



**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

Reception Sponsor:



Pre-Conference Seminar Sponsored by:



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

Sponsored by



Location: Convene, 101 Greenwich Street
Hub 3 – 3rd 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 – 9:15 am

9:15 – 10:00 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**

10:00 – 10:45 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:

- 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

For sponsorship opportunities, please contact michael.felden@conferenceboard.org

Panelists

Jerry Foster, Lead Business Process Strategist,
Chesapeake Energy Corporation

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: 10:45 – 11:00 am

11:00 – 11:15 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**

11:15 am – 12:00 pm

One Toyota: Engaging Employees in a Radical Transformation to Create a Single, More Resilient Culture

In 2014 Toyota North America began a transformative journey to bring together physically, organizationally and culturally the disparate sales, manufacturing and corporate cultures that had developed in different locations across North America. In June 2017 this massive, billion-dollar effort to unite disparate elements culminated in the opening of the One Toyota North America campus in Plano, Texas. How were employees across the continent prepared, engaged and supported through this huge change – leading to a remarkably high percentage of employees committing to relocate? How were siloes broken down and cultures merged? How were individuals empowered to become part of a single, more agile and resilient culture? How were change leaders empowered and change capacity built and deployed throughout the organization? Learn from the leader who helped employees across a continent manage this transformation.

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

12:00 pm – 12:15 pm

Transformed Tools and Techniques: Gamification

Networking Lunch: 12:15 – 1:15 pm

Concurrent Breakout Session: 1:15 – 1:45 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: 1:15 – 1:45 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: 1:50 – 2:20 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

Concurrent Breakout Session: 1:50 – 2:20 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: 2:25 – 2:55 pm

Bank of America: Agile Change Management in an End-to End Technology Transformation

Some may think that creating change in the technology world should be easy; but Change leaders know all too well how hard it can be. Bank of America Technology Executive Dave Matthews will talk about creating change on a huge scale, in a highly regulated environment with highly opinionated constituents who can be resistant to change. And if that is not enough, you also will find out how to make the elephant dance by adapting change management plans to Agile project management.

Dave Matthews, Head of Enterprise Technology Architecture and Shared Capabilities, **Bank of America**

Concurrent Breakout Session: 2:25 – 2:55 pm

Interactive: 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**

Sasha Diskin, Director, **Talent Management Baxter International**

Networking Refreshment Break: 2:55 – 3:10 pm

3:10 – 3:25 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**

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**

4:00 – 4:30 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.

Closing Remarks 4:30 – 4:45 pm

Networking Reception: 4:45 – 5:45 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 CM
- Transformation is a Team Sport
- Change Analytics
- Getting Sponsorship Right
- Mandated vs Organic Change
- Plus, topics suggested and selected by Conference attendees

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

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 Google Perspective: AI, Machine Learning, and Continuing Change Post Digital Transformation

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

Tapping the Wisdom of the Crowd: The Changes We Will be Managing in 2021

- Using the Sli.do polling platform, we will draw on the wisdom of the entire conference to consider:
- 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?
- Are you and your organization on a path to develop those capabilities?

Conference Closes 12:30 pm

REGISTRATION INFORMATION

Online www.conferenceboard.org/change

Email 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

Members	\$2,295
Non-Members	\$2,895

Pre-Conference Seminar Pricing:

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

Members	\$1,035
Non-Members	\$1,235

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.

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