



**Empowering Change Leaders to Enable  
Data-Driven Insights, Transformational  
Tools, and New Digital Cultures**

16th Annual **Change and  
Transformation  
CONFERENCE**

**Conference:**

**June 14–15, 2018**

New York Marriott Downtown  
New York, NY

**Pre-Conference Seminar:**

**Change Implementation:**

**Map and Manage a Successful Journey**

**June 13, 2018**

Convene at 101 Greenwich St.  
New York, NY

[www.conferenceboard.org/change](http://www.conferenceboard.org/change)

Lead Sponsor:



Pre-Conference Seminar Sponsored by:



# Pre-Conference Seminar Change Implementation: Map and Manage a Successful Journey

Sponsored by  **ALIGNORG**  
SOLUTIONS

**Location:** Convene, 101 Greenwich Street  
Hub 3 – 3<sup>rd</sup> floor, New York, NY 10006

## Wednesday, June 13, 2018

Registration: 8:00 – 9:00 am

Networking Breakfast: 8:00 – 9:00 am

9:00 am - 9:15 am

### Seminar Opening and Welcome

**Julie Salmon**, Program Director, **The Conference Board**

Workshop Part I: 9:15 am – 12:00 pm

This highly interactive session will feature an integrated approach that will help you shape your transformation initiative from project set-up through planning to realization. Beginning with an integrated Journey Management map and a planning process that links launch plans for people, process, and technology with change management, the day will feature frameworks and tools that will facilitate the process. Sample tools include change readiness assessments and an innovative core messaging approach. Participants will engage with the tools to learn how they could be applied in their own situation. A case study will highlight the HRBP Transformation Journey at Atlassian, highlighting how they have used these same tools and approaches to produce real, and sustained, change.

**Reed Deshler**, Principal, **AlignOrg Solutions**

**Chanda Guth**, VP, Head of HR Business Partners, **Atlassian**

**Mike Smith**, Principal, **AlignOrg Solutions**

Morning Networking Break: 10:15 – 10:30 am

Networking Luncheon: 12:00 - 1:00 pm

Workshop Part II: 1:00 – 4:45 pm

The afternoon session will spotlight the power of creating leadership alignment and identifying strategic cultural behaviors and leadership practices needed for success. Stumbling blocks to effective organization design implementation will be identified, along with building blocks to

overcome them. A case study on the end-to-end journey for corporate functions at Medtronic will include both their successes and lessons learned. Participants will leave the full-day session with tools and insights to enable success on their own organization's transformation journey.

**Christy Blake**, Senior HR Director – Global Functions,  
**Medtronic**

**Reed Deshler**, Principal, **AlignOrg Solutions**

**Mike Smith**, Principal, **AlignOrg Solutions**

Afternoon Networking Break: 2:45 – 3:00 pm

4:45 - 5:00 pm

### Seminar Closing

**Julie Salmon**, Program Director, **The Conference Board**

## AGENDA

### Day 1: Thursday, June 14, 2018

Registration and Continental Breakfast: 8 – 9 am

Welcome and Introductions: 9 – 9:10 am

**Thaiz Chanman**, Senior Director, Culture, Change & Organizational Effectiveness, **Vizient**, Conference Chair

9:10 – 9:30 am

### Idea Exchange: Challenges and Connections

We begin by connecting with and learning from each other in this focused, interactive exercise.

9:30 – 10:15 am

### Fueling Perpetual Reinvention: Unlocking the Three Things that Change Everything

Companies poised to lead the future don't view business transformation as a discrete initiative accompanied by a project plan, start date, or end date. They view it as a perpetual state of existence. They're positioned to thrive going forward because they have not only sound strategies and smart operations but the organizational muscle required to fuel permanent reinvention.

Yet many companies today are struggling to bridge this gap from "transformation as project" to "transformation as mindset". For leaders frustrated by the time, effort, and resources wasted in attacking each new wave of transformation from square one, there are three things that change everything: a compelling story, committed leadership, and an intentional roadmap. In this session, learn the six levers – from symbols to energy – that shape what employees experience each day, and how those dimensions can be harmonized to create a climate for enduring adaptation and performance.

**Maril MacDonald**, Founder and CEO, **Gagen MacDonald**

10:15 – 11:00 am

### Digital Requires Narrative for the Soul

#### Change and Transformation Council - Panel Presentation

C&T professionals understand that digital transformation is not only a shift in processes; business models; strategies, or behaviors; it also calls for a shift in individual beliefs and organizational culture. That requires a *narrative* with meaning for each employee at each stage of the journey.

