



Change, Transformation & Organization Design Conference

May 18 – 19, 2023 New York Marriott Downtown New York, NY LEAD SPONSORS







PRE-CONFERENCE WORKSHOP

Overcoming the Tension Points in Your Operating Model

With the economic turbulence facing nearly all industries and organizations, the importance of having an effective operating model has never been greater. The organizations that win have found ways of addressing the tension points that stress every operating model. In this four-hour interactive workshop, participants will learn an easy-to-use, intuitive organization alignment approach and tools for assessing and realigning an organization's operating model. To apply these tools, participants will take a dive deep into the HR Operating Model with that function's respective tension points and potential solutions.

Specifically, this session will:

- Introduce a practical organization design approach with related tools to help executives and practitioners optimize their operating models
- Look at how an effective operating model leads to marketplace success and organizational effectiveness despite economic headwinds
- Case Study: Explore four of the key tension points of HR operating models and discuss possible design solutions

Presenters:

Ken Thompson, CEO/Principal, AlignOrg Solutions
Reed Deshler, Principal Advisor, AlignOrg Solutions
Tony Matejczyk, Principal, AlignOrg Solutions
Rebecca Ellis, Engagement Executive, AlignOrg Solutions
John King, Engagement Executive, AlignOrg Solutions

Pre-Conference Workshop Agenda Wednesday, May 17, 2023(1:00 pm-5:00

pm EST)

12:15 - 1:00 pm Registration

1:00 - 1:10 pm

Introductions and Welcome

1:10 - 1:45 pm

Designing Operating Models for Differentiation

- Learn an easy-to-use framework for organization/operating model design
- Highlight the importance of macro-level design issues that organizations face

1:45 - 2:45 pm

Key Design Tension Points that Executives are Trying to Address

- Understand key operating model tension points and the organization design implications
- Show how these tension points can hold an organization back from achieving optimal performance and/or marketplace success

Introduction and Review of Select Organization Design Tools

Apply select organization alignment tools to address key design questions operating model tension points create (Small group break-outs)

2:45 - 3:00 pm Break

3:00 - 3:30 pm

Introduction and Review of Select Organization Design Tools (cont.)

Apply select organization alignment tools to address key design questions operating model tension points create (Small group break-outs)

3:30 - 4:15 pm

Case Study Application: HR Operating Model Tension Points

- Review key tension points in an HR function's operating model and consider possible solutions
- Allow participants to develop possible solutions to their own operating model tension points

4:15 – 4:45 pm

Leadership Implications for Driving Organization Transformation

- Discuss the role of an Alignment Leader® and how they can be aided by an effective Change Partner
- Introduce the keys to successfully navigating a transformation journey

4:45 – 5:00 pm

Questions & Answers and Wrap-up

We are not accepting registrations from vendors for the Pre-Conference Workshop. Registration received from vendors or anyone in a sales or accounts management role (from any organization) - will be canceled.

CHANGE, TRANSFORMATION AND ORGANIZATION DESIGN

DAY ONE

Thursday, May 18, 2023

Morning Sessions (Plenary)

7:45-8:25 am

Registration and Breakfast

8:25 - 8:35 am

Welcome and Introduction

Dottie Donnelly Brienza, Chief Human Resources Officer, **Cambrex**, Conference Chair

Adrienne D. Sims, PsyD., Chief Human Resources Officer, Indiana University Health, Conference Chair

8:35 - 9:05 am Session A

Reinventing the Team and Customer Experience Faster than the Rate of Change

Shannon Garcia has worked to transform some of the most iconic global brands in hospitality, retail, and restaurants, including Starbucks and Darden Restaurants. Now, as Global Chief Operating & Transformation Officer at Yum! Brands, the home of Taco Bell, Pizza Hut, and KFC among others, she will share why employee experience and customer experience must be reinvented even faster than customers are reinventing themselves and offer strategies for leading these transformations.

