes you experienced that you would not repeat?

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**12:40 PM Networking lunch**

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**12:40 PM Lunch deep dive discussion (invitation-only for operating partners): An inside look into market dynamics: employee benefits program optimization**

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

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**BREAKOUTS I**

**1:40 PM Track 1 Human capital transformations: showcasing real world implementations that move the needle**

- What are the most unique and actionable initiatives you have implemented? How did you go about building these out?
- How did these initiatives make a difference? Were any of these outcomes surprising?
- What were the challenges you had to overcome/barriers you had to break down in carrying out your plan?

- Were you able to consolidate and replicate this success across companies in the portfolio?

**Moderator:**

**Ruthanne Roth**, Founder and CEO, Aster Talent

**Panelists:**

**Kristin Schroeder**, Operating Partner, Talent, Welsh, Carson, Anderson & Stowe

**Karina Sobieski**, Managing Director, Human Capital, Clearlake Capital Group

**1:40 PM Track 2 Operating partner-CHRO partnerships for transformation**

- What does a great CHRO look like? What are the new capabilities of the modern CHRO?
- How do you engage your CHROs: how do you enable best practice sharing across the CHROs in your portfolio? How do you coach CHROs to become strategic partners?
- How do CHROs and talent partners align to address HR issues and transformations?
- What are the biggest pain points for CHROs?
- What are the challenges for human capital operating partners working with CHROs?
- How can operating partners provide support in working with PE across the lifecycle? How do you enable a data-driven foundation of metrics with CHROs to drive strategic decisions?

**Panelists:**

**Cara Nealon**, Senior Vice President, North America PE Talent, Portfolio Group, Bain Capital

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**BREAKOUTS II**

**2:20 PM Track 3 Optimizing performance management across the lifecycle**

- Comparing operating partner playbooks in performance management
- How are you tracking if the talent at your portcos is making progress? How do you know when you are on the right track in moving towards progress?
- What are the key factors leading to underperformance? What is your non success rate?
- How do you establish realistic goals? How are you measuring success along the way?
- How do you capture underperformance earlier in the process? How are you overcoming underperformance? What key measures do you take to address underperformance?
- Uncovering the correlation between what is found in assessments and what then happens in performance

**Panelists:**

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

**Jamie Jacobs**, Chief Talent Officer, Oak Hill Capital

**Katie Mackin**, Vice President, Portfolio Talent, GS Value Accelerator, Goldman Sachs

**2:20 PM Track 4 Human capital due diligence done right: setting the groundwork for success**

- Understanding what human capital due diligence really is and how it impacts the VCP
- What does your due diligence scorecard to assess talent at a company look like? What data do you gather?

- How do you work with deal teams on talent due diligence? How do you influence the deal process?
  - Have your playbooks changed/evolved when it comes to due diligence?
  - What are the biggest challenges associated with due diligence and how do you de-risk human capital?
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### **3:00 PM Networking coffee break**

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#### **BREAKOUTS III**

#### **3:20 PM Track 5 An inside look into CFO recruitment, assessments, and incentives**

- The modern CFO: uncovering the right traits for current times
- What makes a good CFO candidate? What makes a CFO successful in working with PE and driving the VCP?
- How are you recruiting, assessing, and developing CFOs? What are the biggest challenges in recruiting and selecting the right CFO today?
- What are you doing to retain and incentivize CFOs in the current market? How have longer hold periods affected this?
- Why do CFOs look for new opportunities? How do hybrid/remote options come into play?

#### **Panelists:**

**John Knapp**, Operating Director, Talent, Berkshire Partners

#### **3:20 PM Track 6 The ROI of senior team alignment, optimization, and effectiveness**

- What does a high performing management team look like?
  - Keeping C-levels aligned and performing in the right direction as a team in a fast-paced PE environment
  - Executive team alignment: building trust and purpose; establishing alignment of purpose
  - Uncovering the ideal composition of executives: unlocking complementary skills, experiences, technical aspects, and personality traits in the C suite
  - Focusing on team mechanics and creating a shared language to drive the VCP
  - How do you identify and understand when you need a new executive team member?
  - What are the barriers for executives to achieve alignment inside the organization? How do you support them in this? What do you do when trust is broken?
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#### **4:00 PM Uncovering the latest playbooks in executive assessments**

- Leadership assessment methodologies: what are the latest innovations and perspectives in assessment?
- Pinpointing/grasping what makes a successful portfolio executive: what are the traits that make them successful? What do you look for to evaluate whether the CEO and the management team can scale? How do you identify themes of non-success early on?



