

SAVCA-GIBS
Advanced Programme
in Private Equity

Value Addition
in Private Equity

1 November 2016
GIBS, Illovo, Johannesburg

SAVCA members: R4 000

Non-members: R4 400

(Excludes VAT)

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SAVCA-GIBS Advanced Programme in Private Equity

Value Addition in Private Equity

1 November 2016

08.15 - 08.30

WELCOME

Erika van der Merwe, CEO: SAVCA

FRAMING THE CONCEPT OF VALUE ADDITION

08.30 - 10.00

PRESENTATION: Value addition -- The essence of private equity

Richard Fienberg, Partner - Value Creation: Ethos Private Equity

Discussion topics:

- A framework for understanding and applying value addition
- The value addition life cycle
- Identifying value-unlocking opportunities during the due diligence process
- Setting up for success: Building alignment before signing the transaction into being

10.00 - 10.30

BREAK

APPROACHES TO STRATEGY, AND THE EXECUTION OF STRATEGY

10.30 - 11.15

PRESENTATION: Models for strategy development in private equity

Joao Rodrigues, Principal - Value Creation: Ethos Private Equity

Discussion topics:

- The art of finding value
- The role of strategy formulation in the value creation process
- Ensuring that value materialises

11.15 - 12.00

PRESENTATION: Models for executing the strategy - Perspectives from a management consultant

Andrei Vorobyov, Partner: Bain & Company

12.00 - 13.00

PANEL DISCUSSION: From Entrepreneurial to Professional - The strategic transformation of the organisation

Moderator: Catherine Townshend, CEO: Endeavor

Panellists:

David Cooke, Partner and Head of Southern Africa: Actis
 Jason Goldberg, Co-Founder: Edge Growth
 Siyabonga Nhlumayo, Partner: Medu Capital
 Samantha Pokroy, CEO: Sanari Capital

13.00 - 13.45

LUNCH

LEADERSHIP AND ITS ROLE IN ENABLING TRANSFORMATION

13.45 - 14.30

PRESENTATION: The theory of leadership

Per Lagerstrom, CEO: Sinequanon

14.30 - 14.45

CASE STUDY: Lessons from practice

Joaquín Schoch, CEO: Safripol

14.45 - 15.35

PANEL DISCUSSION: People, Processes and Practice - Leadership culture, and views on building healthy and productive teams within the portfolio company

Moderator: Nazeem Martin, Former MD: Business Partners Ltd - on sabbatical

Panellists:

Mohsin Cajee, Investment Principal - Private Equity: Old Mutual Alternative Investments
 Hans Kuipers, Partner and Managing Director: The Boston Consulting Group
 Lungile Mdluli, Director and Principal: Metier

15.35 - 16.00

CLOSING KEYNOTE PRESENTATION: Leadership in practice

Paul Edwards, Director: Emerging Markets Payments (EMP) Group

16.00 - 16.15

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Mohsin Cajee

Investment Principal - Private Equity: Old Mutual Alternative Investments (OMAI)

Education: BCompt; BCom (Hons); M.Com

Mohsin joined Old Mutual Private Equity in 2009. He is involved in originating, executing, managing and exiting investments across Old Mutual Private Equity's funds. He currently serves on the boards of Primedia, TiAuto Holdings and In2Food, as well as the Advisory Boards of CapitalWorks, Brait Fund IV and Vuwa Private Equity. Mohsin joined the Alternative Investments boutique in 2006 as Deputy to the CFO. Prior to this he worked as a Business Analyst in Old Mutual.



David Cooke

Partner and Head of Southern Africa: Actis

David had been working in European private equity for several years before he joined Actis in 2006. He spent three years at Ernst & Young's Private Equity Group in London, followed by two years at Bridgepoint Capital, but was looking to return to what he calls "an African context." Actis was the obvious choice, as a leading player.

David holds a social sciences bachelor's degree from the University of Cape Town and a postgraduate degree in business administration from the Wits Business School in South Africa. He is a CFA Charterholder.



