

# Friday, August 10<sup>th</sup> – 2018 Lean Systems Summit

The *Lean Systems Summit* highlights Keynote Speakers and 15 learning sessions across healthcare, services, manufacturing, government, and other sectors on how Lean leaders and practitioners are using Lean continuous improvement to change their culture, improve their way of doing business, and not only survive but thrive.

7:00AM-8:00AM	<b>Registration, Networking, Continental Breakfast</b>				
:00AM-8:15AM	<b>Welcome: Anne Frewin</b> , Senior Lean Operations Manager, IDEXX Laboratories				
8:15AM-9:00AM	<b>Opening Keynote: Raye Wentworth</b> , Plant General Manager, New Balance Athletics				
9:00AM-9:15AM	<b>Transition to Learning Sessions</b>				
Room	Cumberland	York	Kennebec-Lincoln	Oxford	Somerset
9:15AM-10:30AM	<b>A1: Improving Organizational Performance and Engaging Your Workforce through Strategy Deployment</b>	<b>A2: The Real Cost of Poor Quality – It's more than rework and scrap</b>	<b>A3: Creating Lean Leaders in a Virtual Environment: The Work of One Wide-Spread Federal Agency</b>	<b>A4: Underwater or staying afloat? How to Engage a Drowning Team</b>	<b>A5: LEAN – It's for Everyone</b>
10:30AM-10:45AM	<b>Break - Change Learning Sessions</b>				
10:45AM-Noon	<b>B1: Engage your nonproduction employees in your continuous improvement journey</b>	<b>B2: Managing People in a Lean Transformation</b>	<b>B3: Building a Psychologically Safe Environment that Promotes Learning &amp; Productivity</b>	<b>B4: Joy at Work: Energize Your Engagement in Operational Excellence!</b>	<b>B5: Developing a Lean Culture</b>
Noon-1:00PM	<b>Lunch (provided)</b>				
1:00PM-1:45PM	<b>Afternoon Keynote: Ron Pereira</b> , Co-Founder & President, Gemba Academy				
1:45PM-2:00PM	<b>Break - Transition to Learning Sessions</b>				
2:00PM-3:15PM	<b>C1: Seven Steps to Organizational Zen</b>	<b>C2: Value Stream Mapping for the Office</b>	<b>C3: Lean System for Managing – The glue that holds it all together</b>	<b>C4: Advancing Healthcare Value through Optimized Inventory and Supply Management</b>	<b>C5: Breaking Through Conceptual Blind Spots to Process Improvement</b>
3:15PM-3:30PM	<b>Break - Refreshments</b>				
3:30PM-4:15PM	<b>Closing Keynote: Kevin Hancock</b> , President & CEO, Hancock Lumber				
4:15PM-4:30PM	<b>Wrap-Up -- Next Steps</b>				
<i>See you again next year on August 8 &amp; 9, 2019 !</i>					

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# Learning Session Descriptions

**9:15 AM – 10:30 AM**

## **A1: Improving Organizational Performance and Engaging Your Workforce through Strategy Deployment**

Michelle Gallitto, Strategy Deployment Director, Martin's Point Health Care

Most people come to work every day with the best intentions of having a positive impact on their work, their organization, and the world around them. Yet, what if they can't measure their impact? What if it is not clear how their work drives the organization's strategy? And what does this mean for your employees' engagement and organizational performance?

Strategy Deployment is the act of translating an organization's strategy into day-to-day actions at all levels to measurable drive toward the organization's goals and mission. It is foundational to implementing a Lean management system. Specific strategic benefits include enhanced organizational focus, learning about the key drivers of organizational performance, increased employee confidence and engagement, aligned organizational planning efforts and incentives, leader standard work, and improved results.

This session will share highlights of the Strategy Deployment journey at Martin's Point Health Care, including how it engaged people at all levels—from the Board to front-line employees—to translate strategy into goals and actions across the organization. The tools and processes used will be noted, and the critical role Strategy Deployment has played in building the Martin's Point Management System. This has had a remarkable, positive impact on employee experience, organizational performance, the ability to meet strategic goals, and the value the workforce was able to provide to patients, members, and community.

Regardless of where you are in your Lean journey, the aim of this session is to provide new insights into how you can create clearer focus and align efforts in your organization to foster engagement, improve organizational performance, and have a greater impact.

This session will provide you with value and insights based on these experiences, regardless of where you are in your Lean journeys or what kind of organization you work in. Attendees who may be considering Strategy Deployment for the first time could benefit from hearing about our early stages and getting a sense of what the longer-term vision could be, while participants who are more seasoned with regard to Strategy Deployment can learn new angles, perspectives, or tools to enhance their current process.

## Michelle Gallitto

Strategy Deployment Director, Martin's Point Health Care

Michelle Gallitto is the Strategy Deployment Director at Martin's Point Health Care in Portland, Maine. In this role, Michelle facilitates employees at all levels to identify focus areas and actions that will measurably drive organizational strategy, provide a basis for learning, and improve business performance.

She has experience in both payor and provider healthcare organizations, including Blue Cross Blue Shield of Massachusetts and Massachusetts General Hospital. As a member of the Martin's Point Management System, Michelle partners with leaders and employees to build a culture of respect for people and continuous improvement.

