



IRI 2026

# INNOVATORS SUMMIT

May 6-8 / Charlotte, NC



# CTO Forum

**Lee Green**

Executive Director, *IRI*

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**Denny Ard**

Partner/National Director of Innovation  
*Forvis Mazars*

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# CTO Forum Co-chairs

**Julie Edgar**

Senior Vice President, Chief Technology Officer  
*The Lubrizol Corporation*

**Arthur Martin**

Vice President of Research & Development in North America  
*Arkema, Inc.*

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# Designing a Future-Ready Global Capability Footprint

**Julie Edgar**

Senior Vice President, Chief Technology Officer  
*The Lubrizol Corporation*

**Arthur Martin**

Vice President of Research & Development in North America  
*Arkema, Inc.*

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# The Scenario

You lead global R&D for a large industrial company. A high-growth market (batteries, data centers, advanced materials) is accelerating in one region—but your critical R&D capabilities sit elsewhere.

## PRESSURES YOU FACE

- ▶ Strong market & customer pull
- ▶ Talent availability & cost pressure
- ▶ Rising geopolitical risk

## CONSTRAINTS

- ▶ Show meaningful progress in 3 months
- ▶ Expected to be “digital-first”
- ▶ No ability to add net resources

**THE CHALLENGE:** How do you rebalance global R&D capabilities to drive speed, agility, and productivity—without undermining the core?

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# Group Discussion & Report Out

## DISCUSSION QUESTIONS

Each group acts as the R&D leadership team and works through these questions:

- 1. Where should global R&D capabilities be located going forward—and why?**
  - What moves closer to the market?
  - What explicitly does not move?
  - What gets reconfigured instead of expanded?
- 2. What organizational changes are needed to make this work?**
  - Leadership behaviors under uncertainty
  - Knowledge continuity and succession as capabilities shift
  - Role of customers, partners, and co-innovation
- 3. What are the most meaningful digital investments as global R&D capabilities shift?**

## REPORT OUT

Each group shares 2–3 bullets:

- ▶ **One hard or uncomfortable decision**  
A trade-off or tough call your team would make
- ▶ **One organizational change required**  
Structure, roles, or governance that must shift
- ▶ **One practical digital investment**  
A specific tool or platform to enable the shift



# Featured Speaker

**Joe Allen**

Executive Director

*The Bayh-Dole Coalition*

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# CTO Curated Dialogue

**William A. Singleton III**

Executive Director, Global Packaging Innovation & Sustainability

*Mars*

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# Next CTO Forum: December 4 in Orlando

*Immediately following Innovating  
the Future, Dec. 2 - 3*



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