Paul Edwards

Director: Emerging Markets Payments (EMP) Group

Paul is Director of Emerging Markets Payments (EMP) Group; Chairman of Equilibre Bio-energy Production and Integrated Pipeline Service (IPS). He was formerly Executive Chairman of EMP until the sale of EMP to Network International. Previous roles include: Chairman of Starcomms (Nigeria), Group CEO of MTN Ltd, Africa's largest cell phone operator; Group CEO of Johnnic Holdings Ltd; Chairman of Johnnic Communications Ltd; Founding President of Measat Broadcast Bhd (Malaysia), Executive Vice-President of Star TV in Hong Kong; Chief Executive of what is today called DST MultiChoice, Africa's leading satellite TV broadcaster; Chairman and CEO of ITC, South Africa's largest credit bureau and Head of Banking Software Solutions at Spenser Steward Advisory Services.



Richard Fienberg

Partner - Value Creation: Ethos Private Equity

Richard is responsible for ensuring operational performance at investee companies in order to enhance Value Creation across the portfolio. He has been instrumental in establishing a dedicated team of operating professionals and affirming Ethos' value-add capabilities.

Prior to joining Ethos Private Equity, Richard spent over 20 years at BP group, where he held several senior organisation leadership roles and directorships within the BP group of companies. During his time there, he performed numerous strategic roles at both company and industry level.

Richard holds a Bachelor of Science degree in Chemical Engineering from the University of Natal and an MBA from University of the Witwatersrand.



Jason Goldberg

Co-Founder: Edge Growth. Co-Founder: Vumela Fund. Founder: 10X-e

Education: B.Sc Elec Eng; B.Phil in Sustainable Development (both Cum Laude)

Jason started his career at Bain & Co. as a corporate strategist. Jason then founded Edge Growth to create jobs by building businesses. He has spent the last 10 years investing in, starting, scaling, and advising high-potential ventures. Edge now has cR700m capital under management and works with 50-100 early stage venture teams at any time.

Recently, Jason launched 10X-e to help Founders navigate the most complex stage of building a business: transitioning from a successful start-up to a scaled enterprise. Jason intends to industrialise the Scale Up process by democratising Scale Up know-how and toolkits.



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Hans Kuipers

Partner and Managing Director: The Boston Consulting Group

Hans is a Partner in the Johannesburg office. He joined BCG in 2011 and leads BCG's South African Technology, Media and Telecom (TMT) practice and is the node for strategy and Private Equity in South Africa. Hans has extensive global experience working with multi-nationals and PE firms working on M&A, strategy, operations and innovation topics.

Prior to joining BCG Hans was a partner in Accenture in Amsterdam where he was responsible for all Telecom, Media, Entertainment and Technology Industry related management consulting projects. Hans holds advanced degrees in both Chemistry and Economics from the University of Groningen, the Netherlands.



Per Lagerstrom

CEO: Sinequanon

Per is the CEO and co-founder of UK based Sinequanon. They have developed and proven a unique data driven method to activate the performance potential of people and leaders. See www.sqnway.com. He is also an independent non-executive director at Rand Merchant Bank Holdings and Rand Merchant Insurance Holdings, South Africa's pre-eminent financial services group.

His drive for innovation around people analytics led him to founding Sinequanon in 2015 after fifteen years as a partner McKinsey, where he leads the financial services and organization practices.



Nazeem Martin

Former MD: Business Partners Ltd - on sabbatical

Nazeem is a founding member and Chairman of the Wallflower Group – a business started in August 2016 with interests in real estate, food/aquaculture, healthcare, education sectors and SME consulting sectors.

He is the former Managing Director of Business Partners Limited ("BPL") – a South African-based, on-scale provider of risk capital, technical assistance and real estate solutions for SMEs. He was also the CEO of Business Partners International (Pty) Ltd, the subsidiary through which BPL conducts business in Africa and elsewhere. Nazeem held both positions from 1 January 2009 to 31 March 2016.

Prior to joining Business Partners in 1998, Nazeem held senior positions in the private, public and NGO sectors.

