

The **CEO** Forum GROUP

The Transformative CEO Community™

An aerial night view of a city skyline, likely New York City, featuring a large river and numerous illuminated skyscrapers. A network of white lines and dots is overlaid on the image, connecting various points across the city.

The Transformative CEO Series

“Business Transformation: Innovation, Human Capital and Growth”

4th Annual Transformative CEO Leadership Summit

March 21, 2024, 11 A.M. – 1 P.M. ET



“Fueled by societal changes, generative AI, and economic forces, CEOs will assume a central role in steering us toward a renaissance characterized by advancements in business, the economy, and society. Join us for our Annual Transformative CEO Summit, “Business Transformation: Innovation, Human Capital, and Growth,” where an assembly of top CEOs will dive into conversations on how this exciting new landscape can contribute to building a better world.”

Thank you for participating!

A handwritten signature in black ink, appearing to read 'RR', with a long, sweeping underline.

—Robert Reiss
Founder & CEO, The CEO Forum Group

AGENDA

Part A – 11:00am ET – 11:30am ET

Welcome and Opening Speakers

Opening presentations will set the stage for our CEO problem-solving Workgroups.

KEYNOTES



“The Three Imperatives of the Human Side of Business Transformation”

Joe Hart

CEO

Dale Carnegie Training



“Women Leadership”

Ida Liu

Head of Citi Private Bank

Citi Bank



“How Generative AI will change society and Business”

Gary J. Shapiro

Producer, **CES (Consumer Electronics Show)** &

President & CEO, **Consumer Technology Association**



“Leadership: Building a Great Culture During Crisis and Growth”

Lisa Luttoff-Perlo

Vice Chairman, **Royal Caribbean Group** &

Former CEO, **Celebrity Cruises**



“Lessons from Running Blockbuster and 7-11 and Driving Change in America through Education”

James Keyes

Former CEO

Blockbuster and 7-Eleven

Part B - 11:30am ET - 12:30pm ET

WORKGROUPS

We break out into six different CEO Work Groups addressing critical topics.

WORK GROUP 1: BUSINESS TRANSFORMATION



Workgroup Leader

Dan Heffernan

Chief Growth Officer

Dale Carnegie

Panelists:



Ida Liu

Head of Citi Private Bank

Citi Bank



Jim Rowley

CEO

Crunch Fitness



Judith Curr

President & Publisher

HarperOne Group aka HarperCollins

WORK GROUP 2: THE FUTURE OF INNOVATION IN TELECOM



Workgroup Leader

Michael Weening

CEO

Calix

Panelists:



Gary Shapiro

CEO

CTA (CES)



Jenifer Robertson

President

AT&T Consumer



Kate Johnson

CEO

Lumen Tech

WORK GROUP 3: THE PEOPLE SIDE OF STRATEGY



Workgroup Leader

Jessica Skon

CEO

BTS

Panelists:



Steve Jones

CEO

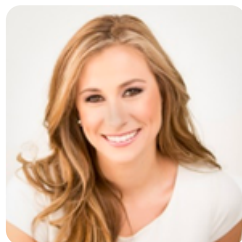
Allied Universal



Dr. Joseph Cacchione, MD

CEO

Jefferson



Brittany Castillo

CEO

Ashbrite



Mike Alkire

CEO

Premier, Inc.

WORK GROUP 4: BUILDING AN EXCEPTIONAL CULTURE



Workgroup Leader

Dr. David Rock

Co-Founder & CEO

NeuroLeadership Institute

Panelists:



Bill Burns

CEO

Zebra Technologies



Jamie Singleton

President

Signet Jewelers



Pete November

CEO

Ochsner Health

WORK GROUP 5: THE ROLE OF CHARACTER AND REPUTATION IN DRIVING GLOBAL SUCCESS



Workgroup Leader

Kip Morse

President & CEO

International Association of Better Business Bureau

Panelists:



Alex Bombeck

CEO

North Highland



Lisa Lutoff-Perlo

Vice Chairman

Royal Caribbean Group



Charles Gibb

CEO

Fever-Tree N.A.



Jesse Stockwell

Co-Founder & Managing Partner

Optima Tax Relief

WORK GROUP 6: DEVELOPING AGILE STRATEGIC PLANS



Workgroup Leader

Laura B. Cardinal, Ph.D.

Endowed Chair and Director, SmartState Center for Innovation + Commercialization,

SC Innovates

Panelists:



Jim Keyes

Former CEO

Blockbuster and 7-Eleven



Julie Caperton

Head

Wells Fargo, Private Bank



Joe Hart

CEO

Dale Carnegie

Part C - 12:30pm ET - 1:00pm ET

Solutions and Closing Remarks

Solution Presentations

Our six workgroup leaders present their solutions. Adjourn.

A Special Thanks to Our Thought Leadership Partners



BTS
[See more](#)



Calix
[See more](#)



NeuroLeadership
INSTITUTE

NeuroLeadership Institute
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Dale Carnegie
[See more](#)



Strategic
Management
Society

SMS
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IABBB
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CEO Research Partner: Cognizant
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Save the Date for our Future Summits

- June 20, 2024 11am - 1pm ET via Zoom
- September 19, 2024 11am - 1pm ET via Zoom
- December 12, 2024 11am - 1pm ET via Zoom

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