She is a passionate believer that Strategy Deployment helps bring organizational strategy and daily work closer to alignment and likes to share her experiences to help others on their journeys, hoping to impart a deeper understanding of the critical role Strategy Deployment plays in creating a Lean management system.

Michelle earned her BA in Psychology from Colby College and her MBA from Boston College.

## **A2: The Real Cost of Poor Quality – It's more than rework and scrap**

Robert Burke, Managing Partner/COO, Value Innovation Partners

Experts have estimated that Cost of Poor Quality (COPQ) typically amounts to 15-40% of gross sales for manufacturing and service companies. Independent studies reveal that the Cost of Poor Quality is costing companies millions of dollars each year and its reduction can transform marginally successful companies into profitable ones.

Yet most executives believe that their company's Cost of Poor Quality is less than 5%, or they just do not know what it is. All levels of executives recognize that quality is an absolute necessity to survive and succeed in today's business environment.

As the economy continues to challenge every business owner in North America, many business managers and owners are turning to the development and implementation of an internal system designed to reduce cost and improve profitability. ICS has developed a cost of quality process that will help organizations stop producing waste and eliminate non value-added costs that will improve the bottom line.

Most businesses do not know what their quality costs are because they do not keep reliable statistics. Finding and correcting mistakes consumes an inordinately large portion of available resources. However, typically, the cost to eliminate a failure in the customer phase is five times greater than it is at the development or manufacturing phase. Effective quality management

decreases production costs because the sooner an error is found and corrected, the less costly it will be. Every time work is redone, the cost of quality increases. In short, any cost that would not have been expended if quality were perfect contributes to the cost of quality.

You will learn about—

- ✓ Total Quality prevention, appraisal, and failure costs
- ✓ Four main categories of COPQ
- ✓ Potential savings from reducing COPQ: Hard, Soft and Cost Avoidance.

## **Robert Burke**

Managing Partner/COO, Value Innovation Partners

Robert Burke is a Partner and Chief Operating Officer of Value Innovation Partners, Ltd. He is a certified Six Sigma Black Belt, Lean Sensei, CPIM from the Association of Operations Excellence (APICS), and holds an ISO 9000 Assessor certificate. He is the President of the Association for Manufacturing Excellence-Northeast Region.

He has held positions ranging from Materials Director, Production and Inventory Control Manager, Master Planner and Machinist. He has a broad background and experience in many different industries such as: Pharmaceutical, Medical Device, Packaging, Heavy Equipment, Aerospace and Defense, Chemical, Printing, Services, Stamping, and Specialty/Engineered-To-Order Manufacturing.

Bob provides training and implementation methods in areas of Lean Sigma Manufacturing, Pharmacovigilance, Supply Chain Management, Kaizen, Vendor Managed Inventory, Logistics Planning, and Supplier Certification.

He has co-authored dozens of published articles on the subject of Lean operations. He has also presented Lean Sigma workshops and sessions at both national and international conferences. He is a member of AME, IIE, ASQ and APICS. He has a B.S. in Business Administration.

## **A3: Creating Lean Leaders in a Virtual Environment: The Work of One Wide-Spread Federal Agency**

Stephanie Magill, Field Operational Lean Lead, CMS/CMCHO

Darlene Dumont, Public Service Program Director, DBA, Lean Enterprise Institute (LEI)

In a world where people are working virtually and geographically separated more and more, how do we develop Lean leaders and help them to create a culture of problem-solvers? This was a challenge for a federal agency that has 10 regional offices around the country and was asked to

develop a culture of problem-solvers...virtually and without a travel budget.

If this is a situation that you can relate to or even if you are just curious and want to learn more, come to our Learning Session and hear about what worked for us and what didn't so you can establish an approach that's right for you. We are all in this together!

Being able to engage staff and leaders on a regular basis is critical to the success of any Lean transformation. Being able to engage them virtually adds another layer of complexity that we are all trying to figure out and learn various approaches that can work best for our own cultures.

This learning session will provide you with information that describes the challenges the agency was faced with in addition to the approach that was used to be successful, together with a variety of lessons learned along the way. We will share the criteria for selecting the geographically separated "Lean leaders", together with the assessment tool used to create a gap closure plan and the approach to close the gap for the Lean leaders

You will learn—

- A developmental approach to Lean Thinking and Practice that can be utilized in a geographically-separated, virtual workforce.
- Several tools and techniques will be revealed to help you prepare and reflect upon an approach that can be tailored to meet your own environment needs.

## **LCDR Stephanie Magill, MS, RD, CD**

Field Operational Lean Lead, Centers for Medicare & Medicaid Services (CMS)

Darlene Dumont, Public Service Program Director, DBA, Lean Enterprise Institute (LEI)

Lieutenant Commander Magill serves as the Field Operational Lean Lead for the Centers for Medicare & Medicaid Services (CMS). She also serves as the strategic communications lead for the implementation of the Lean Management Operating System for CMS.

LCDR Magill served as the Public Affairs Officer for the Centers for Medicare & Medicaid Services, Seattle Regional Office for over seven years. Prior to joining the United States Public Health Service (federal uniformed service of the U.S. Public Health Service (PHS), and is) and CMS, she served as the Public Affairs Officer for the Food and Drug Administration and as a President Management Fellow at the US Department of Agriculture, Food and Nutrition Service.

LCDR Magil earned her Masters of Science in Nutrition at the University of Utah and a Bachelors of Science in Biology at Gonzaga University.

