

ARMSTRONG WOLFE™

Women in the COO Community (**WCOOC**) Virtual Forum

# Do's and Don'ts of Inclusive Leadership

## EMEA / NA

**Thursday 26th May 2022**

**17.00 - 18.15 BST / 12.00 - 13.15 EDT**



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Women in the COO Community

# Agenda

- »» **Live Examples** of Do's and Don'ts of Inclusivity
- »» **Interrupting the Bias** and Speaking Up
- »» **Cultivating** a Psychological Safe Space in the Workplace
- »» **Evolving** a Culture of Inclusion



# Panel



**Toni Cortese**

Ex-Barclays Director, and current President,  
Force 9 Coaching

Toni Cortese is an Executive Leadership Coach who is passionate about developing leaders through greatness of character. Her coaching has helped leaders achieve their professional goals while driving engaged teams to impact the bottom line. Prior to coaching, Toni led global technology teams during her 25-year tenure in investment banking.

Having globally managed engineers for most of her career, Toni is especially adept at and sensitive to the challenges faced by senior technologists and other analytical professionals. She has coached technologists at Google and many mid-size and small technology firms. Toni also works with senior leaders at several Wall Street firms.

Toni is an avid supporter of diversity which won her the honor of ringing the opening and closing bells at the NYSE and NASDAQ.



**Lori Messer**

Global Head, Business & Client Services  
RBC Capital Markets

Lori Messer is Managing Director and Global Head of RBC Capital Markets Business & Client Services. In this role, Lori is responsible for leading a global team that focuses on driving operational fluency across all businesses and the overall client transaction experience. Her versatile skills and inclusive leadership style are evidenced by senior roles held across multiple geographies and businesses.

Throughout her tenor at RBC, Lori has held several senior roles across offices in Toronto, London (UK) and New York. Most recently, she was the Chief Operating Officer, Global Equities where she was accountable for leading the business management, client strategy and technology strategy teams for the Global Equities and Research franchise. Prior to joining RBC, Lori lived in Buenos Aires, Argentina while working as a Client Relationship Manager for a Canadian pharmaceutical software development firm. She holds a Bachelor of Commerce (Hons) from Saint Mary's University and an International Masters of Business Administration from the University of Ottawa.

Lori is passionate about and active in partnering with many community organizations. Within RBC CM, she is an Advisor for the RBC Academy, was a member of the US Diversity Leadership Council, co-founder of the Canadian Corporate Citizenship Forum, and former Employee Chair of the Canadian Employee Giving Campaign. Externally, she is Vice-Chair of the Board of Directors and Chair of the Board Quality Committee of Youthdale Treatment Services, which focuses on youth mental health and is involved as a supporter of several other community agencies, public schools and programs.

# Panel



**Jeff Rosen**

**Managing Director & COO, Americas Global Markets  
Société Générale**

Currently, Jeffrey Rosen is a Managing Director and Chief Operating Officer of Société Générale's Global Markets business in the Americas.

Jeff leads the Equity and Fixed Income Business Management functions, as well as the transversal Global Markets Project Management, Regulatory, Operational Risk and Control teams in the Americas. In addition, Jeff is responsible for SG's Strategic Investments in US, as well as several business development initiatives.

Jeff joined Société Générale in 2010, prior to his current role he held several different roles which included leading the Global Dodd-Frank Act implementation for the markets businesses, heading the Americas-based Project Management team, and most recently, Deputy COO of Global Markets in the Americas. Prior to Société Générale, Jeff spent fifteen years at Morgan Stanley in a variety of roles.

Jeff has a BS in Mechanical Engineering from Union College in Schenectady, NY, an MBA and an MS from Columbia University in New York, NY.



**Ron Taylor**

**Executive Vice President, US Head of Diversity, Equity and Inclusion,  
Natixis Investment Managers**

Ron Taylor currently serves as Natixis Investment Managers Executive Vice President and Head of Diversity, Equity and Inclusion (DEI) in the US, based in Boston. In this role, Taylor leads Natixis IM's US DEI initiatives and also serves as a resource for Natixis IM's affiliates in the region to support their DEI efforts. He reports to David Giunta, CEO of Natixis Investment Managers in the US, and was appointed to the US Executive Committee.

Taylor has 20 years of experience leading DEI programs, primarily in the financial services industry. He joined Natixis IM from Mizuho Americas, where he served as Managing Director, Head of Diversity and Inclusion. Prior to that, Taylor held a similar position at Federal Reserve Bank of New York. He served as a diversity consultant to EisnerAmper, the Food Bank for New York City, and the American Institute of Certified Public Accountants and held diversity leadership roles at Deutsche Bank, Eisner, and KPMG.

Taylor currently serves as Chair of Genesys Works NYC, an organization focused on matching high school seniors to internship opportunities in financial services, and is a member of the Board of Advisors for Bronx Community College's Business and Technology School. He is a Lifetime Member of the National Association of Black Accountants and a past recipient of the Michigan Association of CPAs Diversity Award. Taylor also served on Harlem's Board of Directors for Major League Baseball's Reviving Baseball in Inner Cities program and St. Anthony High School's Board of Trustees.