Members of The Conference Board's Council on Change and Transformation will challenge themselves – and attendees – to address what's really needed to achieve this fundamental shift at the heart of digital transformation. This interactive session will consider issues such as:

For sponsorship opportunities, please contact [michael.felden@conferenceboard.org](mailto:michael.felden@conferenceboard.org)

- Leadership support for the goal of truly changing minds
- Understanding different cultural milestones for different stages of the transformation journey;
- Facing fears of digital eliminating jobs;
- The challenges and potential benefits of generational diversity in co-creating a digital culture

#### Panelists

**Jerry Foster**, Lead Change Management Strategist,  
**Chesapeake Energy Corporation**

**Mark Dollins**, Fmr. Head of Executive & Global Employee Communications, **DuPont**

**Craig Hawkins**, R&D Digital Transformation Leader,  
**Procter & Gamble**

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

**Nina Swanson**, Sr. Director, Talent Strategy, US eCommerce,  
**Walmart**

#### Moderator

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

Networking Refreshment Break: 11:00 – 11:15 am

11:15 – 11:30 am

### Transformed Tools and Techniques: Using Video to Engage in CM on Many Levels

Over the course of the day, C&T leaders will introduce and demonstrate new, or new transformations of, tools and techniques being used to enable change in their organizations. We will conclude our day with an interactive session comparing and digging deeper with all the tools presented.

**Craig Hawkins**, R&D Digital Transformation Leader,  
**Procter & Gamble**

**Shawn Wasson**, Change Management Director, **Cummins**

11:30 am – 12:15 pm

### One Toyota: Engaging Employees in a Bold Transformation to Create a Single, More Innovative Culture

In 2014, Toyota North America's R&D, manufacturing, marketing and sales, and financial services operations launched a transformative journey to bring together these disparate organizations physically, operationally and culturally to create a more responsive, collaborative and innovative culture that challenged team members to "work differently." Three years later, this massive, billion-plus dollar effort to relocate and reorganize its operations and thousands of its team members culminated in the opening of the One Toyota North America campus in Plano, TX, and new facilities in Michigan and Kentucky.

How were team members across the continent engaged and supported through this huge multi-year change – leading to record-breaking numbers of team members committing to relocate, higher satisfaction scores and some of the best operational performance years on record – in a timeframe experts said was not possible to meet?

Learn from a top executive who helped design and lead the effort that inspired the company's greatest asset – it's people – to join the call to "Start Their Impossible!"

**Cheryl Hughes**, Chief Human Resources Officer,  
**Toyota Motor North America**

12:15 pm – 12:30 pm

### Transformed Tools and Techniques: Gamification

Learn how Johnson & Johnson is using gamification at its most engaging to communicate, train, and build enthusiasm while driving change.

**Colleen Perrin**, Global Organizational Communication Leader, Consumer, **Johnson & Johnson**

Networking Lunch: 12:30 – 1:30 pm

Concurrent Breakout Session: 1:30 – 2:00 pm

### The Invisible Lever of Transformation: How Leaders Can Shift Organizational Energy to Unleash Potential

When thousands of employees come together, unleash shared, positive energy, and harness that force in a strategic direction, companies can achieve amazing results, quickly. For organizations undergoing significant change, strong strategies and smart plans stand little chance of success if its people can't – or won't – muster the energy to make it happen. *So how do you change an organization's energy?* In this highly hands-on, experiential breakout session, work with leaders from strategy execution firm Gagen MacDonald to better understand the factors that yield organizational energy and how you can steer that energy to make your company's transformation successful.

**MaryCay Durrant**, Leadership Consultant, **Gagen MacDonald**  
**Jennifer Mauer**, Vice President of Enterprise Transformation & Change Strategic Communications, **Bristol-Myers Squibb**

Concurrent Breakout Session: 1:30 – 2:00 pm

### Putting Core Beliefs at the Core of a Change Strategy

Higher education faces huge shifts demanding change, and in many cases also must contend with greater resistance to change. Learn through case studies how a deep understanding of existing core beliefs and culture formed the basis of more effective change strategies in this challenging environment and take back new approaches to drive transformation in your organization.

**Fredrick Martin**, Senior Director, Change Management,  
**University of Virginia**

Concurrent Breakout Session: 2:05 – 2:35 pm

### CVS Health: Increasing Change Capability across the Enterprise

Learn how CVS Health transformed the relationship between its CM Center of Excellence and the HR Business Partners to dramatically increase change management capability and impact across the enterprise. CVS Health will highlight a

business example of how collaboration and consultation increase capacity, how technology supports the change capability, how integrated change strategies and tools support a Business Unit to sustain changes long term.