The United States Public Health Service Commissioned Corps is one of the seven uniformed services of the United State. Its officers are non-combatants, wear the same uniform as the United States Navy or the United States Coast Guard, and are under the direction of the United States Department of Health and Human Services.

## Darlene Dumont, DBA

Public Service Program Director, Lean Enterprise Institute (LEI)

Dr. Darlene Dumont is currently the Public Service Program Director at LEI. She brings with her over 29 years of diverse business experience with demonstrated results in organizational transformation, executive coaching, systems-thinking, scientific problem-solving, strategy deployment, consulting, curriculum design for universities and organizations, project management, and organizational design.

She has worked in a variety of industries including government, healthcare, aerospace, nuclear, insurance, academia, and the Dept. of Defense. She is a retired officer of the Air National Guard and, prior to becoming a Lean practitioner, was an accountant for 11 years.

Darlene began her Lean journey while working in the aerospace industry in 2000 and has since applied that knowledge to hundreds of processes in several industries and organizations.

In 2012, she completed her Doctorate of Business Administration (DBA) while working in healthcare. Her action-research combined a variety of models and concepts to compliment Lean thinking and practice and resulted in a methodology called “Relationship-Centered Lean™.” The approach empowered and engaged multi-disciplinary staff throughout the hospital and resulted in a 40% reduction in patient falls within 18 months.

She is currently working with a variety of federal and state agencies to help spread Lean thinking and practice and create a problem-sharing culture.

### **A4: Underwater or Staying Afloat? How to Engage a Drowning Team**

Cameron Shuck, Senior Strategic Performance Advisor, Martin's Point Health Care

In an environment where many teams cannot or believe that they cannot dedicate time for improvement, Lean practitioners need to consider alternative approaches to day or week-long events.

This session will share a set of techniques and tools a Lean practitioner can use to engage a frustrated team and help them stay afloat rather than drown in frustration.

In this session, you will learn about (and share actual stories) –

- Getting buy-in.
- Techniques for engaging a workforce that cannot come off-line for Kaizen or improvement events.
- Techniques for seeing the 8 Wastes (Frustrations)
- Defining the problem and measuring it

- How best to define the problem, capture data and focus on the causes the team can impact
- Engaging a group without shutting down the line/work.

## Cameron Shuck

Senior Strategic Performance Advisor, Martin's Point Health Care

Cameron Shuck's professional background spans diverse fields and organization, from social work to human systems integration to project management.

As an ASQ Lean Six Sigma Black Belt, Cameron has over 10 years' experience in Process improvement work in manufacturing settings such as at General Dynamics: Bath Iron Works, and more recently in health care at Martin's Point Health Care in Portland, Maine.

He is a graduate of Penn State with a BS in Psychology and Edinboro University with a M.Ed. in Educational Leadership.

## A5: LEAN – It's For Everyone!

David S. Veech, Senior Lecturer, Fisher College of Business, The Ohio State University  
CEO, D. Veech & Company, Inc.

If you, regardless of the type of organization you work in, are interested in learning how to work toward achieving operational excellence, then this is the session for you.

The world around us is changing at a rapid pace. Providing value for our clients and competition for customers and for resources requires that we think about understanding the gap between where we are and where we want to be.

Contrary to what some believe, Lean thinking isn't just for manufacturing, it can be used in any organization. The time is now to learn about the ideas and tools useful in any sector to implement a Lean culture.

Operational Excellence is an approach that is used to continuously improve a process in any organization to eliminate waste and add value for the customer. This learning session will explain why operational excellence is important to an organization and how having such a focus does not only add value to the customer, but how it can improve efficiencies for the organization as well. As the concept of continuous improvement suggests, we concentrate on improving, sustaining and improving again.

In this session, we will discuss how to effectively introduce Lean within an organization and the importance of showing respect and engaging employees by giving them a voice to make suggestions and to have a say in how the work could be performed. We will discuss why it is

culturally important to understand a person's fear of change or the unknown, and how you can address those fears, while embarking on a Lean journey. We will also discuss how to start with small wins in order to gain the trust of the employees.

In this session you will also learn about –

- Measuring is important to understanding the gap between current and desired state. We will discuss Leading vs. Lagging Metrics and why it is important to have Leading Indicators (if you can't measure a process, you can't fix it).
- Gemba: It is to "go and see" the work being done in order to understand the true process that is being looked at – we must never assume that we know how a job is performed.
- Contents of a Lean tool box and how the various tools can be used effectively.
- Creating an A3 and why it is so important to be able to tell your story and show how you closed the gap of moving from where you are to where you want to be.
- A better understanding of how to go about changing a culture – how to treat your employees with respect while showing them how moving forward could benefit their work life.

## David S. Veech

Senior Lecturer, Fisher College of Business, The Ohio State University  
CEO, D. Veech & Company, Inc.

Work should be fun, exciting, challenging, and interesting. Leaders make or break this kind of workplace. David started D. Veech & Co. and Leadersights to help organizations of all types develop better leaders. He has been teaching leadership and Lean systems since 1998.

