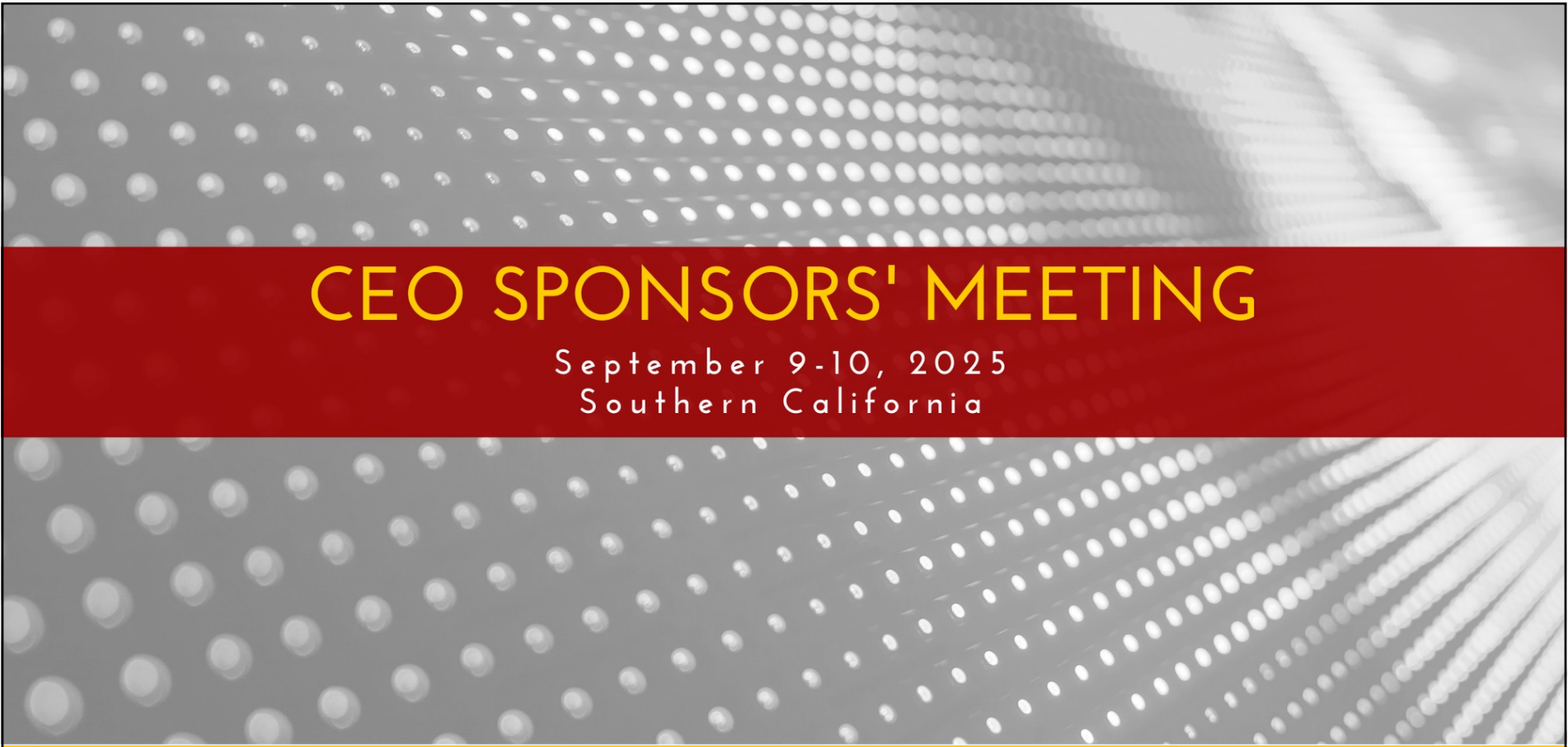
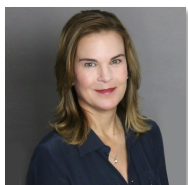




CEO SPONSORS' MEETING

September 9-10, 2025
Southern California

Today



Jennifer Sparks Taylor, EdD
Director, Corporate Relations

1:15 – 2:45 pm

The Effective Organization



Presenter:

Michael Beer, Cahners-Rabb Professor of Business Administration (Emeritus), Harvard Business School

2:45 – 3:15 pm

Break

3:15 – 4:30 pm

The Effective Organization: Lessons from the Field Panel Discussion

Moderator: Alec Levenson, Senior Research Scientist, CEO



Presenters:

Bernard Bedon, SVP, Chief Human Resources Officer, Levi Strauss & Co.
Susan Kelliher, Board Member, Compensation Committee Chair and CHRO Formerly The Chemours Company
Nerissa Morris, Chief People, Culture + External Relations Officer, Barton Malow Holdings

The presenters will share their experiences with establishing and maintaining effective organizations.