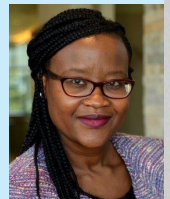


Lungile Mdluli

Director and Principal: Metier

Lungile Mdluli completed her under- and postgraduate degrees in accounting and commerce at the Universities of Natal and Johannesburg. She served articles at KPMG in Johannesburg where she qualified as a chartered accountant in 2000. On completion of her articles, Lungile joined WipCapital, a subsidiary of Wiphold as a manager in the Debt Products team. She joined De Beers in 2002 as a project accountant in the Group Exploration Finance department, before moving to its Corporate Finance department.

Lungile joined the Metier team in 2005 as a key investment transaction executive for the first Capital Growth Fund, where she has been integrally involved in evaluating transaction opportunities, fund raising and management of the investment in Libstar and its expansion projects and acquisitions. Lungile is a principal in the private equity team and is a director of Metier.



Siyabonga Nhlumayo

Partner: Medu Capital

Siyabonga is partner at Medu Capital, a black owned Private Equity firm. He is responsible for strategic development, investment execution and management. He sits on various Medu Capital portfolio company boards and sub-committees. He is also a board member and treasurer of the South African Venture Capital & Private Equity Association (SAVCA).

Prior to joining Medu Capital in 2007, Siyabonga spent two and half years at PricewaterhouseCoopers' Transaction Services advising on a range of transactions. Siya commenced his career at PricewaterhouseCoopers where he qualified as a Chartered Accountant.



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Samantha Pokroy CEO: Sanari Capital

Samantha is the founder and CEO of Sanari Capital, a private equity firm specialising in founder-run, owner-managed and family-owned businesses in the lower-middle market. Samantha has twelve years of private equity and venture capital experience in SA and US markets. She played a leading role in investments at Ethos Private Equity, which she joined in 2006. Previously, Samantha worked at a Chicago-based private equity firm and in investment banking and consulting in New York. Samantha holds an MBA (Chicago Booth), BCom (Wits), BA Hons (Industrial Psychology) (Wits) and CFA. She is a director on the board of SAVCA.



Joao Rodrigues Principal - Value Creation: Ethos Private Equity

Joao joined Ethos in July 2014 and specialises in our Value Add discipline. Drawing on his extensive experience as a management consultant, he works with our portfolio companies and investment teams to shape value creation strategies, drive operational performance and support portfolio companies to achieve full potential. He currently serves on the Boards of Busby and Eazi Access.

Joao joined Ethos from McKinsey & Co, and has significant functional experience in operational improvements, corporate turnarounds and capital project design and delivery. Joao holds a Bachelor of Science in Engineering (Electronic) (Summa Cum Laude) from the University of Natal, and an MBA (with distinction) from INSEAD.



Catherine Townshend MD: Endeavor South Africa

As MD of Endeavor SA, Catherine supports some of the country's most innovative, high-impact entrepreneurs in achieving their highest growth potential. Catherine has a BSc and a Postgraduate Diploma in Enterprise Development from Rhodes, and has a background in corporate finance and the financial services sector. In 2013 she became the first South African to graduate a Kauffman Fellows (class 18) and has completed leadership programmes at GE Ventures and Stanford University.

Outside of work, she's represented South Africa at the UCI Mountain Bike World Championships, achieving a world ranking of 5 in her age category in 2008 and 2010.

Endeavor is leading the high-impact entrepreneurship movement around the world.



Andrei Vorobyov Partner: Bain & Company

Andrei Vorobyov is a partner in Bain & Company's Johannesburg office, where he leads the Private Equity and Mergers & Acquisition practices in Africa. Andrei has led more than 30 commercial due diligences in over 10 African markets. He has also helped several PE funds develop their fund strategy and worked with multiple PE portfolio companies on strategy development and performance improvement. Andrei has also led several significant corporate M&A efforts from diligence to post-deal integration.

He holds an MBA with high honours from the University of Chicago GSB and an MS in Computer Science from Northern Illinois University.



Joaquín Schoch CEO: Safripol