- Comparing scorecards and predictive analytics to unlock common traits and patterns that lead to success
- Sharing risk factors based on whether the executive has or has not worked with PE before
- Establishing clear expectations/goals of what is needed from management teams across the hold period
- Creating alignment on the VCP: aligning your expectations to the management team's expectations
- How do you understand when you need to replace an executive member?
- How do you assess management teams while building and maintaining relationships?

**Panelists:**

**Conor Leamy**, Chief Talent Officer, Shore Capital Partners

**Ali Walker**, Partner, Chief Talent Officer, FTV Capital

## **INTERACTIVE WORKING GROUPS SERIES II**

### **4:50 PM Interactive Working Group 4 (for operating partners only) – Managing CEO annual reviews: operating partners share tactical guidance**

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

- How do you do go about annual CEO evaluations? What does the review process look like?
- What scorecards are you using for it? What do you focus on most?
- What works best in your annual CEO review process and what does not?
- What are key indicators of CEO performance improvement? How do you differentiate company performance vs. CEO performance?
- How are you putting these reviews into action?
- How do you guide your boards through it?

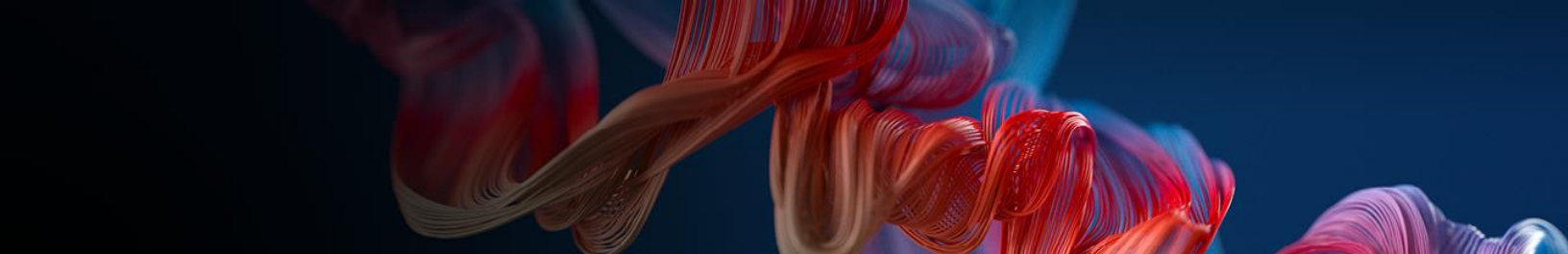
### **4:50 PM Interactive Working Group 5 (for operating partners only) – Accelerating change management as a driving force in human capital value creation**

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

- How have your change management processes evolved and accelerated over the last couple of years?
- How do you build change in a 3-5 year period across culture, tech, integrations, and upscaling the C-suite? How do you build it without breaking it?
- What are the dos and don'ts in driving change in looking at communication with the company being acquired, advising C levels and meeting HR teams?
- Can you share specific examples of systems and infrastructure implementations that were rolled out to scale faster?

### **4:50 PM Interactive Working Group 6 (for operating partners only) – Executive compensation and incentive trends: benchmarking and comparing strategies**

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

- How do you best deal with executive compensation, negotiations, and requests?
- What types of equity/compensation packages are your executives asking for? When do you give equity and when do you not?
- How effectively are you doing comp benchmarking? What are the latest and most creative compensation packages you are seeing?
- How are you motivating and incentivizing leaders to retain them in this environment? Do you compensate based on impact?
- Inflationary and economic pressures on compensation – how do you get the best talent in this market while staying within budget?
- What do you expect future trends in management team compensation to look like?
- What are key differences and similarities in looking at comp models across sectors and sizes of companies?