# Panel



**Deborah Womack**  
Associate Partner, EY

Deborah Womack is an award-winning marketing leader and Associate Partner at Ernst & Young LLP, having previously held leadership roles in consulting, industry, and digital agencies. Deborah leads on marketing transformation within EY's business design consulting practice and works across the financial services industry in Banking, Wealth and Asset Management, Insurance and FinTech. She acts as a trusted advisor, helping senior marketers and executives transform their marketing programmes into growth engines that deliver mutual value to customers and the business.

Deborah serves as a board trustee at the RNIB (Royal National Institute of Blind people) and is a founding member and advisor for BRiM (Black Representation in Marketing), a cross-industry initiative created to improve the representation of Black people in marketing by providing actionable advice to support all marketers at all levels from clients to agencies and consultancies.

Deborah has 25+ years' strategic and operational experience successfully leading the transformation of marketing, digital and data functions into data-driven, customer-focused organisations. Programs Deborah has led, have generated more than 750 million of members worldwide, facilitating billions of conversations relevant to some of the world's leading brands.



**Wade Younger**  
WCOOC Ambassador and Managing Partner, Armstrong Wolfe Advisory

Wade offers over 30 years of experience in technology, organizational development and process improvement as the former CEO of Fruition Consulting and The Value Wave. He is the author of over 40 books and has given over 1,800 talks and lectures since 1990. Wade has made personal and organizational wellness his life's work.

Wade believes one must have visions of a healthy; high-performance organization is embodied in the Company-Within-an-Organization archetype. Wade says, "Every department; indeed every small group, should view itself as an entrepreneurial business because clearly, when everyone is focused on producing their products and services, they will view peers as customers and suppliers and the impact of this archetype will be profound".

He is an accredited project and program manager with experience developing solutions and managing implementation, methodologies, execution requirements enterprise deployment plans, project strategies and quality assurance.



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# Moderator



**Gwen Wilcox,**  
COO and Global Head of WCOOC, Armstrong Wolfe

Gwen is the Chief Operating Officer of Armstrong Wolfe. She manages the global team responsible for leading industry peer to peer engagements for the International COO Community, using deep domain expertise in Business Management, Marketing, Sales and Partner Relationship Management.

Gwen has successfully progressed her career to the intersection of financial services and technology. She brings 20 years of experience in Financial Services and Engineering. She began her career in marketing and partnerships at Lehman Brothers and Barclays Wealth Management before transitioning to a career in Commodities and Technology. Gwen has a master's degree in Business & Management from Westminster University, London.

Gwen leads the Diversity & Inclusion initiative for the firm supporting core pillars of the cultural transformation programmes underway in Financial Services.



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# About WCOOC and Our Purpose

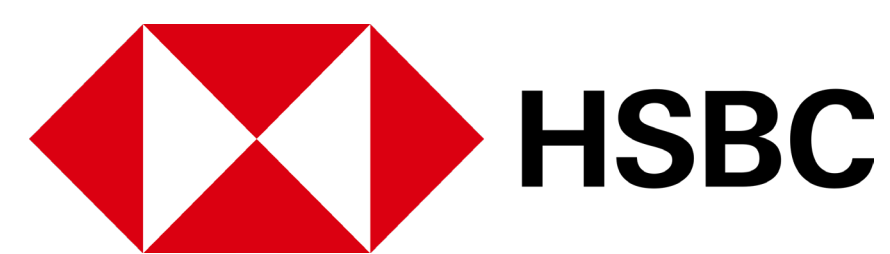
Our purpose is to **support all talents** in Financial Services in the COO function.

We are passionate about including men and women, **at all levels** of seniority, to create equitable opportunities **for all**.