Shannon Garcia, Global Chief Operating Officer & Chief Transformation Officer, **Yum! Brands**

9:05 - 9:35 am **Session B**

Transforming for the Future While Maintaining a Historical Legacy

It's never been more important for organizations to be agile and adaptable in the face of so much change. But AB InBev, the world's largest brewer, has taken a different approach: staying true to the core of who they are. As the company made significant shifts to enable growth in recent years, leaders were challenged to evolve areas of the business in support of their new business strategy, including their deeply held and muchloved culture. In this session, hear from Toon Van Der Veer, AB InBev's Global Vice President, People Continuity, and Katie Papazian, Principal at Daggerwing Group, as they discuss how AB InBev is navigating the evolution of their business strategy, purpose, and culture – all while holding on to what has made their company strong for centuries.

Toon Van Der Veer, Global Vice President, People Continuity, AB InBev

Katie Papazian, Principal, Daggerwing Group

9:35 - 10:05am Session C

Fireside Chat: Steve Youngwood, Chief Executive Officer of Sesame Workshop

As CEO and previously as COO of Sesame Workshop, Steve Youngwood has led a dramatic expansion of programming beyond the iconic Sesame Street. Sesame Workshop has forged partnerships with HBO, CNN, and Apple, all while growing ties with PBS, further expanding the brand's presence, and broadening global work to meet the most pressing needs of children and caregivers, including in crisis contexts. Mr. Youngwood will share with us personal and professional inspirations and insights into rewiring mindsets, organizations and business models, while staying true to the Workshop's profoundly important mission.

Steve Youngwood, CEO, Sesame Workshop

Moderator: Michelle Blieberg, Program Director, Leadership Development Council and Member of the Human Capital Advisory Council, **The Conference Board**

10:05 - 10:15 am **Break**

10:15 - 10:45 am Session D

Revolutionizing IT: Transforming the User Experience

Every minute an employee spends struggling with a system is a minute they are not doing the work they were hired to do and the work they are passionate about. IT has a unique responsibility to alleviate that friction and, by doing so, transform the user experience. Fletcher Previn, Cisco SVP & Chief Information Officer, talks about the unique role and responsibility of IT to change organizational culture for the better by continuously improving the employee experience across the enterprise.

Fletcher Previn, SVP & Chief Information Officer, Cisco

10:45 - 11:15 am **Session E**

Creating a Transformative Enterprise with Agility and Adaptability at its Core

Lucet Health has a vitally important mission -- transforming how behavioral health is delivered and administered – and had an urgent challenge: building internal cohesion and collaboration in the newly-merged company. This session will focus on how Gagen MacDonald worked with Lucet CEO Shana Hoffman and her team to bridge the crucial elements of strategy, structure and culture, emerging with an invigorated organization and an agile start-up mindset. Learn how a unique approach pinpointed and unlocked organizational strengths and opportunities to build a truly transformative organization.

Greg Voeller, Senior Director and Team Lead, Gagen MacDonald

Shana Hoffman, CEO, Lucet Health

11:15 am - 11:55 am Session F

Culture Panel: The Reimagined Workplace 2023

Join The Conference Board's popular and compelling discussion on our evolved workplace and its impact on culture. Dr. Robin Erickson from The Conference Board will share current findings regarding the 2023 workplace and the resulting culture changes. Table stakes today demand impactful business and operating model design, aligned organization structures, and state-of-the-art technology. To assure our businesses run effectively, we must nurture a change agile workforce, adopting quickly to new ways of working, with shared values, and reinforcing behaviors while being fully present to our employees. It has never been more important to adopt a human-centric focus by listening to our employees, who reflect multiple generations and significant diversity with divergent life experiences. Gain insights from leaders in varied industries, who are forging new ways of shifting their culture, and retaining their employees, while assuring business impact.