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**5:30 PM End of day 1 and networking cocktail reception**

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## **Day 2 Wednesday, March 26, 2025**

**7:30 AM Registration and breakfast**

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### **THINK TANKS SERIES II**

**8:00 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 1 Working with third parties: comparing notes on resources and tools**

**Think Tank 2 Unlocking value creation through new hire success**

**Facilitators:**

**David Cohen**, Partner, Human Capital, Kelso & Company

**Nicole Weil**, Manager, Operational Effectiveness, Kelso & Company

**Think Tank 3 Executive team alignment and purpose**

**Facilitator:**

**Maggie van de Griend**, Managing Director, Portfolio Talent, Warburg Pincus

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## **BREAKFAST DEEP DIVES SERIES II**

### **8:45 AM Human capital deep dive breakfast discussion 3 (for operating partners only): Taking a deeper dive into organizations: tactical implementations beyond/below the C-suite**

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

- Uncovering success stories in implementations below the C-suite
- What are the biggest challenges and opportunities that can be unlocked by getting involved in the deeper levels of companies?
- What are you doing when it comes to performance management deeper in the organization?
- Broader workforce evaluations: what strategies, metrics, and tools do you use to assess and manage talent below the C-suite?
- What does good governance look like across the lower levels of organizations?
- Dos and don'ts post deal: what particular people dynamics do you pay attention to?
- Talent retention: what are the biggest challenges in retaining talent and how have remote/hybrid work models come into play?

### **8:45 AM Human capital deep dive breakfast discussion 4 (for operating partners only): Leadership coaching and development: 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.*

- Building leadership coaching and development programs for PE portco executives
- How would you define successful leadership? What are key qualities of the most impactful leaders at your companies?
- As a talent partner, how can and how do you best serve as a coach across the lifecycle?
- What is the level of coaching needed? What do you focus on most in current times? What are the biggest challenges associated with coaching?
- What is the ROI of coaching and leadership effectiveness? How does it accelerate the VCP?
- What are key differences and similarities in working with different leaders across sectors?

#### **Facilitators:**

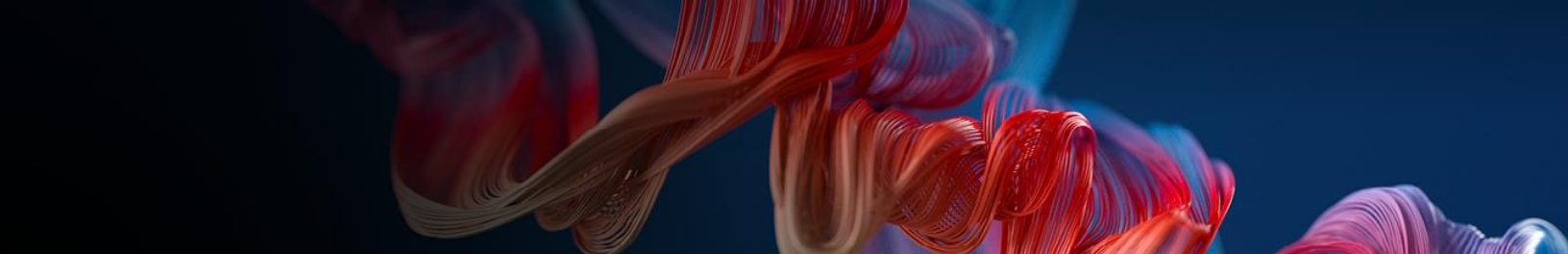
**Ted Bililies**, Partner and Managing Director, AlixPartners

**Jason McDannold**, Americas Co-Lead, Private Equity Partner and Managing Director, AlixPartners

### **8:45 AM Human capital deep dive breakfast discussion 5 (for operating partners only): Leveraging tech, data, and workforce analytics for the human capital function**

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

- How are talent teams truly moving the needle with tech? Where does tech and data science provide the most and least value and what does the future hold?
- What metrics are you using throughout the different phases of the investment lifecycle?
- How do you get objective data? How do you develop KPIs? How are you integrating AI into your data and reporting systems?

