



Organizational Transformation: Where Change Meets the Human Experience

May 14 – 15, 2026
New York Marriott at the
Brooklyn Bridge
Brooklyn, NY

Lead Sponsors

AlixPartners

STRATEGIA
/Analytics

A Different World • A Different Approach

Organizational Transformation: Where Change Meets the Human Experience

May 14-15, 2026

Brooklyn, NY

DAY ONE

Thursday, May 14, 2026

7:30 am – 8:30 am

Registration and Networking Breakfast

8:30 am – 8:40 am

Welcome and Introductions

8:40 am – 8:55 am

Networking and Cross Pollination

We will kick off our event by meeting one another to share our top goals for the event.

9:00 am – 9:30 am

The Essential Mission: The CEO as Transformational Leader

We will explore the perspective from the top on what is needed – at all levels – to bring together humans and technology to effectuate extraordinary innovation. How do we build agility and resilience in both individuals and organizations? What skills are required of leaders at this pivotal time?

9:35 am – 10:05 am

Thriving Amid Constant Change: Meet the Octopus Organization

In today's nonlinear, uncertain, and constantly evolving world, we know that rigid, top-down transformation attempts rarely succeed. What's needed for this moment, Amazon Executives in Residence Jana Werner and Phil Le-Brun argue, is not merely a new process but a new paradigm: *The Octopus Organization*. Jana and Phil will share what it means to have a structure and culture that leads to adaptability and innovation in every arm of your business – and what it takes to get there.

Jana Werner, Executive in Residence, Enterprise Strategy, **Amazon Web Services**, and **Phil Le-Brun**, Executive in Residence, Enterprise Strategy, **Amazon Web Services**; co-authors, *The Octopus Organization: A Guide to Thriving in a World of Continuous Transformation*

10:05 am – 10:25 am

Meet & Connect

10:25 am – 10:40 am

Interactive Exercise: Brainstorming the Future

What are the biggest differences you expect in your organization and industry by this time in 2027? And what adaptations will be needed to succeed in that future state? Together with your peers you will brainstorm, and then share, the challenges, opportunities and shifts you see ahead.

10:40 am – 11:10 am

You've Torn Up Your Org Chart. Now What?

Silos, unnecessary layers, labor hours that could be replaced by technology: we know these must be broken down or eliminated for an organization to thrive today. But do we know what replaces it? We will explore what happens after the org chart is blown up, and ask: does the process of designing a new structure need to be reinvented as well?

11:15 am – 11:45 am

From Investment to Impact: What Really Drives Successful AI Transformation

It seems as if every organization is either engaged in an AI-focused transformation, or preparing for one. Yet neither large investments nor even broad AI adoption are guarantees of success. Drawing on surveys of leaders and workers as well as interviews with enterprise executives, we will share insights on how leaders must redesign their organizations to maximize the value of AI within their enterprises and the expectations employees have about this technological revolution.

Robin Erickson, PhD, Head of Human Capital Research, **The Conference Board**

Matt Rosenbaum, Principal Researcher, Human Capital, **The Conference Board**

11:50 am – 12:25 pm

How AI Could Reinvent Change Management Itself

AI not only presents a crucial challenge for C&T leaders – it presents an opportunity, even an imperative, to reinvent change management itself. In this discussion among leaders across sectors, we will explore the ways their processes are evolving to meet the AI moment, and the ways AI is itself enhancing capability, tools, and measurement.

Moderator: **Laura Broughton**, Global Director, Organizational Design and Talent Planning, **Mars**

12:30 pm – 1:30 pm

Networking Lunch

1:40 pm – 2:10 pm **Concurrent Session 1A**

Case Study: Move Fast and Fix Things – Process Transformation and the Real Secret to Uncovering AI Value

True transformation lies in the often-overlooked hard work of cleaning up your data, reimagining processes, and articulating a clear, measurable outcome. Skip these steps and your AI efforts will not achieve the value advertised. Join TD Bank's Process Transformation team for a case study on going back to basics, to uncover AI value without losing speed or focus toward your AI goals. They will be sharing the why behind their approach, how they organized the work across multiple processes at once, and the change management they've employed.

Sarah Keizer, Vice President, Business Transformation, **TD Bank**

1:40 pm – 2:10 pm **Concurrent Session 1B**

Case Study: Your Reorganization Can't Succeed Without a Talent Strategy

Times of disruption – mergers, acquisitions, reorganizations – bring engagement and retention challenges. But a talent strategy that provides development opportunities can not only boost engagement, it can lead to measurable business results. Learn how Frontier Communications, in anticipation of acquisition by Verizon, launched an initiative focused on upskilling, internal mobility, and engagement that yielded cost savings while building skills.

Ariel Leonard, Senior Vice President of Talent, **Frontier Communications**

For sponsorship opportunities, please contact aabidi@tcb.org

2:15 pm – 2:45 pm **Concurrent Session 2A**

Can We Transform Without Trust? Redefining Leadership in the Age of AI

According to recent Deloitte research, employee trust in generative AI dropped 42% in the last six months of 2025, and trust in agentic AI fell 64% in the last quarter. In this session, Adam Schreiber examines what this trust decline means for leaders navigating rapid technological change. We will explore how leadership roles are evolving, how to balance human centric principles with AI-driven transformation, and how to upskill teams while sustaining morale.