Johann Laville, Chief Learning Officer, Global Learning & Development, **Merck & Co., Inc.**

Kelly Wojda, Vice President, Global Learning & Development, Caterpillar

Robin Erickson, Ph.D., Vice President, Human Capital, The Conference Board

Torrance Ford, Vice President of Talent Management, Shaw Industries

Moderator: Dottie Donnelly Brienza, Chief Human Resources Officer, Cambrex

11:55 am - 12:05 pm Break

12:05 - 12:35 pm Session G

Reinventing the Future of Work at Microsoft

Microsoft is again leading the way, this time, in the future of work. Signals and trends continue to abound giving us a bit of clarity, albeit little certainty, into how the future of work will evolve. Individual expectations have accelerated for flexible work, even in industries that historically could dictate work location and hours. Team-based value generation continues evolving as critically important to organizational success with leaders and managers re-thinking necessary capabilities and work models. The Organization Design and Change imperative today, is to create hyper-fluidity and agility in organizations. Join Karen Kocher's conversation about the future of work including identifying skills needed for effective organizations while reimagining how work gets done.

Karen Kocher, Global General Manager, Future of Work, Workforce of The Future and Talent and Learning Experiences, **Microsoft**

12:35 - 1:05 pm Session H

Leading Multiple Organization Transformations at Once – How to Manage Multiple Key Stakeholders and Drive Transformation Success

Alexander Vaughan-Bonterre, Senior HRBP at PG&E shares his real-life perspective on best supporting the organization design journey end-to-end. Key points include how to keep multiple executive-level designs synchronized, communicated, and cohesive to the overall organization.

Alexander Vaughan-Bonterre, HRBP, Pacific Gas and Electric

Rebecca Ellis, Engagement Executive, AlignOrg Solutions

1:05 – 1:50 pm **Lunch**

1:50 - 2:15 pm

Networking Dessert

The Organization Design Conference agenda continues starting on page 5.
The Change and Transformation Conference agenda continues starting on page 7.

ORGANIZATION DESIGN CONFERENCE

DAY ONE Thursday, May 18, 2023

2:15 - 2:45 pm Session I1

Accelerating Transformation in Global Learning & Development at Merck

Global Learning & Development at Merck & Co., Inc. ensures learning solutions are aligned to support the company's purpose to use the power of leading-edge science to save and improve lives around the world. Merck's Global Learning & Development organization has engaged in an accelerated transformation to ensure those learning solutions are innovative experiences for all learners and that the organization creates operational efficiencies to propel the impact of learning across all audiences. Join Johann Laville as he shares this multidimensional Global Learning & Development transformation at Merck.

Johann Laville, Chief Learning Officer, Global Learning & Development, **Merck & Co., Inc.**

2:50 - 3:20 pm Session J1

Building Broadcom's Organization for Rapid Growth

Broadcom Inc. is a global technology leader that designs, develops, and supplies a broad range of semiconductor and infrastructure software solutions. With our engineering-centered culture and extensive investment in R&D, Broadcom Software is uniquely positioned to help global organizations drive key initiatives that enable scalability, agility, and security. Internally, we often test new methods on ourselves, including organizational alignment, hypothesis-driven business, and agile operating models. In this session, Laureen Knudsen, Chief Transformation Officer of Broadcom Software, will describe these methods as the company continues to evolve.

Laureen Knudson, Chief Transformation Officer, Broadcom Software, Inc.

3:25 - 4:05 pm Session K1

Human Centricity: The Foundation of Organization Design & Development

UnitedHealth Group, a Fortune 500 company, and the nation's largest health insurance provider is a healthcare and well-being company. UnitedHealth Group's mission is to help people live healthier lives while assuring the health system works better for everyone. Learn how the dynamic Organizational Design and Talent Development team leverages Human Centered Design to support 400K colleagues, in two distinct and complementary businesses, to build a modern, health system through improved access, affordability, outcomes, and experiences. Join Kristin Halda, as she shares how her team identifies strategic priorities, develops operating models, and creates organizational

structures built on a foundation of human centricity. Kristin will take a deeper dive into how this approach simplifies complex, enterprise efforts, highlighting UnitedHealth Group's call centers, providers, marketing, employee well-being, and workplace of the future efforts.

Kristin Halda, M.Ed. Sr. Director of Organization Design & Talent Development, **UnitedHealthcare**

4:05 – 4:20 pm **Break**

4:20 - 4:50 pm Plenary Session L

NASA: The Moon to Mars Objectives and the Power of Storytelling

In September 2022, NASA released the Moon to Mars Objectives, a blueprint for shaping exploration throughout the solar system. A comprehensive framework for NASA's exploration strategy, the Objectives focus on the big picture, the "what" and "why" of what NASA should be doing before prescribing the "how."