He is the author of "Leadersights: Creating great leaders who create great workplaces" (2017, CRC Press), "The C4 Process: Four Vital Steps to Better Work" (2011, Business Innovation Press, an imprint of Integrated Media Corp.) and "FirstLine: A team leader's guide to Lean thinking" (2005, PKI)

David is a Senior Lecturer in the Fisher College of Business at the Ohio State University, teaching in the Master of Business Operational Excellence (MBOE) Program. His research, teaching, and consulting focus on people in organizations and how Lean, leadership, and learning systems contribute to overall employee satisfaction and well-being and how Lean tools and systems sustain a great workplace. He delivers keynotes and seminars on topics related to leadership, problem solving, suggestion systems, employee involvement, team building, and creating satisfying workplaces.

David retired from the US Army in 2001 after a 20-year career. His military career allowed him to serve in infantry units in the United States, Germany, and Southwest Asia as well as in the acquisition and procurement of critical defense weapons systems. He ended his military career teaching Lean systems in production, quality, and manufacturing at the Defense Acquisition University.

David holds a Bachelor of Arts degree in International Relations from Western Kentucky University, and a Master of Science degree in Industrial Management from Clemson University. He has completed significant doctoral work in General and Educational Psychology at the University of Kentucky and Capella University.

# 10:45 AM – Noon

## B1: Engage your Non-Production Employees in your Continuous Improvement Journey

Dan Fleming, Director of Consulting Services & Certified Shingo Institute Workshop Facilitator, Greater Boston Manufacturing Partnership (GBMP)

Using the principles and tools of Continuous Improvement, all employees have the knowledge to improve their job and processes. All can impact the ease and quality of their own work while eliminating waste and impacting their organization's bottom line and ultimate currency – whether it's measured in money, patient satisfaction, employee retention, or other KPIs.

In this session you will –

- Learn how to engage non-production employees - from HR and R&D to purchasing, customer service, and other departments - in utilizing the principles and tools of Lean.
- Learn how all functional areas of an organization – no matter whether it's a manufacturing, clinic, hospital, government, or other setting - can be improved once management and employees alike realize that waste exists in these processes too.
- Hear how organizations who employ kaizen for departments outside of production (the shop floor, the nurses) routinely improve their overall company's productivity two and sometimes even threefold!
- Discover how the tools of Lean apply to making improvements in an office environment, with specific examples and case studies.

### Dan Fleming

Director of Consulting Services & Certified Shingo Institute Workshop Facilitator,  
Greater Boston Manufacturing Partnership (GBMP)

Daniel J. Fleming is GBMP's Director of Consulting Services & a Certified Shingo Institute Workshop Facilitator.

He is a Shingo Prize Recipient and is SME Lean SILVER Knowledge Certified. Dan brings 30+ years of experience in operations and engineering to GBMP, including more than 25 years of hands-on experience learning, leading and teaching the principles and tools of the Toyota Production Systems and continuous improvement.

He was the lead developer of GBMP's highly regarded Lean in Healthcare Certificate Course. This comprehensive program was one of the first of its kind in healthcare. Over the past five years Dan has been the lead faculty on programs taught at more than 30 hospitals, medical clinics, and nursing homes. More than 600 students have gone through the program, including clinicians, hospital and nursing home staff, and architectural professionals. Dan has been an inspiring and informative speaker at many regional, national and international conferences.

Prior to becoming the Director of Consulting Services, Dan was a Continuous Improvement Manager at GBMP for 14 years. He was the Director of Operations at United Electric Controls Company, where he was a recipient of the *Shingo Prize for Operational Excellence*. He has worked with a wide range of organizations including healthcare, electronics, medical device, pharmaceutical, equipment manufacturers, food processing, machine shops, contract manufacturers, and warehouse and distribution. Dan holds a Bachelor's Degree in Electrical Engineering Technology from Northeastern University.

## B2: Managing People in a Lean Transformation

Norbert Majerus, President, Productivity Innovation and Executive Partner, Productivity Inc.

The success of Lean initiatives comes not only from a better process but also from a better way of managing and leading the people in the process. This learning session shares the basic principles of people management, illustrated by experiences and examples from the Lean initiative at the Goodyear Innovation Centers (as described in [Lean-Driven Innovation](#)).

Many companies have successfully implemented Lean principles and tools needed to successfully transform their organizations. Unfortunately, principles and tools without establishing a Lean culture will frequently fail to deliver all that is possible. A Lean transformation requires new ways to manage people in the new Lean environment, which creates a collaborative, innovative culture.

This learning session focuses on the critical people skills observed at many successful Lean organizations, like Toyota. Examples from real-life experiences will present you with Lean behaviors you can begin to model in your own organization.

This will help you to change behaviors to lead a more successful Lean transformation and be a better influencer, manager, leader, and coach.

The session will focus on the following:

- What is different in a Lean operation?
- Motivating and influencing associates
- Engaging associates in the Lean transformation
- Practices that support respect for people
- Acquisition and teaching of new Lean people skills

- Required Lean leadership behaviors
- R&D management subjects, including people-centric Lean, motivation, people engagement, inside-out transformation, upside-down leadership, and respect for people, etc.

## Norbert Majerus

Founder, Norbert Majerus Consulting

Beginning in 2005, Norbert Majerus implemented a principles-based Lean product development process at the three Global Innovation Centers of The Goodyear Tire & Rubber Company. For more than a decade he was Goodyear's Lean champion in research and development. Norbert is a master black belt six sigma and master black belt in Lean.

