



Executive Roundtable Series: LEADING TRANSFORMATION

Building resilient leaders who can navigate change, disruption, crisis, and continuous transformation

A curated series of exclusive roundtables

12

CPD HOURS

For senior leaders, and those preparing to step into leadership roles that require change management

DISCOUNT PRICING
BEFORE 17 JULY

4 HALF-DAY SESSIONS

From September to November 2026

9 am to 12 pm each day - Auckland





Executive Roundtable Series: Leading Transformation



ABOUT

This series of executive roundtables provides exclusive and indepth access to New Zealand's experts and leaders of change.

Leading Transformation is a premium executive roundtable series designed to equip senior leaders with the mindset, tools, and confidence to lead through complexity, ambiguity, and disruption.

Across four highly interactive, half-day sessions, you'll join a curated group of peers for candid, insight-rich discussions with some of New Zealand's most respected business leaders. Each session tackles a critical dimension of modern leadership - from digital transformation and cyber risk to operational resilience and value creation - grounded in real-world experience, not theory.

More than a learning programme, this is a trusted leadership forum. In an intimate setting, you'll exchange perspectives, challenge thinking, and build meaningful connections with leaders facing similar pressures and opportunities.

You'll leave with:

- Practical strategies to lead teams through ongoing change and uncertainty
- Greater confidence in balancing transformation with business-as-usual performance
- Enhanced resilience - for yourself, your teams, and your organisation
- A powerful network of peers to support your leadership journey

If you're leading - or preparing to lead - through change, this series will strengthen your ability to act decisively, adapt quickly, and lead with impact.

PLACES ARE LIMITED

- Places are **limited to 12 - 15 seats** per roundtable session.
- Registrations are limited to a maximum of two people from the same company per roundtable

WHO SHOULD ATTEND

Senior leaders, and those preparing to step into leadership roles that require change management

FORMAT

A 4-part series of half-day roundtables from mid September until November

DATES & TIMES

9am to 12noon:

Wednesday 16 September 2026

Tuesday 22 September 2026

Wednesday 21 October 2026

Wednesday 4 November - 2026

SPEAKERS

A senior keynote will present on a specific topic linked to transformation, speaking to a small group of 12-15 executives, allowing for more in-depth discussion and building an alumnus amongst the participants.

Executive Roundtable Series: Leading Transformation



PROGRAMME

DAY 1
Wed 16 Sept

Building Competency as a Senior Leader and Bench Strength of the Organisation

GUEST SPEAKER

SIMON MONKS - PREVIOUSLY MANAGING PARTNER CALDWELL/JOHNSON PARTNERS

An executive-level session designed to strengthen senior leadership capability while intentionally developing a robust leadership bench to ensure the organisation's long-term resilience, performance, and succession readiness.

Project Governance and Execution

GUEST SPEAKER

CATHERINE FLETCHER - PARTNER, MOSAIC FINANCIAL SERVICES

A practical leadership session focused on strengthening project governance and execution by effectively implementing new systems, streamlining processes, and ensuring the timely, high-quality delivery of strategic projects.

DAY 2
Tues 22 Sept

Purpose and Leading People Through Rapid Change

GUEST SPEAKER

DAVID MAIR - MANAGING DIRECTOR, SANFORD

A first-hand leadership perspective on turnaround and growth from former Managing Director of Skellerup, sharing insights on leading people through a disciplined approach. Purpose for any organisation followed by true customer focus to drive productivity and improve (and share) long-term performance.

Changing the Business Model

GUEST SPEAKER

SPEAKER TO BE ADVISED

A strategic leadership session on reinventing the business model, focused on how organisations adapt to changing market dynamics, emerging technologies, and customer expectations. The session explores practical approaches to redesigning value propositions, unlocking new revenue streams, and leading transformation with clarity and confidence.

DAY 3
Wed 21 Oct

Digital Strategy

GUEST SPEAKER

BLAIR TURNBULL - CEO, MILFORD ASSET MANAGEMENT

A candid session with Blair Turnbull, CEO of Milford Asset Management, drawing on his experience leading Tower and UK Head of Digital and Retail for giant Aviva to explore how leaders can shape digital strategy - why it matters, what good looks like, and how to lead digital change with confidence and clarity.

Cyber and IT Risk Management

GUEST SPEAKER

MARK PETERSON - FORMER CEO, NZX

A high-impact executive conversation with Mark Peterson, reflecting on his leadership experience at NZX to examine cyber and IT risk management, why it is a critical board and executive priority, and how leaders can strengthen resilience, governance, and decision-making in an increasingly complex digital risk landscape.

DAY 4
4 November

Adaptive Strategy

GUEST SPEAKER

STEVEN MCCRONE - MANAGING DIRECTOR AGLX ASIA-PACIFIC

A session on leading strategy in complex, changing environments. Drawing on work with finance organisations, including NZ Guardians, Steve explores why traditional planning falls short in high-stakes settings and introduces Adaptive Strategy, a framework grounded in complexity theory that helps leaders make decisions, build shared understanding, and act when the path forward isn't clear.

Creating Value in Investee Companies

GUEST SPEAKER

HEATH KERR - MANAGING PARTNER, DIRECT CAPITAL

A strategic session on value creation by private equity in investee companies, focused on creating value through M&A, exploring how leaders identify the right opportunities, execute disciplined transactions, and realise post-merger value through integration, governance, and strategic alignment.

SPEAKERS



SIMON MONKS
Previously Managing Partner
CALDWELL/JOHNSON PARTNERS

DAY 1:
Building Competency
Wed 16 September



CATHERINE FLETCHER
Partner
MOSAIC FINANCIAL SERVICES

DAY 1:
Project Governance & Execution
Wed 16 September



DAVID MAIR
Managing Director
SANFORD

DAY 2:
Operational Excellence through Kaizen
Tues 22 September



BLAIR TURNBULL
CEO
MILFORD ASSET MANAGEMENT

DAY 3:
Digital Strategy
Wed 21 October



MARK PETERSON
Former CEO
NZX

DAY 3:
Cyber & IT Risk Management
Wed 21 October



STEVEN MCCRONE
Managing Director
AGLX ASIA PACIFIC

DAY 4:
Adaptive Strategy
Wed 4 November



HEATH KERR
Managing Partner
DIRECT CAPITAL

DAY 4:
Creating Value in Investee Companies
Wed 4 November

Executive Roundtable Series: Leading Transformation

FORMAT & DATES

A 4-part series of half-day roundtables from 9am to 12noon: from mid September until November.

- Wednesday 16 September 2026
- Tuesday 22 September 2026
- Wednesday 21 October 2026
- Wednesday 4 November 2026

VENUE

Russell McVeagh, Level 30, Vero Centre,
48 Shortland Street, Auckland CBD

PREREQUISITES

- Established leadership experience
- For senior leaders, and those preparing to step into leadership roles that require change management
- Strong business and commercial acumen
- Active participation mindset

HOW TO REGISTER

- Register online or contact Faith Taylor on faith@infinz.com
- Places are limited to 12 - 15 seats per roundtable session and limited to a maximum of two people from the same company per roundtable

CPD HOURS

- 12 hours

DISCOUNT PRICING
BEFORE 17 JULY

COSTS FOR THE SERIES

INFINZ Members - \$999 + GST
Non-Members - \$1299 + GST

AFTER 17 JULY PRICING:

INFINZ Members - \$1100 + GST
Non-Members - \$1400 + GST

10% Discount for Next Director Alumni (where current financial members). Maximum of two registrants from the same organisation.

Includes morning tea and refreshments.