Learn how stakeholders were heard throughout the process of developing the Objectives, and how the process utilized the power of storytelling to create a reinforcing cycle of awareness, engagement, and unity of purpose during this time of transformation.

Beth DiGiovanni, Senior Advisor for the Future of Work NASA Langley Research Center

4:50 - 5:20 pm Plenary Session M

Fireside Chat: Arthur Gianelli, President, Mount Sinai Morningside and Chief Transformation Officer, Mount Sinai Health System

A discussion of how one of the nation's most esteemed health systems transformed organizational culture and instilled key behaviors to drive improvements in patient experience, including launching a series of learning academies and spreading the utilization of lean process improvement methodologies. We will also explore how these transformative practices helped Mount Sinai Morningside face the enormous challenges of COVID-19.

Arthur Gianelli, President, Mount Sinai Morningside & Chief Transformation Officer, Mount Sinai Health System

Moderator: Robin Erickson, Ph.D., Vice President, Human Capital, The Conference Board

5:20 - 5:30 pm

Day 1 Closing Remarks, Day 2 Preview

Dottie Donnelly Brienza, Chief Human Resources Officer, Cambrex, **Conference Chair**

Adrienne D. Sims, PsyD., Chief Human Resources Officer, Indiana University Health, Conference Chair

5:30 - 6:30 pm

Reception

DAY TWO

Friday, May 19, 2023

8:00 - 8:45 am

Registration and Breakfast

8:00 - 8:45 am

Breakfast Roundtables – Small Group Discussion

#1 Organization Design 2023, leader **Shradha Prakash**, VP, Talent Management & Sr. Talent Partner, **Prudential Financial**

#2 Building an Effective Culture in your Organization, leader **Kelly Wojda**, Vice President, Global Learning & Development, **Caterpillar**

#3 HR Analytics and Their Application to Organization, leader **Doug Shagam**, Head, People Data and Insights, **Johnson & Johnson**

#4 Building Technology Leadership in your Organization Leader, leaders **Torrance Ford**, Vice President of Talent Management, **Shaw Industries**, **Tim Peter**, Program Director, Digital Leadership & Transformation Council and Digital Marketing Strategy Council, **The Conference Board**

#5 Building Mental Wellness and Resiliency, leader **Felicia Bachman Chenault**, Senior Director, Change and Journey Management, Digital Acceleration, **Walmart**

#6 Our Personal Change Stories and How They Shape Us as Leaders, leader **fahad punjwani**, Founder & Facilitator, **Suchee Studios**

#7 Change and the Employee Experience, including Hybrid/Remote Workplaces leader **Matthew Cole**, Organizational Change Manager, **State Farm**

#8 Modernizing Change Management leader Laura Broughton, Principal Designer, Silicon Valley Bank, a Division of First Citizens Bank, and Thaiz Chanman, VP People Experience & Operations, Remitly

8:45 - 8:50 am

Welcome

Adrienne D. Sims, PsyD., Chief Human Resources Officer, Indiana University Health, Conference Chair

8:50 - 9:30 am Session N1

Technology Trends to Achieve Effectiveness and Efficiencies in Organization

When your business goals are to save costs, improve margins,

grow, or to implement a reinvented business model, applying technology is the vehicle to make it happen. This Technology Panel discussion will focus on current technology trends and where in the organization they will potentially have an impact. To that end, this discussion will examine new technologies (i.e. Artificial Intelligence (AI) and machine learning (ML) such as ChatGPT, Bard, and other large language models, robotic process automation (RPA), edge computing, telepresence and remote work, etc.), what they mean and why they matter to your business. Additionally, the panelists will examine the impact of technology in reinventing or redesigning organizations for greater effectiveness and efficiencies.

Join our panelists as they share stories of what has worked, challenges, and outcomes while leveraging new technologies in their organizations.