Norbert, born and raised in Luxembourg, has a Master's degree in Chemistry from the Universitaet des Saarlandes, Saarbruecken, Germany. He joined Goodyear in Luxembourg in 1978, transferred to Akron in 1983, and has worked most disciplines in the Goodyear innovation centers in Luxembourg and Akron. His work experience has included innovation, new product design, equipment design, manufacturing, new product marketing and launch, new tire design standards, original equipment tire design, activity-based accounting, TQM, project management, ISO 9001 and other global OE quality standards, six sigma, Lean innovation, and Lean product development

In 2016, Norbert published his first book, Lean-Driven Innovation (CRC Press, 2016), which received the Shingo Research Award. Also in 2016, with Norbert's guidance, the Goodyear R&D organization applied for and received the AME Excellence Award. Norbert holds several Goodyear chairman and CTO awards, as well as 60 U.S. patents and trade secrets and numerous international patents.

Since retiring from Goodyear in 2017, he continues to share his extensive Lean expertise through his consulting company. As the owner and founder, Norbert has helped manufacturing and service organizations apply Lean thinking to their research and development operations and innovation activities, and, in doing so, improved their processes and their abilities to efficiently deliver new products and services.

## **B3: Building a Psychologically Safe Environment that Promotes Learning & Productivity**

Dr. Darlene Dumont, Public Service Program Director, Lean Enterprise Institute (LEI)

Do you work in a psychologically unsafe environment in which any mistakes made result in the "blame game?" Are co-workers defensive? Do they hoard information, at the expense of others? Whether you answered "yes" to any of these questions, it's important to understand the foundational effects this type of an environment can have on the ability for an organization to

learn together and adapt to our ever-changing world we live in.

Many of us have worked in psychologically “toxic” environments at one time or another; this session will describe the signs to watch for, understanding the effects it has on the organizations ability to learn and grow, while also describing things we can do to improve it.

In this session, you will learn about behaviours that create a psychologically unsafe environment in any organization, the effects it has on an organization’s Lean culture, and what the fundamental risks are if these behaviours are not changed. We will use an assessment tool to help capture these qualitative behaviours in a quantitative way and set targets for how to make it better.

## **Darlene Dumont, DBA**

Public Service Program Director, Lean Enterprise Institute (LEI)

Dr. Darlene Dumont is currently the Public Service Program Director at LEI. She brings with her over 29 years of diverse business experience with demonstrated results in organizational transformation, executive coaching, systems-thinking, scientific problem-solving, strategy deployment, consulting, curriculum design for universities and organizations, project management, and organizational design.

She has worked in a variety of industries including government, healthcare, aerospace, nuclear, insurance, academia, and the Dept. of Defense. She is a retired officer of the Air National Guard and, prior to becoming a Lean practitioner, was an accountant for 11 years.

Darlene began her Lean journey while working in the aerospace industry in 2000 and has since applied that knowledge to hundreds of processes in several industries and organizations.

In 2012, she completed her Doctorate of Business Administration (DBA) while working in healthcare. Her action-research combined a variety of models and concepts to compliment Lean thinking and practice and resulted in a methodology called “Relationship-Centered Lean™.” The approach empowered and engaged multi-disciplinary staff throughout the hospital and resulted in a 40% reduction in patient falls within 18 months.

She is currently working with a variety of federal and state agencies to help spread Lean thinking and practice and create a problem-sharing culture.

## B4: Joy at Work: Energize Your Engagement in Operational Excellence!

Abigail Am, Performance Improvement Specialist, Center for Performance Improvement, MaineHealth

Joyce Mendoza, Performance Improvement Specialist, Center for Performance Improvement, MaineHealth

Bridget Miller, Director of Operational Development and Strategic Alignment, Lincoln Health

Since 2013, the MaineHealth system has been rolling out a Lean daily management system across its 13 locations. One of the hardest things any organization faces is how to sustain engagement once an improvement system has been implemented. Keeping your employees engaged in Operational Excellence poses its own unique set of challenges. Having faced this issue head-on, the presenters will share new ways they are bringing “Joy at Work” to their organization through innovative approaches to engagement.

To date, MaineHealth member organizations have employed a variety of methods for celebrating success and encouraging engagement – blog posts, newsletters, posters, awards, and member celebrations. Yet, the most recent results of survey data prompted a group of improvement specialists to focus on more compelling ways to celebrate wins and sustain engagement in process improvement. The presenters will share how they were inspired by Paul Akers’ book, *Two Second Lean*, to develop the Gemba Watch program as a new method for spreading this best practice across the organization.

You can expect to learn—

- How MaineHealth is boosting engagement in its Operational Excellence program to ensure its sustainability in the future, including:
  - A system-wide celebration of KPI Teams and Advocates who have excelled in process improvement.
- The new methods the organization is using to enhance “Joy at Work” while still continually applying process improvement methodologies—
  - Including a new fellowship program designed to help managers reach the next level of engagement in Operational Excellence, with special focus placed on coaching strategies, strategic alignment, improvement tools and enhancing overall engagement.

## Joyce Mendoza

Performance Improvement Specialist, Center for Performance Improvement, MaineHealth

Joyce Mendoza has served as a Performance Improvement Specialist in the Center for Performance Improvement (CPI) since November, 2015.