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# WCOOC Steering Committee



**Suzy White,**  
Global COO Markets &  
Securities Services, HSBC



**Pascale Moreau**  
Global COO of Markets, Business,  
Transformation & Oversight,  
Societe Generale



**Penny Tunbridge**  
Head of Chairman's  
Office, Credit Suisse



**Sietske Kalse**  
Managing Director, COO and Head  
of Business Development, Citi



**Gordon Grant**  
Global Head of Futures,  
Clearing and FX Prime  
Brokerage Operations, Citi



**John Currie**  
Chief Operating  
Officer, Asia Pacific,  
Scotiabank



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# WCOOC Ambassadors



**Erica Benjamin**

Global Head of Wealth Operations,  
Bank of Montreal

**JPMORGAN  
CHASE & CO.**

**Kimberly Ong**

EMEA and Asia COO Asset  
Management Solutions,  
J.P. Morgan Asset Management

**NOMURA**

**Jason Brus**

Global Chief of Staff,  
Equities, Nomura



**John Currie**

Chief Operating  
Officer, Asia Pacific, Scotiabank



**Gordon Grant**

Global Head of Futures,  
Clearing and FX Prime  
Brokerage Operations, Citi



**Jo Norena**

COO, Builder AI



**Helen Hughes-Green**

Managing Director,  
Citi ICG Business Controls



**Piers Murray**

Co-Managing Partner,  
Armstrong Wolfe Advisory



**Rich Evans**

Head of Prime,  
CEX.IO



**Fatema Bookwala**

Managing Director, COO  
Markets and Securities  
Services, HSBC



**David Ornstein**

COO, Baton Systems



**Alexandra Stanton**

AVS Corporate  
Culture Consultancy



**Ronald Taylor**

Executive Vice President, US Head  
of Diversity, Equity and Inclusion,  
Natixis Investment Managers



**Wade Younger**

Co-Managing Partner,  
Armstrong Wolfe Advisory



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# Executive Topics Covered

- Essential Coaching Techniques to Become a More Effective Leader
- The Changing Landscapes of ESG and Crisis Management
- How to Build Powerful Brand in Order to Advance Your Career
- Your Network is your Net Worth
- Artificial intelligence: AI and the Workforce
- Cloud Outsourcing: Cloud Strategy
- Talent: War on Talent & Workforce planning
- Managed Services - Trends, Successes and Challenges
- What Makes the Ideal Use Case for Industry Collaboration
- Operational Resilience
- Women in Innovation in the Operating Model
- Diversity and Inclusion Roles Supporting Faster Innovation
- Investment in Technology for Operational Improvement
- Cost saving and Revenue Generation
- Front to Back Regulatory Change, Handling and Embeddedness
- Green and Sustainability Initiatives: Financial Services and Sustainability; where we are today?
- Emerging business Initiatives; Sustainability as a Business Opportunity
- Operational and Technology Initiatives; Creating a Sustainable Business
- Climate and Sustainability Risks; Transforming Risk Management Frameworks
- Contract Digitization
- Workplace and Workforce Transformation
- Outsourcing & Managed Services
- Strategies to Minimize Gender Divide
- If You Want to Change the World, Change the Way Capital Flows
- Why Being Menopause Supportive is Business Savvy
- Mentoring as a Tool for Career Development and Retention of Female Talent
- Embedding Conduct and Culture in the Everyday Life of an Organisation (Hong Kong)
- A panel discussion investigating individual career journeys to becoming a COO, thoughts on the role and its mandate, what makes a good COO (Hong Kong)
- Culture and Conduct - Our Impact and Influence (Singapore)
- Workforce Re-entry Initiatives (Singapore)



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# Quotes from our WCOOC Ambassadors

The role of the COO has been my most challenging and at the same time most rewarding of my career to date. Being an ambassador for Women in the COO Community allows me to support others and share my experiences in what is an often misunderstood role with few experienced resources to lean on. **Rich Evans**

I am delighted to be joining Women in the COO Community (WCOOC) as an ambassador. While there is still a shortage of women in the COO space, WCOOC proves everyday that they are more than prepared to address the challenges facing all industries today. I had to get behind this initiative, to champion and promote this talent pool. It has been my pleasure to speak to and work with members of WCOOC. I always walk away with more insight than I came with. **Wade Younger**

Being equally able and allowed to develop ones full potential in the workplace should not be a topic of discussion anymore in this day and age. Unfortunately it still is. Creating and supporting avenues that enable the right environment to ensure everyone has access to equal opportunities remains urgent and important. As a woman with a career in Finance, I know it is not a given for everyone to break or confront barriers in adverse environments. I have seen firsthand how WCOOC is paving the way and supporting talented women in our industry across all walks of life. I am extremely honoured and proud to be able to contribute as a steering Committee Member. **Sietske Kalse**

I refuse to believe that women do not have the potential to achieve success at the highest levels of business given their proven academic achievements and business contributions and yet, we continue to see the gender gap persisting. Our customers, shareholders and communities are being failed because businesses are not tapping into the full, representative talent pool available to them, being unconsciously (or consciously) trapped by biases and held back by the legacy overhang of accepted practices.

I've been an active member of the Armstrong Wolfe WCOOC for a number of years and love how it brings individuals together, agnostic of organisation and geography, to collaborate, challenge accepted norms and share best practice with the common aim of improving diversity and inclusion and, in doing so, improving the outcomes for our clients, our shareholders and our communities as a whole. I am very grateful for the opportunity to contribute more actively as a WCOOC Ambassador moving forward. **Helen Hughes-Green**

The COO role covers a wide range of responsibilities and a unique set of challenges. It is so important and invaluable to have a community like WCOOC that supports us to deliver and develop both professionally and personally. **Kimberly Ong**

I have found WCOOC as a great platform that provides COOs with an opportunity to network, learn, contribute and stay engaged on very relevant topics. **Fatema Bookwala**

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# Thank you



## Gwen Wilcox

COO and Global Head of WCOOC, Armstrong Wolfe

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