



HR Mergers & Acquisitions Roundtable

Annual Conference

SEP 22 & 23, 2020 VIRTUAL – FROM YOUR HOME

The HR M&A Roundtable Annual Conference is a unique immersive experience where participants learn from one another in the company of experts.

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#MandART2020

TWO DAYS FOCUSED ON DIFFERENT AREAS OF HR M&A

Choose Your Conference Focus: Day 1, Day 2 or Full Conference

DAY 1: M&A Facing Today's Challenges

- The Value of Leadership in Managing M&A Transformation
- Change Management for Now and Forever
- Partnering Across Functions
- Post COVID-19 M&A Transactions
- Latest in M&A/HR M&A Research

Benefits:

- Keynote Presentation
- Panel Discussion
- Two Roundtable Sessions
- Brunch and Learn
- Virtual Speed Networking Happy Hour

DAY 2: HR M&A Excellence in Action

- Secrets for HR from the IMO/PMO
- Total Rewards at Deal Speed
- Figuring out Cross-Border Deals
- M&A Talent Processes for D&I
- Cultural DD: Leveraging the Info Ecosystem
- HR M&A Learnings from the Front: Pandemic and Beyond

Benefits:

- Keynote Presentation
- Panel Discussion
- Two Roundtable Sessions
- Brunch and Learn
- M&A Happy Hour

Day 1 Only: \$249.⁰⁰

Day 2 Only: \$249.⁰⁰

Full Conference: \$449.⁰⁰

Register to attend this conference and to also support our year-round work!

M&A affects companies, employees, and communities, so doing M&A well makes a difference. The HR M&A Roundtable was created to provide a forum for M&A practitioners to develop both personally and professionally, making a difference for everybody involved in and affected by transactions. We provide free year-round programming, including roundtables, webinars, and happy hours; and have been conducting virtual programs for years! We also support graduate-level interns and promote professional M&A research, all with the goal of elevating our professional practice.

The HR M&A Roundtable relies on the Annual Conference to fund the infrastructure that makes our programming possible. Your \$449 full conference registration works out to \$37 a month, which not only provides access to our world-class conference, but helps ensure more than a dozen other learning and networking opportunities can take place every year. If you are unable to attend the conference and would like to support future HR M&A Roundtable events, you can donate [here](#).

REGISTER TODAY!



DAY 1 SEPTEMBER 22

Topics and Presenters

KEYNOTE

False Expectations or Poor Capability? Leading Global Transformation Demands Now and Into the Future

The vast majority of M&As do not deliver their expected benefits, with a common understanding that the main cause of failure lies in our efforts to lead and make the right decisions to integrate. Are we expecting too much from those with responsibility within our organizations? Is there a systemic issue around the ability of leadership to manage change?

Ben de Haldevang, founder of Agile Gorilla, will help answer this and other related questions. Ben recently interviewed over 100 senior program directors who have headed up over 30,000 M&A and transformation projects. During his research, he uncovered surprising and compelling findings, trends, and behaviors that influence what leads to success or failure. Ben will share what leadership and management actions are often overlooked and what is usually overemphasized, preventing value gain and overall M&A deal objectives. Crucial findings that can help you and your leaders make your next transaction a success.



Ben de Haldevang
Founder,
The Agile Gorilla

PANEL

M&A/HR M&A Research Findings and Emerging Trends

Because of its impact on business, researchers are constantly exploring ways to do better M&A. In this panel discussion, researcher/practitioners will share their findings on people, leadership, and culture in M&A and the impact for HR.

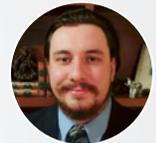
Keith, Jay and Brendan will share their findings on the role and impact that leaders and culture have on M&A and the implications and challenges that result for HR leaders to achieve transaction success. Each panel member will share their recent research findings on these topics including what's really important and why, what impacts integration success, and approaches for cultural assessment.



Dr. J. Keith Dunbar
Managing Partner,
JKD Talent Solutions



Jay Jamrog
Co-founder, Institute for
Corporate Productivity (i4cp)



Brendan McElroy
HR M&A Roundtable
Intern

ROUNDTABLES

Post COVID-19: How M&A Transactions Will Change

Innovative "sea change" comes when least expected and often after economic, political or social upheaval. Consider lasting changes to business travel after 9-11 or how banking practices changed after the Great Recession. In M&A, change occurred when due diligence moved from physical data rooms to virtual platforms. We now face changes to M&A strategies and approaches. How will we change identifying targets, and determining valuations? How will we meet the challenges of a more virtual PMO? How will acquiring and acquired leaders engage and interact? Join Rosylin to explore what has likely changed forever in M&A and how we are already responding and operating. Let's learn from what's already changed so we can anticipate the future and better respond.