Prior to her current position, she functioned as a CPI Project Manager in support of Maine Medical Center from 2005 to 2013. She has highly diverse experience in both healthcare delivery and insurance with expertise in process improvement and training, project management, strategic planning and product development/marketing analysis.

Joyce has an M.B.A. from Rensselaer Polytechnic Institute and is certified as a Lean/Six Sigma Green Belt. In addition, she is a graduate of the Healthcare Project Management Certificate Program at the University of New England.

## Abigail Am

Performance Improvement Specialist, Center for Performance Improvement, MaineHealth

Abigail joined the Center for Performance Improvement at MaineHealth in July of 2016 as a Performance Improvement Specialist, helping to implement a Lean Daily Management system, drive data-driven problem solving, lead projects to redesign and improve processes, and create a culture of continuous improvement.

Prior to working for MaineHealth, she worked for a Fortune 10 company as an Operational Excellence project manager.

Abigail is a Lean Six Sigma Black Belt. In addition to her B.S. in Biology from the University of Vermont, Abigail is about to complete her Master of Science in Operations Management with a focus in Decision Analytics from the University of Alabama.

## Bridget Miller

Director of Operational Development and Strategic Alignment, Lincoln Health

Bridget is the Director of Operational Development and Strategic Alignment at Lincoln Health. She began her journey in quality and process improvement as a Behavioral Science graduate of the Air Force Academy. Upon graduation, Bridget worked in Human Factors Engineering and Quality Improvement at several Air Force bases in the U.S. and Japan.

After leaving the Air Force, Bridget began her own consulting company in Boise, Idaho where she teamed up with businesses and colleges in developing training, teaching organizational management and conducting teamwork seminars. After a family move to North Carolina, Bridget became the training manager for a Fortune 500 cabinet manufacturing company. In that role, she developed and

implemented a Pay for Performance system before making the choice to move to Maine and stay home to raise her 4 children.

Bridget joined Lincoln Health in January of 2015. After many moves and roles in various industries, Bridget is very happy to utilize her background and education in the healthcare field. She is a strong proponent of Operational Excellence within organizations.

In addition to her B.S., Bridget also has an M.A. in Psychology and is certified as a Lean/Six Sigma Green Belt and a Kepner-Tregoe Problem Solving Decision Making Certified Program Leader.

## B5: Developing a Lean Culture

Anne Frewin, Senior Lean Operations Manager, IDEXX Laboratories

Lean tools are great but they aren't sustainable without a Lean culture to support their use.

A Lean culture without tools creates enthusiasm but short-lived momentum. How do you develop culture? Everyone talks about it and we all know it is critical but can we change the culture of our organization? Yes you can.

At IDEXX we have found that by teaching culture up front and then introducing a couple of fundamental tools such as Gemba boards and Rapid Improvement Projects, we are able to affect the culture from the bottom up. Executive support is necessary for a successful culture change but the change isn't forced on the employees. The change is embraced and implemented by teams across the organization.

You will learn –

- how to focus on culture and how to use the tools to help drive a cultural change;
- how to educate leaders on a Lean Culture;
- how to use Gemba Boards to engage teams and develop a culture of continuous improvement;
- how to use Improvement Projects to spread the culture to other areas, breaking down silos along the way.

## Anne Frewin

Senior Lean Operations Manager, IDEXX Laboratories

As the Senior Lean Operations Manager at IDEXX, Anne oversees six Lean Leaders across the country, who work directly with front-line teams in IDEXX reference labs to instill a culture of continuous improvement and employee engagement.

She joined IDEXX in March 2017 as the Lean Six Sigma Leader supporting Manufacturing Operations and Corporate before moving into her current role in January 2018. In her first year at IDEXX, the number of teams embracing Lean grew resulting in increased flow, communication, and employee engagement.

Anne has a Master's in Organizational Leadership from St. Mary's University of Minnesota and a Master's in Healthcare Administration from the University of Minnesota. Prior to joining IDEXX she was the Director of Process Improvement at Central Maine Healthcare.

**2:00 PM – 3:15 PM**

### **C1: 7 Steps to Organizational Zen**

Janie Downey Maxwell, Founder, Organizational Habits

Getting a lot done is different than doing great work. To do great work, you want to be efficient and effective, and you want to be truly engaged with what you're working on. Organizational Zen outlines 7 steps to help keep you engaged with whatever tasks you take on – from running efficient meetings, to understanding how habits drive you, to taking care of your health.

You'll learn 7 steps to help you be more organized, to be more efficient, and to truly connect with your work. The more connected you are with your work, the better your work will be. And the better your work is, the more joyous you'll be about bringing your best self to work each day. Each of the 7 steps starts with baby steps. By the end of the session, you should have at least 3 actionable ideas to help you step out in a new direction.

You will leave feeling organized, inspired, and motivated to take on new challenges. Organizational Zen focuses on the joy of doing your best work, and gives you simple tools to help you discover how and why you work the way you do.

Even for experienced LEAN practitioners, this offers personal insights to help you go to a deeper level to find efficiency and joy in your work.

### **Janie Downey Maxwell**

Founder, Organizational Habits

Janie Downey Maxwell has always enjoyed organizing chaos - from years of working as an account executive with advertising agencies, to running the business end of the creative departments at Appleseed's and L.L. Bean catalogues, to directing children's theater productions.