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- What tools are you using when it comes to automating talent processes?
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### 9:25 AM Chairman's welcome

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### 9:30 AM Heads of value creation insights: comparing and building human capital operating partner models

- How important is the talent function in your overall value creation playbook? How do you define the mandate of a human capital operating partner?
  - Comparing team models: what makes a great talent partner/function?
  - How are you looking to build and potentially expand the talent function now and in future?
  - How is your value creation team setup? What do you look for in an operating partner that adds value to the team? How are you finding/selecting the right operating partner talent?
  - How do other operating partners work best with talent partners on your team?
  - What are the biggest talent related pain points at your portcos? What are the biggest talent related success stories you can share?
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### 10:10 AM Defining your role as a human capital operating partner: driving impact and value

- Understand how to communicate and drive value with both the leaders of your firm and the portfolio companies
- How are you interacting with investment partners? What are the biggest challenges and opportunities in engaging with deal teams?
- How are you impacting your companies with a closer level of engagement and a deeper and more programmatic level of support?
- How do you showcase your value as a talent partner? How do you quantify the success and ROI of your function?
- How is the role of the human capital operating partner evolving? What does great look like?
- How do you manage the needs of the portcos with those of your PE colleagues?
- How do you structure and build a function that is fit for purpose for your firm?
- How are you working with other functions to be an integral part of the value creation team?

#### Panelists:

**Kelly Carlson**, Managing Director, Head of Talent, STG Partners

**Steven Maxwell**, Senior Vice President, Portfolio Human Capital, Audax Private Equity

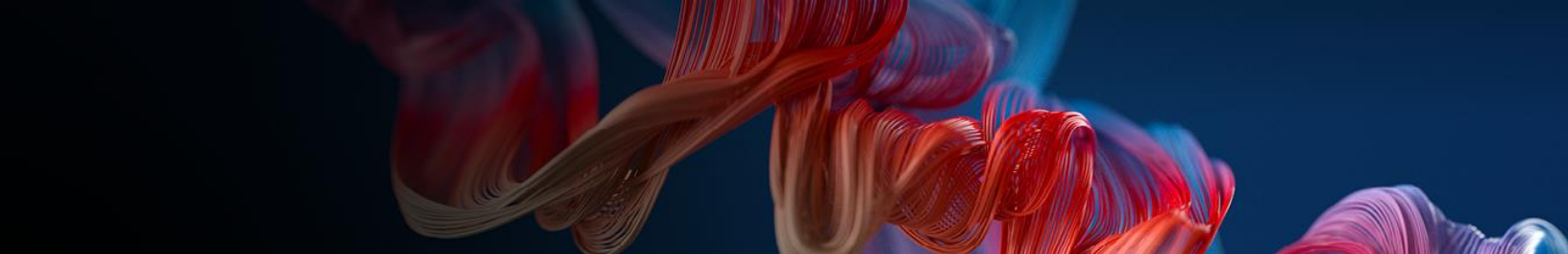
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### 10:50 AM Networking break

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

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- Uncovering and assessing the strengths and weaknesses that set founders apart in working with PE
  - How do you best leverage founder strengths to drive and accelerate the VCP? What does your engagement and support model look like?
  - How are the challenges and playbooks different in working with founder led companies?
  - How do you best manage cultural and operational transitions at founder led companies?
  - How do you deal with pushback and founder CEO blind spots to ensure alignment?