**Melissa Wood**, Director, Enterprise Change Management, **CVS Health**

**Krista Leoncavallo**, Senior Advisor, Enterprise Change Management, **CVS Health**

**Nicolle Horstmann**, Senior. Advisor, Enterprise Change Management, **CVS Health**

Concurrent Breakout Session: 2:05 – 2:35 pm

### **Making Corporate Communicators Allies for Change**

The most powerful and fundamental tool in managing change is communication, and corporate communicators among the most important partners in change. In this session we will track a mega-merger and restructuring of two American icons to unlock strategies and tactics for change communications. The session will show change leaders how to build a great partnership with corporate communicators; the essentials of a communication plan; and what metrics indicate whether the plan worked.

**Mark Dollins**, Fmr. Head of Executive & Global Employee Communications, **DuPont**

Concurrent Breakout Session: 2:40 – 3:10 pm

### **Change Management Styles and How to Cultivate Them**

Among the most important data and insight a change leader can bring to any challenge is an understanding of his or her own change management style. Personality, change style and emotional intelligence converge in how we show up in the context of organizational change. Understanding where we are and what we are in the process of becoming as change managers is essential to our success. What personality traits and emotional intelligence skills do you bear and what is your impact on the human experience of those involved in the change work? What are your strengths and how do you best use yourself for positive outcomes? Hear the perspective of a former professional counselor who brings his knowledge of human relations skills to his change work. He will share a framework useful for understanding change manager styles.

**Bill Bartlett**, Vice President, Organizational Development, **Novant Health**

Concurrent Breakout Session: 2:40 – 3:10 pm

### **M&A Transformations: Managing Change in the Cognitive Age**

Combining cultures and managing changing structures and practices during and after an acquisition has always been an especially demanding and crucial challenge. How does that challenge shift when one's organization is also driving cognitive solutions across every line of business? Learn how IBM's internal organizational change function has evolved to respond to evolving merger and partnership integrations while it is also adopting new business practices and harvesting the power of big data.

**Keith Crosby**, Global Acquisition & Outsourcing Leadership and Change Leader, **IBM**

Networking Refreshment Break: 3:10 – 3:25 pm

Concurrent Breakout Session: 3:25 – 4:00 pm

### **Experience How Baxter's Global Transformation Tour Empowered Managers to Drive Change**

To engage and empower managers to drive a culture of change, Baxter embarked on a global Transformation Tour, using a music theme and cross-functional team experiences to identify barriers to change; innovate on actions to overcome the barriers; and share results. Experience a version of this journey yourself and take home a new tool for changing the tune in your organization's culture.

**Karolina Bjorkman**, Senior Manager, Talent Management, **Baxter International**

Concurrent Breakout Session: 3:25 – 4:00 pm

### **The Change Dashboard: Capturing and Merging Data Streams to See the True Change Universe of Your Organization**

It is likely that every department of your organization, right now, is enacting change, either through a form of project management and/or a formal change initiative. What if you could capture that universe of change on one dashboard? What could you learn about change collision? Comparative success of different techniques? Future challenges? Learn how such a change dashboard can be implemented, the data it captures, and the opportunities it reveals.

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

4:05 – 4:20 pm

### **Transformed Tools and Techniques: Ignite Change Through Storytelling**

Storytelling to learn and inform isn't new, but using it as a change transformation tool is different. It's about mining your organization's histories and experiences for content to convey what's possible when faced with significant change. Sourced in this way, storytelling can be used to co-create an organizations future by challenging and shifting mindsets for new possibilities. This brief session will focus on the sourcing aspect of storytelling for change, as well as provide a step-by-step guide and a checklist to kick-start your efforts to ignite change in your company.

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

4:20 – 5:00 pm

### **Deeper Dive: Answering Your Questions about Transformed Tools and Techniques**

Over the course of the day, we will be collecting your questions about the transformed tools and techniques discussed in previous sessions. Now we bring all our Tools and Techniques speakers together to answer your questions, share further insights, and discuss implementation strategies.

**Colleen Perrin**, Global Organizational Communication Leader, Consumer, **Johnson & Johnson**

**Craig Hawkins**, R&D Digital Transformation Leader, **Procter & Gamble**

**Shawn Wasson**, Change Management Director, **Cummins**

**For sponsorship opportunities, please contact [michael.felden@conferenceboard.org](mailto:michael.felden@conferenceboard.org)**

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

Closing Remarks 5:00 – 5:10 pm

**Thaiz Chanman**, Senior Director, Culture, Change & Organizational Effectiveness, **Vizient**, Conference Chair

Networking Reception: 5:10 – 6:10 pm

---

## Day 2: Friday, June 15, 2018

Registration: 8:00 – 9:00 am

8:00 – 9:30 am

### Breakfast Roundtables

Members of The Conference Board's Council on Change and Transformation will lead highly interactive roundtables in which participants will respond to a provocative prompt on some of the biggest challenges in C&T. Responses will be recorded and shared with all attendees. Topics include:

- Starting Up a CM Function
- Transformation is a Team Sport
- Change Networks and Communities
- Change Data & Analytics
- Getting Sponsorship Right
- Knowing the Behavior You Want to Change
- Plus, topics suggested and selected by Conference attendees

Welcome and Introduction to Day 2: 9:30 – 9:40 am

**Thaiz Chanman**, Senior Director, Culture, Change & Organizational Effectiveness, **Vizient**, Conference Chair

9:40 – 10:20 am

### How the Navy Digital Warfare Office is Transforming the Way Commanders Think about Data and Problem Solving

Is there any organization in which the need for agility and resilience, the ability to manage change, is greater than it is in the military? Is there any change mission with higher stakes? Or one where the reasons to embrace digital transformation and the power of data analytics are more compelling? In this one-on-one conversation with the Director of the Navy Digital Warfare Office, we will explore how commanders are being given the language, tools and techniques to move from seeing a problem to seeing an opportunity for data-driven insights.

**Margaret Palmieri**, Director, **Navy Digital Warfare Office**

**Dr. Charles Popper**, Program Director, CIO Business Council; Co-Leader, Digital Transformation Center, **The Conference Board**

10:20 – 11:00 am

### The Post-Digital Perspective: AI, Machine Learning, and Continuing Change at Google

We sometimes speak of "digital transformation" as a process that – however challenging – has a beginning, middle and end.

But of course, the transformations required of digital organizations never end, as digital itself only accelerates the change possibilities. Use this change case study from the ultimate digital native, Google, to see the future opportunities and challenges for your organization post digital transformation.

**Shannon Mahon**, Organization Development Consultant, **Google**

Networking Refreshment Break: 11:00 – 11:15 am

11:15 am – 12:00 pm

### Wells Fargo: Designing for Positive Change in Difficult Times

Design Thinking is about solutions, not problems. It starts with a positive, co-creating attitude that values people and considers how they interact with the world around them. Through iteration, collaboration and visualization, design thinking provides approaches and tools to foster alignment, drive innovation, and mitigate risk. Team members at Wells Fargo are using design thinking to evolve new ways of working, model new cultural behaviors, and create sustainable competitive advantage.

**Jonathan Alloy**, Vice President, Innovation, **Wells Fargo**

12:00 – 12:30 pm

### Capstone Idea Exchange: Reflecting on our Experiences, Creating for the Future

Fittingly, we will cap off the conference as we began it: with a focused exchange of ideas, now informed by the experiences gained over the last two days. Build on your peers' insights as you share:

- What might you do differently in the future based on the learnings of the last two days?
- What changes will your organizations be managing in 2021?
- What skills, tools and organizational capabilities will be most needed to manage those changes and transformations?
- What themes and topics are you excited to explore further at our next gathering?

Closing Remarks 12:30 – 12:40 pm

**Thaiz Chanman**, Senior Director, Culture, Change & Organizational Effectiveness, **Vizient**, Conference Chair

Conference Closes 12:40 pm

# REGISTRATION INFORMATION

**Online** [www.conferenceboard.org/change](http://www.conferenceboard.org/change)

**Email** [customer.service@conferenceboard.org](mailto:customer.service@conferenceboard.org)

**Phone** 212.339.0345

8:30 am – 5:30 pm ET, Monday – Friday

## Conference Pricing:

**June 14-15, 2018, New York Marriott Downtown, New York, NY**

<b>Members</b>	<b>\$2,295</b>
<b>Non-Members</b>	<b>\$2,895</b>

## Pre-Conference Seminar Pricing:

**June 13, 2018, Convene at 101 Greenwich St., New York, NY**

<b>Members</b>	<b>\$1,035</b>
<b>Non-Members</b>	<b>\$1,235</b>

Fees do not include hotel accommodations.

## Conference Location and Accommodations

### **New York Marriott Downtown**

85 West St.

New York, 10006

Tel **212.385.4900**

Hotel reservations cut-off date: **May 30, 2018**

## Pre-Conference Location

### **Convene**

101 Greenwich St.

New York, 10006

Tel **212.759.0900**

## Cancellation Policy

Full refund until three weeks before the meeting. \$500 administration fee up to two weeks before the meeting. No refund after two weeks before the meeting. Confirmed registrants who fail to attend and do not cancel prior to the meeting will be charged the entire registration fee.

## Team Discounts per Person

For a team of three or more registering from the same company at the same time, take \$300 off each person's registration. One discount per registration. Multiple discounts may not be combined.

[www.conferenceboard.org/change](http://www.conferenceboard.org/change)

©2018 The Conference Board, Inc. All rights reserved.  
Program subject to change. March 2018

**THE CONFERENCE BOARD**  
Trusted Insights for Business Worldwide