Rosylin Johnson
Senior Director,
M&A and Divestitures,
McKesson Corporation

It's Not Magic – It's Change Management!

Managing change during mergers and acquisitions is key to success. Change management is equally as vital as ensuring robust project management, compelling communications, and lasting employee engagement. So why is it so difficult to successfully manage the change? Join Lynette as she leads participants through a discussion on how to think about change management, including practical tools and techniques, during each phase of the deal.



Lynette Buitt
M&A and OD Consultant,
Buitt Consulting, LLC

Getting in Early by Partnering Across Functions

Have you ever wondered how HR M&A teams can have a bigger impact earlier in the deal process? In addition to HR's key role in managing integration disputes and crises, HR can provide great support in finding people issues in due diligence and can even support deal negotiations. To make this difference, HR leaders must strengthen their relationships with Corporate Development and other M&A Centers of Excellence. Xiao and Dawn will share their insights on how HR can increase strategic value much earlier in the M&A deal process, and lead a robust conversation about strengthening partnerships across corporate teams.



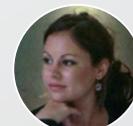
Dawn White
Manager of M&A COE,
Corning Incorporated



Xiao Chen
Director of Corporate Development,
Corning International

Making International Employee Transfers Go Smoothly

Turbulence and crisis not only impact operations, but they also create new opportunities. As the new normal sets in, many companies have resumed their plans for global expansion. This leaves HR, at the speed of the deal, to figure out how they will smoothly manage the employee transfer process. This requires us to balance between compliance, efficiency, and a positive day-one and beyond employee experience. Join Hannah Fowler from Globalization Partners and Gabrielle Symank, a senior HR M&A practitioner, as we explore how HR can evaluate and select the best available options to ensure the desired deal outcomes anywhere in the world.



Hannah Fowler
Director of Operations, EMEA,
Globalization Partners



Gabrielle Symank
Senior Internal HR M&A
Practitioner

Please Note: Conference schedule is subject to change.

[READ OUR SPEAKERS' FULL BIOS](#)

DAY 2 SEPTEMBER 23

Topics and Presenters

KEYNOTE

Secrets Revealed in Working with and Managing an IMO

Whether it is called an Integration Management Office (IMO) or a Project Management Office (PMO), it is the heartbeat and command center of the deal. This organization plays multiple and vital roles – driving milestones, ensuring cross-workstream coordination, allocating resources, and resolving issues; the IMO's leadership is key.

Drawing on their experience leading HR PMO's and cross-functional IMOs on dozens of deals, Craig Briscoe and Avneet Jolly will lead an exploration of the ways HR can drive even greater impact within the typical IMO structure and roles, including ways HR can become a force multiplier within the workstreams we typically lead. In addition, they will share their learnings on how best to manage external consulting firms, advisors, and vendors, along with how to manage competing priorities between your IMO role and your day job.



Craig Briscoe
Business Advisor,
Insightory Consulting



Avneet Jolly
Founder and Chief Consultant,
Insightory Consulting

PANEL

Challenges and Changes in HR M&A Work: During and Post Pandemic

HR M&A work has always been dynamic and often dramatic. The COVID-19 pandemic has certainly increased our challenges. Deal work has had to adapt and change. Traditional activities including due diligence, announce, job titling/leveling, total rewards harmonization, on-boarding and cultural integration have had to be either redesigned or reconsidered for new creative approaches. Join this panel of senior global HR M&A leaders to learn about how HR M&A work has changed, what changes may outlast the pandemic and become the "new better way" of operating and the lessons that shape future resilience.



Kison Patel
Founder and CEO,
DealRoom



Ashely Rice
Sr. Consultant
HR Acquisitions,
Cisco



Sallie Cunningham
HR Executive and
Integration Leader,
Cytiva

ROUNDTABLES

Total Rewards: Making the Best Decisions at the Speed of the Deal

One of the key challenges in the middle of a deal is determining how to move acquired employees into your total rewards structure fairly and efficiently. Information comes slowly, access can be limited, and speed is often more important than accuracy. However, these decisions have serious and lasting impact on employee engagement and retention. Join Ross to discuss the overall approach and specific tools that can help make these difficult decisions easier. He will explore job leveling and titling, use of cash and equity, and handling transitional employees. Ross will share ways to engage acquired managers, provide guidance to other HR practitioners, and ensure that critical functions and roles are harmonized.