4:30 – 5:00 pm

Table Discussion - opportunities and challenges with building effective organizations

5:00 – 6:00 pm

Cocktail Reception (Immediately Following Meeting)

6:00 – 8:00 pm

Dinner

CEO Advisory Board



Bernard Bedon
*SVP, Chief Human
Resources Officer*
Levi Strauss & Co



Becky Boyd Hoover
*Vice President, Organization
Development*
Blue Shield of California



Kimberly Jones
*Managing Director, Talent
Strategy and People Experience*
PwC



Susan Kelliher
*Board Member, Compensation
Committee Chair and CHRO Formerly
The Chemours Company*
Sentima Advisors



Lilly Liang
Chief Talent Officer
Nike



Jeff Lindeman
*Chief People, Culture &
Capability Officer*
WD-40 Company



Omar Morales
*Head of Organization
Development*
Microsoft



Nerissa Morris
*Chief People, Culture &
External Relations Officer*
Barton Malow



Leslie O'Hara
Chief People Officer,
Foods
PepsiCo

CEO Research Scientists & Practitioners



John W. Boudreau
*Professor Emeritus and Senior
Research Scientist*



Jennifer J. Deal
Senior Research Scientist



Alexis Fink
*Senior Research Scientist, Former
VP, People Analytics & Workforce
Strategy, Meta*



Alec R. Levenson
Senior Research Scientist



Theresa M. Welbourne
*Affiliated Senior Research Scientist
Will and Maggie Brooke Professor in
Entrepreneurship and Executive
Director, The University of Alabama*



Sharna Wiblen
Senior Research Scientist



Christopher G. Worley
Affiliated Senior Research Scientist



Beth Gunderson
Affiliated Senior Practitioner



Liz Vales Damron
Affiliated Senior Practitioner



Maura Stevenson
Affiliated Senior Research Scientist

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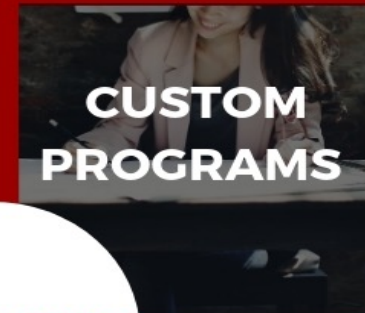
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Groups



Analytics &
Strategy
Execution



The Future of HR
and Work

Research & Practice Initiatives



1. AI Business Process Transformation Lab
2. Organization Design
3. Strategic Resource Groups
4. Future of Community

Research & Practice Initiatives

- 1. AI Business Process Transformation Lab**
2. Organization Design
3. Strategic Resource Groups
4. Future of Community



AI Business Process Transformation Lab

An action research and engagement call to action





AI Business Process Transformation Lab

Action Research & Working Group

Post-Hype Reality

After initial AI adoption surge, organizations face ROI concerns and adjustment challenges.

Competitive Advantage

Organizations that navigate this stage effectively will build durable competitive advantage.

Need for Collaboration

Real-world challenges require collective expertise from industry and research.

10 Non-Competitive Organizations





Why Participate

Research-Based Approach

USC Marshall Center for Effective Organizations brings cutting-edge expertise in technology adoption that maximizes integration and productivity. Direct interaction with leading research scientists, John Boudreau, Alec Levenson, Jennifer Deal, and Alexis Fink

Action Research Legacy

Structured similarly to successful workplace transformations like self-managing teams and the quality movement.

Accelerated Learning

Faster adoption through collaborative learning cycles, avoiding the typical decade-long adjustment period.





AI Business Process Transformation Lab

Action Research & Working Group

4

Quarterly Labs

Two-day in-person
experiences over one
year

8

Virtual Meetings+

Virtual sessions plus
organization-specific
coaching sessions

10

Organizations

Non-competitive
companies working
together with CEO
Research Scientists &
Practitioners



Science Led. Practical Results.