And she likes to get a lot of stuff done. While working 40 hours a week, Janie decided to write a historical novel, published a children's play that runs weekly around the world, and last year wrote a musical. She is very involved with local theater - directing, acting, singing, and making props. And she volunteers with the Animal Refuge League of Greater Portland and the Maine Historical Society.

She runs two web businesses in addition to her day job. And she writes, speaks, and presents regularly about Organizational Zen. She has a degree in history from the University of Virginia.

## C2: Value Stream Mapping for the Office

Jason Dix, Continuous Improvement Manager, Geiger Group

Value Stream Mapping is a skill frequently used in manufacturing to identify current and target conditions. This skill, while valuable, often gets overlooked in the office. It can be difficult to understand the process flow when your workers are mainly behind a computer and your primary material is information.

As we know direct observation in the gemba is critical to understanding. So how do you observe in an office environment and turn that into a value stream map? This session will provide instruction on how to observe office workers, identify with them the key components of a value stream map for the office, and work through common barriers that come with value stream mapping in the office. It will provide a better understanding of value stream mapping for the office and deliver tools specific to the office environment.

Value stream mapping in an office can be very different from manufacturing. The biggest shift is the material we use. In manufacturing the material changes from process to process, or machine to machine. In an office the main (often the only) material is information. Many people get confused with this since in manufacturing we are trying to sync the material flow with flow of information and production flow. In this session we will look at how to sync process flow using input, throughput, and output highlighting what information is getting processed and what information is driving the process

## Jason Dix

Continuous Improvement Manager, Geiger Group

Jason Dix is the Continuous Improvement Manager for the Geiger Group. In this role Jason has continued the development of Geiger's robust internal continuous improvement certification program.

He is responsible for Lean training and the continued education of Lean concepts for Geiger personnel. Jason serves as facilitator and project manager for Kaizen events, and is the chief administrator of Geiger's Idea Generation program.

Jason has worked to build GeigerGroup's reputation within the community by serving as a guest lecturer to the University of Southern Maine Lewiston/Auburn campus. Jason holds his Lean Six Sigma Yellow belt.

### **C3: Lean System for Managing – The glue that holds it all together**

Robert Burke, Managing Partner & COO, Value Innovation Partners & President, AME-Northeast Region

This session outlines a systematic approach to provide the necessary input to ensure efficient economic operation of a business. Proper use of this tool will increase both the overall effectiveness of leaders and their ability to reach established goals & objectives on a daily basis.

*Lean System For Managing* provides the necessary level of control to achieve and sustain improvements while maintaining high productivity and high levels of quality. It is a tool for making sound business decisions based upon accurate information:

- Communicate corporate goals and objectives
- Organizational alignment process
- Visual / Execution control systems
- Barrier identification and removal process
- Key Performance Indicator development
- Reward and recognition system
- Provide immediate status of ongoing operations

As you will see, the benefits of this are -

- Makes problems visible for resolution
- Improved customer communications
- Reduction in cycle time variability
- Increase in throughput
- Improved and focused customer communication
- Management of work load with customer expectation as a paramount consideration
- Highlights capacity needs and inefficiencies
- Developed methodology that has some standard components which can be customized by section or sector
- Drives proper use of metrics.

# Robert Burke

Managing Partner & COO, Value Innovation Partners &  
President, AME-Northeast Region

Robert Burke is a Partner and Chief Operating Officer of Value Innovation Partners, Ltd. He is a certified Six Sigma Black Belt, Lean Sensei, CPIM from the Association of Operations Excellence (APICS), and holds an ISO 9000 Assessor certificate. He is the President of the Association for Manufacturing Excellence-Northeast Region.

He has held positions ranging from Materials Director, Production and Inventory Control Manager, Master Planner and Machinist. He has a broad background and experience in many different industries such as: Pharmaceutical, Medical Device, Packaging, Heavy Equipment, Aerospace and Defense, Chemical, Printing, Services, Stamping, and Specialty/Engineered-To-Order Manufacturing.

Bob provides training and implementation methods in areas of Lean Sigma Manufacturing, Pharmacovigilance, Supply Chain Management, Kaizen, Vendor Managed Inventory, Logistics Planning, and Supplier Certification.

He has co-authored dozens of published articles on the subject of Lean operations. He has also presented Lean Sigma workshops and sessions at both national and international conferences. He is a member of AME, IIE, ASQ and APICS. He has a B.S. in Business Administration.

## **C4: Advancing Healthcare Value through Optimized Inventory and Supply Management**

Suneela Nayak, Director of Operational Excellence, Maine Medical Center

Catherine Palleschi, Nursing Director Coronary Intensive Care Unit, and Cardiology Interventional Unit, Maine Medical Center

Advancing Patient Safety is central to improving quality in healthcare. In high-tech care environments such at MMC's Coronary Care Unit, having the right supplies at the right time for the right patient is as essential as life support.

This learning session focuses on how Maine Medical Center leveraged its Operational Excellence Program to concurrently improved customer satisfaction and reduced waste by optimizing inventory and supply management for its busy Coronary Critical Care Unit.

In partnership with Supply Chain and Materials Management, it deployed basic LEAN tools to help us gain deeper understanding of barriers and implement solutions that have led to sustainable improvement.

Our success has led to spread across multiple clinical care departments in our busy tertiary care teaching hospital, and soon across our Health System. Along with an overview of our Operational

Excellence Program, we will share our team's process, our learnings, the value our work has brought to our organization and our next steps.