Ross Popenoe
Global Compensation Leader,
GoDaddy

Applying Inclusive Design to M&A Processes

M&A is often a key vehicle for acquiring new capabilities, putting talent front and center of the M&A agenda. The talent of tomorrow is increasingly diverse across a full range of human characteristics including ability, language, culture, gender, age, race, ethnicity and other forms of human difference. Are our long-standing M&A talent processes inhibiting us from taking full advantage of the collective diversity of acquired talent? Fayruz, who heads Workforce Performance, Inclusion and Diversity, and Alex, Global Solution Leader - Transactions & Transformations, will lead a workshop using an inclusive design process to rethink the M&A approach to talent and the employee experience with the intended outcome of retaining and engaging employees to drive the deal value proposition.



Fayruz Kirtzman
Associate Client Partner,
Korn Ferry



Alex Jacobson
Global Solution Leader,
Korn Ferry

Cultural Due Diligence - Leveraging the Information Ecosystem

Industry leaders are beginning to appreciate the importance of culture to M&A success. According to a recent McKinsey study, 25% of executives cite cultural differences as the main reason for deal failure. Despite this sobering statistic, formal due diligence provides limited opportunities to understand an organization's culture. In this session, Mark and Clint will lead a discussion on creative ways to gather information about an acquired company's culture. They will share the places they go to find information about how a target operates and some of the tools they use to organize that information so it's useful during integration.



Dr. Clint Kendrick
Director, HR Strategic
Initiatives, SC Johnson



Mark Walztoni
Managing Director, HR M&A Diligence
& Talent Integration, Crowe LLP

"Dealing" With International/Cross-Border M&A

Nearly 40% of all M&A transactions cross the dotted lines on the map, resulting in added complexities for HR practitioners. Frequently cited challenges include understanding national cultures, determining geographic operating models, and ensuring the mindset moves from national to global. Sallie and Marsha will explore the challenges awaiting HR M&A practitioners, including total rewards harmonization, data privacy, diversity, and all of the other things that can make cross-border deals more challenging.



Marsha Findlay
HR M&A Leader,
McKesson



Sallie Cunningham
HR Executive and Integration
Leader, Cytiva

Please Note: Conference schedule is subject to change.

[READ OUR SPEAKERS' FULL BIOS](#)

PLUS THESE ADDITIONAL UNIQUE OPPORTUNITIES

DAY 1

BRUNCH AND LEARN, CHOOSE ONE:

OPTION 1

Personal Branding (Or Rebranding) in Times of Transition

Facilitator: Craig Briscoe

- Business Advisor, *Insightory Consulting*

It has never been more challenging to maintain an uninterrupted and meaningful career. Rapid and deep economic fluctuations impact business strategies and staffing requirements. Many of us are still thriving although maybe more insecure than before; while there is a growing number of us that are in or soon will be in "transition". This brunch and learn, hosted by Craig Briscoe, former head of HR M&A at Dell, will explore how to increase your personal competitive edge by leveraging and highlighting your M&A experiences to enhance your marketplace brand.

OPTION 2

M&A Train Wrecks

Facilitator: Dr. Susan Hanold

- Vice President HR Strategic Advisory Services, *ADP*

Despite our experience, playbooks, and checklists, we are often shocked by what we uncover when it's almost too late in the M&A process. Sharing these memorable challenges and how we responded can collectively build expertise and bolster self-confidence as an HR M&A leader. It is helpful to have a playbook to be sure, but it may be more beneficial to start a list of what might go wrong based on what was unanticipated and what followed. Join Susan Hanold for this confidential exchange of the strange and unusual happenings we've encountered during transactions. Join us to share the Outer Limits of M&A deals. There is real learning and, hopefully, lessons to learn only once!

ENDING PROGRAM

Speed Networking Happy Hour

Facilitator: Steven Steckler

- Steven J Steckler Consulting LLC

Are you ready to have fun while you grow your network? This speed networking session will give you a few minutes to weigh in on a variety of topics, ranging from your favorite things to do, how you've been weathering the pandemic, and even a little bit of M&A talk. Join us for a structured and confidential opportunity to both be yourself and share a bit of yourself. No regrets!

DAY 2

BRUNCH AND LEARN, CHOOSE ONE:

OPTION 1

From M&A Work to Cultivating Your Genius

Facilitator: Keeley Mooneyhan

- CEO, *HR Matters, Inc.*

M&A work can be an exciting high wire act, as many of us thrive on the challenge and thrill of the deal. Over time, this can lead to feeling burned out or stuck in our personal growth. This brunch and learn session, led by Keeley Mooneyhan of HR Matters, will explore ways we continue to grow by not just identifying our core competencies, but will focus on our areas of genius inside and outside of work. Join us for a confidential session on being vulnerable and honest with what makes us tick and sparks joy.