Rukevbe (Rukus) Esi, PMP, CIO, CTO, Digital Transformation & Technology Strategy, AvalonBay Communities

Amit Nanavati, VP Digital Products - Executive Leadership Group, **Northwestern Mutual**

Melissa Lee, E-Commerce, Data and Analytics Executive, General Mills

Moderator:

Tim Peter, Program Director, Digital Leadership & Transformation Council and Digital Marketing Strategy Council, **The Conference Board**

9:35 - 10:05 am **Session O1**

The TD SYNNEX Merger – A Tale of Two Companies Leveraging the Power of Us

TD SYNNEX brings together two of the biggest technology distributors (former Tech Data and SYNNEX) to deliver innovative technology aggregation and orchestration solutions via 22,000 co-workers around the world in 100+ countries. In September 2021, they merged to create a \$62.3 billion entity called TD SYNNEX. TD SYNNEX's business model entails distributing over 200K third-party product/solutions to its 1,500+ OEM/Vendor partners as well as developing and manufacturing its own products. Learn about the merger integration, digital transformation, it's evolving culture, and operating model. Join Laurie Shumake, VP of Global Talent Development, as she shares the TD SYNNEX story.

Laurie Shumake, VP of Talent Development, TD SYNNEX

10:05 - 10:25 am **Break**

10:25 -10:55 am **Session P1**

Johnson & Johnson: Building High Impact Organizations with Workforce Analytics

Doug Shagam will discuss how to use analytics and data to drive enhancements to global workforce planning practices and talent shortages. As the economy transforms at a rate faster than ever, how are practitioners adapting their technology and data platforms to meet future strategic needs and build skills?

What practices constitute the next practice in the use of internal and external data to inform talent investments and placements in evolved organizations?

Doug Shagam, Head, People Data and Insights, Johnson & Johnson

11:00 - 11:30 am Session Q1

Designing the HR Model to Leverage Synergies at Leica Biosystems

Join Elliot O'Glasser, Corporate HR Manager at Leica Biosystems, as he shares his experience in how to best engage during a company merger. Fundamental learnings will include how to lead a team with HR representation from both organizations, including co-leadership of design sessions, to keep a holistic, balanced view of the change while maximizing organizational outcomes.

Ken Thompson, CEO/Principal, AlignOrg Solutions

Elliot O'Glasser, Corporate HR Manager, Leica Biosystems

11:30 - 11:45 am Break

11:45 am - 12:15 pm Plenary Session R

Trauma and Resilience: Insights and Onsite Experience

In our closing conference session, we are honored to hear from the Chief of Human Capital at the Port Authority of New

York and New Jersey, who will share how the experience of inconceivable disaster in 2001 provided lessons and helped build resilience that carried into the challenges of the pandemic, and what has been learned on how to face whatever comes next. Following the talk, we will have an onsite interactive experience inspired by our conference location steps away from the 9/11 Memorial and Museum.

Mary Lee Hannell, Chief of Human Capital, Port Authority of New York and New Jersey

12:15 - 12:20 pm

Closing Remarks

Dottie Donnelly Brienza, Chief Human Resources Officer, Cambrex. Conference Chair

Adrienne D. Sims, PsyD., Chief Human Resources Officer, Indiana University Health, Conference Chair

$12{:}30-3{:}00~\text{pm}$ Curated Experience at the 9/11 Memorial and Museum

Join us for a curated experience at the 9/11 Memorial and Museum in Lower Manhattan. We will begin with observations by Susan Opotow, Professor at John Jay College of Criminal Justice and The Graduate Center of the City University and coeditor of a 2018 book New York After 9/11. Professor Opotow will discuss how 9/11's aftermath transformed New York City and describe the highlights of the 9/11 Memorial Museum. Participants will experience a self-guided tour of the Museum, with an opportunity to share, through the conference app, their own experiences and insights on change and resilience gained from the Museum experience.

CHANGE AND TRANSFORMATION CONFERENCE

DAY ONE Thursday, May 18, 2023

2:15 - 2:45 pm Session I2

Building Change Leadership and Sponsorship at Walmart

Learn how one of the globe's largest enterprises remains agile and innovative by developing executives into Change leaders. This case study will highlight the development, implementation, and results of a new program for Finance senior directors on how Walmart itself is changing, and show how the immersive experience equipped leaders to lead change and transformations today.