Excitement builds every morning, when the Gemba Walk at MMC comes through to the Coronary Critical Care Unit, Materials Management Department, and over 100 additional departments at Maine Medical Center.

This session will take the learner on a journey of discovery to showcase how we overcame skepticism to discover the satisfaction of ownership in our work and the success we experience everyday with positive customer feedback. We will share improved performance metrics, and value we are bringing to our patients and families. Join us as we share our journey and excitement with you!

- Describe the Maine Medical Center Operational Excellence Program,
- Discuss commonly seen barriers to care delivery, and Lean approaches used for problem solving,
- Review our improvement goals, PDSA cycles, spread and results,
- Share our learnings along the way, and our plans to evolve and develop our program.

## **Suneela Nayak, MS RN, Lean Six Sigma Black Belt**

Director, Operational Excellence, Maine Medical Center

Suneela serves as the Director of Operational Excellence at Maine Medical Center. As an experienced clinician and educator, Suneela has served as the Clinical Quality Specialist, consulting with learning collaboratives throughout the MaineHealth system.

Prior to joining MaineHealth, Suneela was with the Center for Clinical and Professional Development at Maine Medical Center in Portland. She has been a Clinical Services Director for Oncology and a Family Nurse Practitioner at McGill University Teaching Hospitals in Montreal, Canada.

Suneela holds a Black Belt in Lean/Six Sigma, a Bachelor of Science and Advanced Nursing Practice Certificate from McGill University, and a Master of Science in Nursing from the University of Southern Maine.

## **Catherine Palleschi**

Nursing Director, Coronary Intensive Care Unit, and Cardiology Interventional Unit,  
Maine Medical Center

Cathy Palleschi brings twenty-five years as a nursing leader with a passion for providing the highest quality care. Her strong commitment to providing the highest quality care has led her to explore Lean applications in healthcare.

Two years after its introduction at MMC, Cathy is a Lean Leadership Coach sharing expertise to help colleagues advance improved healthcare value for patients, families, and employees at MMC.

Cathy is the nurse director for Maine Medical Center's Coronary Intensive Care Unit and a twenty-four bed Interventional Unit. Cathy holds an MBA from Saint Joseph's College and a Bachelor's degree in nursing from University of Southern Maine.

## **C5: Breaking Through Conceptual Blind Spots to Process Improvement**

Bruce Hamilton, President, Greater Boston Manufacturing Partnership (GBMP)

Conceptual blind spots are misperceptions caused by deep-seated beliefs. In the context of Lean, these blind spots hamper understanding and limit the full benefits of Lean transformation.

In describing the Toyota Production System, for example, Shigeo Shingo railed against the assumptions behind economical order quantities and acceptable quality levels as undesirable rationalizations of speculative productions.

On the social side of Lean, Shingo chided engineers for failing to visit the floor and chastised management for creating a caste system in which the people who did the work were powerless to fix problems. He also debunked the concept that a process is just a sum of operations; yet today most cost accounting models focus only on operations, yielding product costs that Eli Goldratt called "precisely wrong": calculated to four decimal places, but not reflective of actual costs

These are just some of many misconceptions from mass production, both technical and social, that continue to thwart Lean transformations. Fifty years after introduction of TPS, we are now asking our managers to "go see," to go to the Gemba (Gemba Kaizen is a Japanese concept of continuous improvement, designed for enhancing processes and reducing waste). Within a Lean context, Gemba simply refers to the location where value is created, while Kaizen relates to improvements). But even in the Gemba, the real place, what can managers see if they are unable to transcend their conceptual blind spots? How can their eyes be opened

You will learn of over a dozen common conceptual blind spots, as well as tactics to help managers and employees overcome these, to improve their mastery/skillsets.

## **Bruce Hamilton**

President, Greater Boston Manufacturing Partnership (GBMP)

Bruce Hamilton is the President of widely and well-known GBMP, a not-for-profit Continuous Improvement & Six Sigma training resource for manufacturing and healthcare organizations in the Northeast United States. GBMP's mission is to help sustain a strong and vibrant regional economy by

improving the operational profitability and global competitiveness of organizations, large and small, through training in Lean principles and best practices.

Bruce is Director Emeritus for the Shingo Institute, home of the Shingo Prize, and is currently a Senior Examiner for the Shingo Prize. He is a past recipient of the Shingo Prize in both the business and academic categories and an Inductee to the Shingo Academy. In 2015, he was inducted into the AME Manufacturing Hall of Fame.

An early adopter of Lean 30 years ago, his Massachusetts factory was visited by Shigeo Shingo, Shigihiko Nakamura, and Ryuji Fukuda. From 1994 to 1998 he was coached by Hajime Ohba and TSSC.

He is the creator of the well-known *Toast Kaizen* and dozens more award-winning Lean training DVDs and is the co-author of the *e2 Continuous Improvement System*. He publishes a blog, “OldLeanDude”, and hosts a free monthly webinar to help individuals understand the Toyota Production System (TPS) and gain its full benefits.

Before joining GBMP, Bruce held management positions in Marketing, IT, Operations Management, and General Management and, in 1990, led his organization to a Shingo Prize. He is equally at home in administrative, operational, and healthcare environments.

Bruce holds a BA and attended Bowdoin College and the University of Arizona.