OPTION 2

Maintaining Culture During Times of Crisis: Blueprint for Action

Facilitator: Jay Jamrog

- Co-Founder, *Institute for Corporate Productivity (i4cp)*

Transforming or even maintaining your culture during periods of relative stability is a difficult undertaking. In times of chaos and catastrophe, it is almost beyond achievement. Jay Jamrog, from i4cp, will share recent research on what next practices and necessary actions differentiate high performing organizations with cultures worth maintaining from companies still struggling. The session, based on interviews with senior-ranking business executives and survey data collected from more than 7,600 business professionals at 348 organizations worldwide, along with other i4cp findings, will both confirm and challenge your assumptions.

ENDING PROGRAM

M&A Unhinged Happy Hour

Facilitator: Kison Patel

- Founder and CEO, *DealRoom*

Join Kison Patel, host of the M&A Science Podcast and founder of DealRoom, for a special conference-ending "what you share virtually, cannot be repeated virtually" session to exchange M&A "once in a lifetime is more than enough" stories about the strangest and craziest things that have happened during one of your transactions.

Please Note: Conference schedule is subject to change.

[READ OUR SPEAKERS' FULL BIOS](#)

VIRTUAL CONFERENCE SCHEDULE

DAY 1 – TUESDAY, SEPTEMBER 22, 2020

Program Begins: 8:00 am Pacific | 9:00 am Mountain | 10:00 am Central | 11:00 am Eastern

Welcome & Introductions

Keynote: **False Expectations or Poor Capability? Leading Global Transformation Demands Now and Into the Future**

Break

Concurrent Roundtables: Select One

Roundtable Choice

Roundtable Choice

Roundtable Choice

Roundtable Choice

Break

Brunch and Learn: Select One

Personal Branding (Or Rebranding) in Times of Transition

M&A Train Wrecks

Panel: **M&A/HR M&A Research Findings and Emerging Trends**

Break

Concurrent Roundtables: Select One

Roundtable Choice

Roundtable Choice

Roundtable Choice

Roundtable Choice

Break

Speed Networking Happy Hour

Program Ends: 3:00 pm Pacific | 4:00 pm Mountain | 5:00 pm Central | 6:00 pm Eastern

DAY 2 – WEDNESDAY, SEPTEMBER 23, 2020

Program Begins: 8:00 am Pacific | 9:00 am Mountain | 10:00 am Central | 11:00 am Eastern

Welcome & Introductions

Keynote: **Secrets Revealed in Working with and Managing an IMO**

Break

Concurrent Roundtables: Select One

Roundtable Choice

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Roundtable Choice

Break

Brunch and Learn: Select One

From M&A Work to Cultivating Your Genius

Maintaining Culture During Times of Crisis: Blueprint for Action

Break

Concurrent Roundtables: Select One

Roundtable Choice

Roundtable Choice

Roundtable Choice

Roundtable Choice

Break

Panel: **Challenges and Changes in HR M&A Work: During and Post-Pandemic**

M&A Unhinged Happy Hour

Program Ends: 3:00 pm Pacific | 4:00 pm Mountain | 5:00 pm Central | 6:00 pm Eastern

Please Note: Conference schedule is subject to change.

[REGISTER TODAY!](#)

LEARN WITH THE BEST M&A PROFESSIONALS IN THE INDUSTRY

KEY TAKEAWAYS:

- Expand your network and build relationships that make a difference when you find yourself in challenging situations
- Strengthen cross-functional collaboration, giving people, culture and leadership issues the deal impact they deserve
- Shape your total rewards and diversity practices to stimulate increased retention and engagement
- Enhance change management, communications and OD practices to better drive deal value
- Prepare for changes in the market by staying on top of the latest research, including how the pandemic will change M&A forever

WHO SHOULD ATTEND:

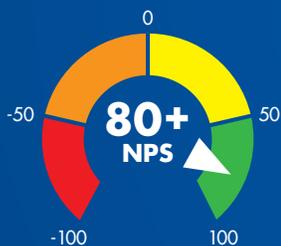
This conference is designed by M&A practitioners with decades of experience and thousands of deals behind them *exclusively* for those with hands-on M&A experience or expect to work on a deal in the next 12 months:

- HR M&A Leaders and Specialists
- CHROs
- HR Directors and HR Business Partners
- Change Management Professionals
- Compensation Managers
- Corporate Development Executives
- Integration Leaders
- M&A Consultants
- CFOs
- Employment Attorneys

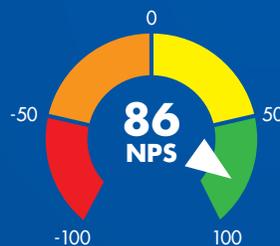
You will share your challenges and take away practical solutions based on years of collective experience and lessons learned. The Annual Conference features a mix of highly interactive roundtable breakout sessions, panel discussions and keynote presentations, each led by seasoned M&A experts from across the United States. You'll walk away with a stronger network you can leverage to enhance integration strategies, refine management tools and implement evidence-based solutions.