Alexis Fink, PhD

Decades of practice implementing new technologies and operating models (BASF, Intel, Microsoft, Meta)



Alec Levenson, PhD

Building organizational capability and systems diagnosis for AI transformation.



Jennifer J. Deal, PhD

Generational and power differences at work during technological disruption.



John Boudreau, PhD

Decades of Future of Work Research - designing work around tasks rather than traditional job structures.

Research & Practice Initiatives

1. AI Business Process Transformation Lab
- 2. Organization Design**
- 3. Strategic Resource Groups**
- 4. Future of Community**



Organization Design

Continuing to upskill talent for the future of work



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USCMarshall 17
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Custom, Public Workshops, & Community



Strategic Organization Design Workshop
@ Rennes School of Business, Paris, France
November 4 – 7, 2025



Strategic Organization Design Certificate Program
@ University of Southern California, Los Angeles
Part I: Strategic Org Design Workshop March 3 – 6, 2026
Part II: Strategic Org Design Activation Workshop May 19 – 21, 2026



Organization Design Community



Theresa Welbourne, PhD
Senior Affiliate Research Scientist,
Will and Maggie Brooke Professor
in Entrepreneurship and Executive
Director, The University of Alabama

Evolution of ERGs

*Building on 20 years of research to
continue to drive strategy and
innovation*

The Evolution of Employee Resource Groups

1. The Work of ERGs
2. Business Impact Study
3. Strategic Resource Groups
 - Developing standards
 - Collisions-based learning
 - Spread the values and knowledge
 - Strategic alignment
 - Cohort of 10 Organizations

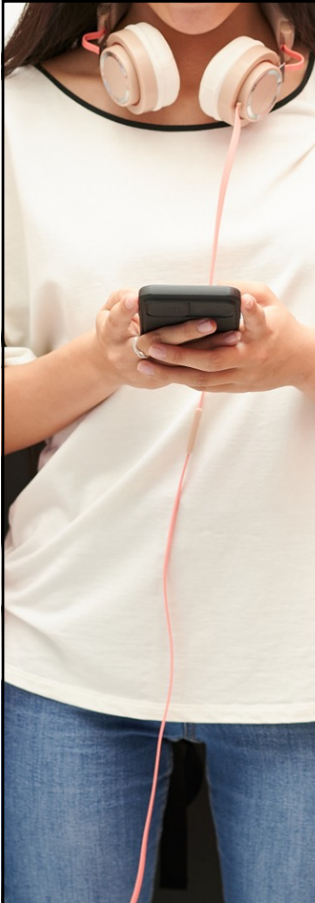




Jennifer J. Deal, PhD
Senior Research Scientist

Future of Community

Building on 20 years of generational research to solve for connection and purpose...impacting all organizations



Future of Community: Solving For Connection



The Problem: Face-to-face interaction has declined significantly, exacerbated by technology and the pandemic, and has not recovered. People need in-person connections and engagement to foster well-being. Loneliness results in poor health outcomes, reduced workplace productivity, and increased healthcare costs.

Who It Affects: Loneliness impacts all demographics, from children to the elderly. Young adults (12-28) are particularly vulnerable, and it affects their relationships, mental health, and future stability. Workplace loneliness leads to absenteeism, decreased productivity, and increased turnover.

Why It Matters:

- **Reduced GDP and economic growth:** Higher levels of disconnection are related to lower GDP growth.
- **Increased healthcare costs:** Loneliness is linked to a 29% increased risk of heart disease and a 32% increased risk of stroke.
- **Mental and physical health risks:** Chronic loneliness is as harmful as smoking **15 cigarettes a day**.
- **Workforce impact:** 73% of Gen Z and 65% of Millennials reported needing time off for stress and anxiety, often linked to loneliness.
- **Workplace absenteeism and disengagement:** Absenteeism due to loneliness cost employers over **\$150 billion** (2019).

Future of Community: Solving For Connection



Potential Partners

- Employers
- Researchers
- Health Organizations
- Government Agencies
- Community Initiatives

Our Focus: We aim to lower the barriers to social connection by making it easier for individuals to engage with others. Our initiative will focus on practical, scalable approaches to increase in-person interactions.