**Panelists:**

**Emily Azevedo**, Partner and Head of Talent, Mainsail Partners

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**11:50 AM PE talent partner presentation: key tips for success**

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**INTERACTIVE WORKING GROUPS SERIES III**

**12:00 PM Interactive Working Group 7 (for operating partners only) – Harnessing culture as a driving force for value creation**

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

- How do you ensure the portco culture is not negatively impacted by the PE firm?
- What are some key tactics in your playbook to understand, define, evolve and strengthen the culture at your portcos?
- How are you assessing culture during the due diligence and post-deal phase? What are imminent action items needed in the post-deal phase
- What methods and culture diagnostic tools are you using?
- How are you leveraging the management team to positively impact culture?
- Sharing examples of how culture has an immediate and direct impact on the VCP

**12:00 PM Interactive Working Group 8 (for operating partners only) – The keys to recruiting commercial leaders to unlock growth**

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

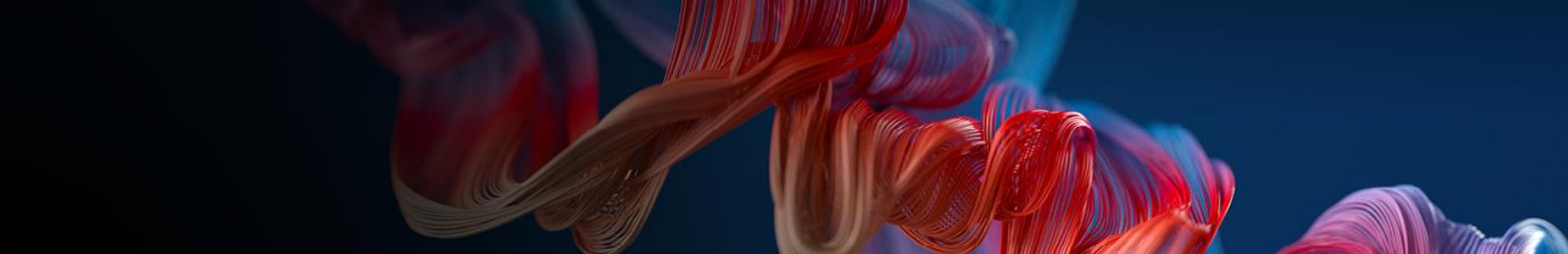
- Recruiting CROs: how are you finding commercial talent? What are the challenges of recruiting commercial talent in the current marketplace?
- What makes a great commercial leader? How do you identify the right profiles and traits for PE to deliver revenue growth and accelerate value creation?
- What newly created commercial roles are you seeing at your companies?

**Facilitator:**

**Kate Griffin**, Director, Portfolio Talent, Bain Capital

**12:00 PM Interactive Working Group 9 (for operating partners only) – Dissecting labor costs and its impact on your investment thesis**

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



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

- As you look at team scores, when should you pay up more for talent vs. not
- What are the latest trends in looking at labor cost data?
- Understand best practices in labor cost management for your companies
- Uncover labor cost management related to org structures, dynamics, and deployment
- Sharing success stories about its impact on profitability

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## **12:40 PM Networking lunch**

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### **12:40 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 IV**

### **1:40 PM Track 7 The evolution of board composition and board performance management**

- How have boards evolved in looking at composition, diversity of profiles, voting rights, and areas of focus?
- Understanding effective dynamics related to board members, meetings, and interactions
- How should human capital operating partners prepare for board meetings? How can talent partners best contribute to boards?
- Board effectiveness: what has been successful and what are the different blends that are most and least successful? Has your exec chair program been successful?
- Board performance management: who is in charge of managing board performance management? How are your boards performing?
- How do you evaluate if/when you need a new board member/s?

### **1:40 PM Track 8 Progressive approaches to hiring impactful tech talent at your companies**

- Winning the war for tech talent in today's market: how are you dealing with it?
- Recruiting CTOs: what makes a good tech leader? How do you identify the right profiles for PE to deliver and accelerate digital value creation?
- With the dawn of AI, how are labor force and tech skill set requirements changing? What does the future hold?

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- What newly created tech roles are you seeing at your companies?
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### **2:20 PM State of the industry and the future of the PE talent function**

- What does the future look like in response to the latest developments in the macro environment? How are you managing that now and preparing for it looking forward? What are you seeing already?
  - How is the current fundraising environment shaping PE and the human capital function in PE? How has your talent function evolved in response to this?
  - What will we be seeing over the next 5 years as your roles and playbooks continue to evolve?
  - How are you innovating and de-risking human capital now and with an eye to the future?
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### **3:00 PM Chairman's closing remarks and end of conference**