This two-day program will provide training, education, interaction and networking opportunities amongst the best in the M&A profession. The Annual Conference will examine the processes, methods, and technologies currently being used by seasoned expert acquirers leading and managing Mergers & Acquisitions.

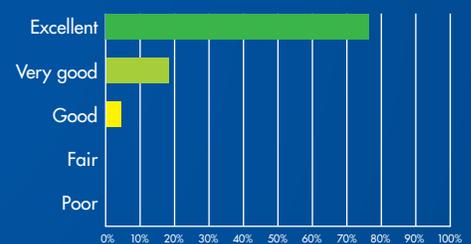
"World Class" Net Promoter Score



2019 HR M&A Conference Net Promoter Score



95% of 2019 attendees rated the conference either Very Good or Excellent



JOIN US FOR THIS WORLD CLASS EVENT!



HR MERGERS & ACQUISITIONS ROUNDTABLE

ANNUAL CONFERENCE

SIGN UP FOR THIS WORLD CLASS EVENT!

Day 1 Only: \$249.00

Day 2 Only: \$249.00

Full Conference: \$449.00

More info at MandARoundtable.com

Attendance is limited to ensure high-quality discussions. To attend, you must be actively involved in M&A or expect a transaction within the next 12 months.

REGISTER TODAY!



2019 Conference Survey Testimonials

"From the content, format, speakers and overall discussions, I would rate my experience as a 10+. The conference team did an amazing job with the variety of topics and by providing opportunities to engage with other HR M&A practitioners and hear best practices. I would highly recommend this conference to other HR practitioners!"

Amy Freshman, Sr. HR Director, ADP

"Networking, relevant topics, strong speakers"

"It was a great opportunity to learn from so many colleagues in this niche industry, much better than a traditional "presentation/lecture" format".

"Learning an incredible wealth of information. Making connections and building community with such professional subject experts".

"An amazing variety of speakers and experience levels. Everything was really well organized."

CONFERENCE LEADERSHIP TEAM

Dr. Klint Kendrick

Director, HR Strategic Initiatives,
SC Johnson
Conference Chair

Steven Steckler

Steven J Steckler Consulting LLC
Conference Co-Chair/Programming

Brenda Hastings

HR M&A Roundtable,
Executive Director

Sallie Cunningham

HR Executive and Integration
Leader, Cytiva

Dr. Susan Hanold

Vice President, HR Strategic
Advisory Services, ADP
Conference Logistics Management Team

David Lawlor

Chair, Conference Marketing Team

Rhonda Mahan

Senior Internal HR M&A Practitioner

Rey Ramirez Jr.

Conference Marketing Team

Gabrielle Symank

Senior Internal HR M&A Practitioner

Mark Walztoni

Managing Director, HR M&A Diligence
& Talent Integration, Crowe LLP
Chair, Conference Sponsorship Team

Dawn White

Manager of M&A COE,
Corning Incorporated

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As a global consulting organization, we transform businesses and improve outcomes for leaders, investors, and employees. Insightory works with clients in three main areas: Business Transformation, Talent and Compensation. Our consulting team is comprised of leading professionals who have over twenty years of functional leadership experience.



GLOBALIZATION
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Globalization Partners enables you to hire in 187 countries within days, and without the need to set up costly international subsidiaries. Your clients identify great talent anywhere in the world, and we put them on our fully compliant global payroll—lifting the burden of global corporate tax, legal, and HR matters from their shoulders to ours. Whether it's to test a new market or to hire internationally, we'll have your clients up and running in a new country in days, not months. 95% client satisfaction ratings and 96% global employee satisfaction ratings enables you to refer clients with confidence.

AND YOU!

Become a sponsor by registering and participating in the HR M&A Roundtable Conference. "Sponsor" and ensure your own year-round learning, networking and continuous opportunities to maintain your professional edge.

Check our [website](#) or [LinkedIn](#) page for more information.

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