How:

- 1. Understanding Barriers**
Using a decision-function model to assess why people opt to stay in vs. go out.
- 2. Reducing Effort to Connect**
Developing low-friction, high-impact solutions to encourage in-person engagement.
- 3. Building Collaborative Solutions**
Bringing together experts, health professionals, businesses, and community leaders to co-create actionable strategies.

The Ask: We propose a multi-phase initiative:

- **Phase 1:** Expert Convening – Gather leaders and innovators for a 2-3 day working session to identify practical interventions
- **Phase 2:** Solution Development – Design and prototype high-potential interventions over 18 months.

Principles:

- Open access to all solutions developed
- No gatekeepers or restrictions on participation
- Link to educational resources for deeper engagement

..... **Funding Request:**

Initial funding need:
\$2M to support planning, convening, and early development efforts.

We invite mission-aligned partners to join us in creating sustainable solutions to combat loneliness and foster stronger, healthier communities.

Upcoming Events



- Sept 25 (Virtual) EEN Integrating AI & Psychometrics in Selection & Assessment Decisions
- Sept 25-26 (Virtual) Strategic ERG Leadership Summit
- Oct 23 (Virtual) EEN Structuring HR and Talent Processes for Organizational Effectiveness
- Oct & Nov (6 sessions Virtual) Driving Organizational Change with Data – in the Age of AI
- Nov 4-7 (Rennes - Paris) Strategic Organization Design Workshop
- Mar 3-6, 2026 (Los Angeles) Strategic Organization Design Workshop
- May 19-21, 2026 (Los Angeles) Strategic Organization Design Activation Workshop

<https://ceo.usc.edu/events/>



The Effective Organization

What is effectiveness, and how can it be developed?

Mike Beer, PhD

Cahners-Rabb Professor of
Business Administration (Emeritus),
Harvard Business School



Break



The Effective Organization: Lessons from the Field Panel Discussion



Alec R. Levenson

Senior Research Scientist
Center for Effective Organizations
Moderator



Bernard Bedon

*SVP, Chief Human
Resources Officer*
Levi Strauss & Co.



Susan Kelliher

*Board Member,
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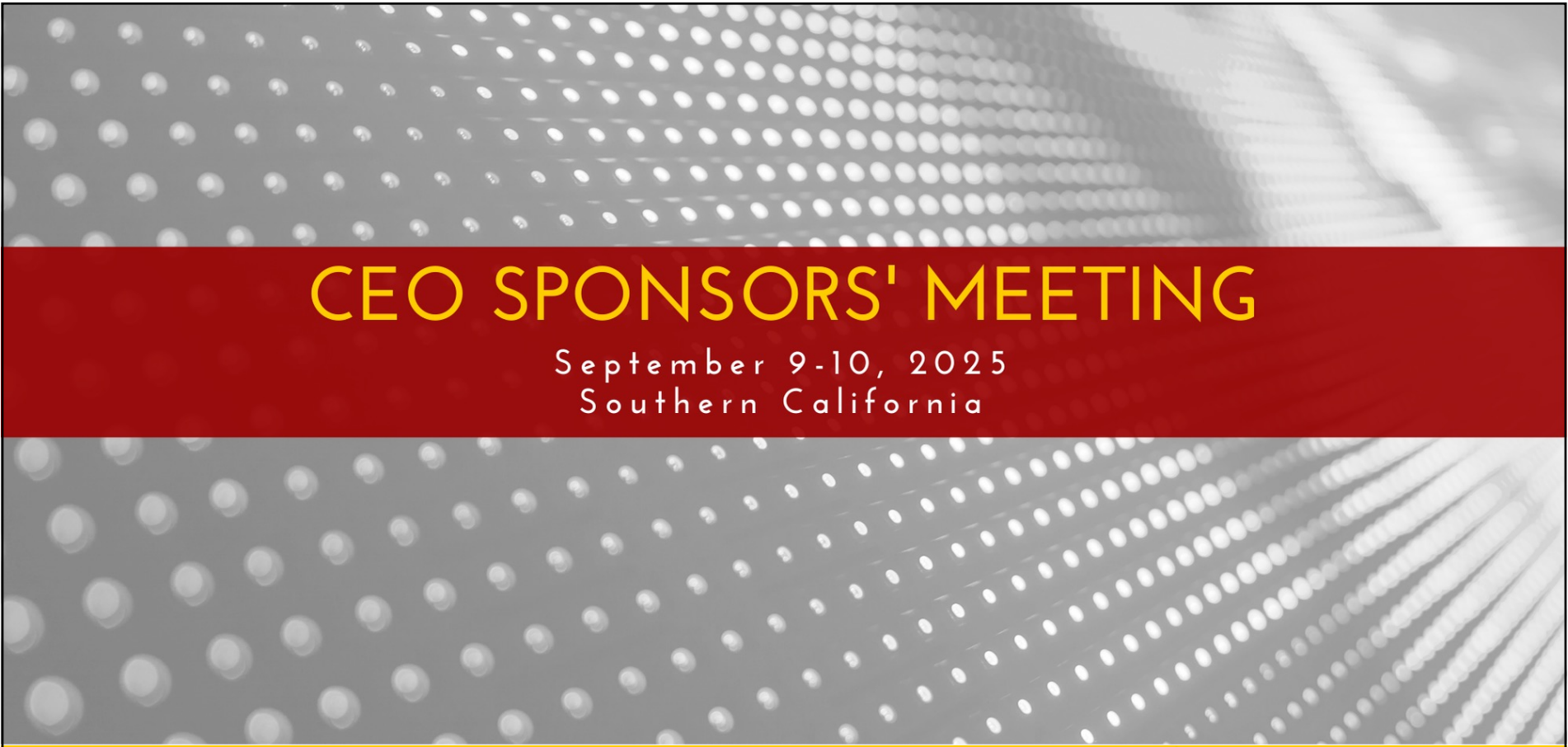