Felicia Bachman Chenault, Senior Director, Digital Acceleration, Change and Journey Management, **Walmart**

Théres Stiefer, Ed.D, Sr. Manager, Digital Acceleration, Change and Journey Management, **Walmart**

2:50 - 3:20 pm **Session J2**

Business Transformation at Visa

Visa's journey, which began at the birth of the credit card, led through innovation to the company becoming one of the largest payment networks on the planet, and the journey continues through disruption and nimble business transformation.

As new technology, new customer behaviors, and new business models call for continuing re-creation in so many industries, this case study shares key lessons on the cultural shifts needed to drive successful business transformation in an ever-changing landscape.

Stacey Taylor, Vice President, Culture and Change Management, **Visa**

3:25 - 4:05 pm Session K2

Panel: Data, Metrics, and Change Analytics

Industry-leading practitioners from the Conference Board's Change and Transformation Council will share key insights and examples on building Change Analytics capacity, examining topics such as:

- Establishing metrics
- Measurement tools
- Change Analytics Dashboards
- Data-Driven Change Strategies

Felicia Bachman Chenault, Senior Director, Digital Acceleration, Change and Journey Management, **Walmart** Leah N'Diaye, Director, Org Effectiveness Center of Excellence (COE), SVB a Division of First Citizen's Bank

Brian Storts, Director of Organizational Effectiveness and Change Management, **Sutter Health**

Astrid Uka, Chief Transformation Officer, US Regulated Industries, **Microsoft**

Moderator: Kent Greenes, Program Director, Change & Transformation Council, **The Conference Board**

4:05 – 4:20 pm **Break**

4:20 – 4:50 pm Plenary Session L

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Welcome

Dottie Donnelly Brienza, Chief Human Resources Officer, Cambrex, **Conference Chair**

8:50 - 9:30 am **Session N2**

Panel: Change Communications

Each of us is awash in messages – often algorithmically curated for maximum engagement – triggering responses that can vacillate between "going down the rabbit hole," or tuning out entirely. How can the messages that matter cut through the noise of our current communications environment? Hear from a group of Change communications leaders on what works, and what doesn't.

Carrie Altieri, Former VP, Internal & Executive Communications, Kyndryl

Laura Paredes, Senior Director Corporate Communications, United States Steel

Chad Waryas, Director, Change Management & Employee Engagement, **Comcast**

Moderator: Jennifer Mauer, Head of Global Communications and Corporate Brand, **Viatris**

9:35 - 10:20 am **Session O2**

Panel: Simplifying Change – Emerging Tools and Techniques

More and more Change and Transformation leaders are seeing simplification as the key to extending Change capability throughout an enterprise. Explore examples of the streamlined tools, plain communication, and new techniques that have been emerging to address the overwhelming Change challenges of recent years.

Ananda Akers, Senior Director, Organizational Change Management and Deployment, **DaVita Kidney Care**

Matthew Cole, Organizational Change Manager, State Farm

Karl Johnson, Global Head, Strategic Capabilities Practice, Mars

Zachary Shoup, Director Enterprise Capability, Change, and Communication, **Edward Jones**

Moderator: Laura Broughton, Principal Designer, Silicon Valley Bank, a Division of First Citizens Bank

10:20 – 10:30 am **Break**

10:30 - 11:30 am Session P2

Interactive Workshop: Reimagining Design Thinking and Personas for Effective Change Management

A highly participatory workshop on how to use design thinking

for effective change management. Learn how mission-driven changemakers can reimagine design thinking to move beyond post-it notes to create sticky, systemic change. We will focus on building impactful prototypes of personas and iterating on them *quickly*, and plotting personas on frameworks to uncover actionable and creative insights for your overall change management strategy.

fahad punjwani, Founder & Facilitator, Suchee Studios

11:30 – 11:45 am **Break**

11:45 am - 12:15 pm Plenary Session R

Trauma and Resilience: Insights and Onsite Experience

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$12{:}30-3{:}00~\text{pm}$ Curated Experience at the 9/11 Memorial and Museum

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