Adam Schreiber, Senior Director, Head of Transformations, Change & Communications, **PepsiCo**

2:15 pm – 2:45 pm **Concurrent Session 2B**

The Unresolved Leadership Decisions That Can Derail Your Merger or Acquisition

While most of the attention in mergers and acquisitions is focused on strategy and deal execution, outcomes are most often determined by a small set of leadership decisions made shortly after the ink dries. In this session, Dr. Klint Kendrick draws on patterns observed across hundreds of post-merger integrations to examine five leadership decisions that consistently determine whether M&A integrations will create value. These decisions, often delayed or left implicit, compound over time and shape execution, retention, and value realization. Participants will explore why M&A outcomes diverge after close, even among well-structured deals; how unresolved leadership decisions create hidden costs; and what leaders can clarify early to support sustained value creation.

Klint Kendrick, Ph.D., Adjunct Instructor, Human Capital Management, **New York University**

2:45 pm – 3:15 pm

Meet & Connect

3:15 pm – 3:55 pm

Interactive Workshop: The Change Lab

In an era of perpetual disruption, the ability to manage continuous change is a high-stakes strategic imperative. For senior leadership, the primary challenge lies in the "Execution Gap," where well-defined strategies collide with the invisible complexities of organizational reality. This interactive session provides a rigorous framework for identifying hidden risks and leveraging your "Organizational DNA." Participants will select and assess interventions, and the presenters will model the risk and impact on performance.

Dr. Miles Overholt, CEO, **Strategia Analytics**

Dr. David F. Lopez, SVP Systems Research, **Strategia Analytics**

Moderator: Klint Kendrick, Ph.D., Adjunct Instructor, Human Capital Management, **New York University**

4:00 pm – 4:15 pm

Speed Debates

What is your most controversial opinion on the challenges ahead? What are the best arguments for it, and against it? In this interactive exercise, we seek to open minds and create connections by asking attendees to debate with their neighbors several thorny propositions – and then switch sides after 60 seconds. Each topic will be revealed immediately before the debate.

4:15 pm – 4:45 pm

Is Any of This Possible Without a Culture That's Ready For It? Learning from Cultures that Embrace Change

How do you nurture and maintain a constant culture that's ready for constant change? We'll learn from organizations that have managed it. What makes for a culture that welcomes the new? What concrete factors shape attitudes over time? And how can you build them in your organization?

4:45 pm – 4:55 pm

What We've Learned So Far: Your Turn to Talk

4:55 pm – 5:00 pm

Day One Recap and Day Two Preview

5:00 pm – 6:00 pm

Networking Reception

DAY TWO

Friday, May 15, 2026

7:30 am – 8:30 am

Networking Breakfast and Registration

8:30 am – 8:40 am

Day Two Opening Remarks

8:40 am – 9:40 am

Networking Roundtables: Small Group Discussions and Report-Outs

Meet new people and learn from their varied perspectives while discussing change, transformation, and org design topics such as overcoming AI fears; structuring capacity; mergers and acquisitions; shifting culture; flattening structures; and more.

9:45 am – 10:15 am



The Reimagined Workplace: Meeting the New Challenges

The Conference Board began its annual research study on The Reimagined Workplace amid the workplace revolution triggered by COVID. Yet, even as the pandemic recedes in the rearview mirror, remarkable new political and technological developments have introduced fresh volatility and considerable uncertainty into the workplace. Learn from the latest Reimagined Workplace study how Human Capital leaders are responding, and what it may mean for your organization.

Robin Erickson, PhD, Head of Human Capital Research, **The Conference Board**

10:15 am – 10:35 am

Meet & Connect

For sponsorship opportunities, please contact aabidi@tcb.org

10:35 am – 11:05 am

The Data, Design, and Change that Drive AI Value Creation at S&P Global

To lead a workforce transformation in the age of AI, S&P Global built a workforce strategy in parallel with its business and technology strategies, and weaved an agility story that resonates with the human experience. Integrating workforce planning, organizational design and change management, S&P Global created an ecosystem that aligned skills supply and work task demand, and provided the language for human connection with the organizational strategy. Learn how these connections allowed human and AI collaboration to move beyond productivity to value creation.

Alan Susi, Vice President and Global Head of Organizational Planning and Analytics, S&P Global

11:10 am – 11:40 am

Building the Plane While It's in the Air: Constructing New Transformation Capabilities

We will explore how to stand up new capability in a rapidly fluctuating environment, and how to look for and develop the leadership skills needed throughout an organization in order for the efforts of a Transformation COE to succeed.

11:45 am – 12:15 pm

A Resilient Org Needs Resilient Humans: Wellbeing as the Beating Heart of Organizational Transformation

Is a change management or transformation strategy complete without a wellbeing strategy – one that recognizes the risks of stress, uncertainty, and burnout, and provides the support needed to build resilience? We will consider examples of nurturing wellbeing to build resilience, and their impact of performance.

12:15 pm – 12:25 pm

Interactive: Connecting the Dots and Taking Action

12:25 pm – 12:30 pm

Concluding Remarks