Reception & Dinner 5-8pm

Tomorrow: Breakfast 8am, Start 9am



Thank you.



CEO SPONSORS' MEETING

September 9-10, 2025
Southern California

Today

9:00 – 10:30 am **Connecting HR to Organizational Effectiveness: Leadership Platforms for Impact**



Presenters:

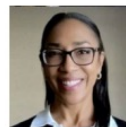
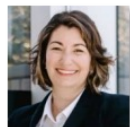
John Boudreau, Senior Research Scientist, CEO

Pete Ramstad, Strategy and Organizational Consultant, PMR Associates, LLC

10:30 – 10:45 am **Break**

10:45 – 12:15 pm **Synergizing Functions for Organizational Effectiveness Panel Discussion**

Moderator: *Sharna Wiblen, Senior Research Scientist, CEO*



Presenters:

Janet Sherlock, Former Chief Digital Officer, Ralph Lauren (the view from IT)

Kim Jones, Managing Director, Talent Strategy and People Experience PwC (the view from HR)

Alexis Fink, Senior Research Scientist, Former VP, People Analytics & Workforce Strategy, Meta

12:15 – 1:00 pm **Lunch**



Today



1:00 – 2:30 pm *A session with the Enterprise Effectiveness Network (EEN)*



Presenters:

Alec Levenson, Senior Research Scientist, CEO

Jennifer Deal, Senior Research Scientist, CEO

Sharna Wiblen, Senior Research Scientist, CEO

2:30 – 3:00 pm *Wrap Up Discussion*

Connecting HR to Organizational Effectiveness: Leadership Platforms for Impact



John W. Boudreau

*Professor Emeritus and Senior
Research Scientist
Center for Effective Organizations*



Pete Ramstad

*Strategy and Organizational
Consultant
PMR Associates, LLC*

Synergizing Functions for Organizational Effectiveness Panel Discussion



Sharna Wiblen

Senior Research Scientist
Center for Effective Organizations
Moderator



Janet Sherlock

Former Chief Digital Officer
Ralph Lauren



Kim Jones

*Managing Director, Talent
Strategy and People
Experience PwC*
PwC



Alexis Fink

Senior Research Scientist
*Former VP, People Analytics &
Workforce Strategy, Meta*
Center for Effective Organizations



Lunch

Session with the Enterprise Effectiveness Network (EEN)



Alec Levenson

Senior Research Scientist
Center for Effective Organizations



Jennifer Deal

Senior Research Scientist
Center for Effective Organizations



Sharna Wiblen

Senior Research Scientist
Center for Effective Organizations

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<https://ceo.usc.edu/events/>



Thank you.

Contact

Jennifer Sparks Taylor | 323.309.0039 | sparksj@marshall.usc.edu