

# 2017 LEAN SYSTEMS SUMMIT: PRE-SUMMIT WORKSHOPS

AUGUST 10, 2017

7:00am - 8:00am	<b>Registration &amp; Continental Breakfast.</b> (There will also be a mid-morning break with refreshed drinks and a mid-afternoon break with drinks and “nibbles” to boost your energy!)					
	Room #1	On-Site	Room #2	Room #3	Room #4	Room #5
8:00am - Noon	<b>PS-AD1</b>  Lean Champions: Maximize Business Performance through Lean, Six Sigma, and Team Performance Improvement <i>(Cont'd below)</i>	<b>PS-AD2</b>  Study Mission with Alan Robinson at Jotul North America  <i>(Continued below)</i>	<b>PS-HD1</b>  Daily Management - A Toolset for Communication and Collaboration	<b>PS-HD2</b>  Becoming an Effective Communicator by Connecting with Others	<b>PS-HD3</b>  Sustaining Success	<b>PS-HD4</b>  Learning Lean -- Interactive Simulation
Noon - 1:00pm	<b>Lunch</b> (is provided and includes a variety of choices for entrees, salads, desserts, etc.)					
1:00pm - 5:00pm	<b>PS-AD1</b> <i>(Cont'd)</i>  Lean Champions: Maximize Business Performance through Lean, Six Sigma, & Team Performance Improvement	<b>PS-AD2</b> <i>(Cont'd)</i>  Study Mission with Alan Robinson at Artel	<b>PS-HD5</b>  Training Lean Concepts through the Use of Lean Activities and Games	<b>PS-HD6</b>  How to Engage a Reluctant Workforce	<b>PS-HD7</b>  Lean in Support Services Functions --- Deploying a True Company-Wide Strategy of Excellence	<b>PS-HD8</b>  Tools...Not Rules
5:00pm	<b>See you at the networking gathering immediately after these sessions -- and tomorrow at the Summit !</b>					

# Pre-Summit Workshop Descriptions

## All Day Workshops – 8 hours (8AM-5PM)

### **PS-AD1: Lean Champions: Maximize Business Performance through Lean, Six Sigma, and Team Performance Improvement**

Thomas Barto, Program Manager, TMG, Inc.

Joe Barto, Program Manager, TMG, Inc.

Learn how to Lead High Performance Teams by aligning and executing a Lean, Six Sigma, & Team Performance Improvement strategy to increase profit year over year.

As we recover from the economic recession, business is under increased pressure to deliver better products at a cheaper price with higher quality. High Performance Organizations are leveraging their current workforce by driving innovation throughout the entire organization. This workshop will teach you how to implement Lean, Six Sigma, and Team Performance Improvement systems to achieve the growth goals of your organization.

This presentation will focus on 3 major topics:

- Lean (War on Waste),
- Six Sigma (War on Variability), and
- Team Performance Improvement (Leader Development).

We will discuss Best Practices from organizations that have successfully integrated these 3 areas of training to engage their teammates, improve leader behaviours, and improve business performance. Attendees will receive a Leader Toolkit they can use to implement these principals with their teams when they return to work.

Every business can be a Dream Team of engaged, high performing leaders who understand how to both improve team performance and use Lean, Six Sigma, & Daily Problem Solving Tools to truly create a business where respect for people is more than just a sign on the door.

- Learn how the best Teams; Dream Teams, seem to so naturally and seamlessly boost productivity, bottom-line performance and employee engagement to enable the use of the Lean Six Sigma tool set make more money year over year; regardless of top line revenue.
- Benchmark and learn how to align your organization, improve leader behaviors, improve team engagement, and improve daily execution to attain consistent near perfect performance measured by greater bottom-line earnings.

You will –

- ✓ Learn about Best Practices from several organizations,
- ✓ Receive a Leader Tool Kit you can implement with your own teams, as well as an overview of the Theory of Engagement and Team Performance Improvement, and
- ✓ Receive training on how to successfully implement Lean and Six Sigma systems to improve processes and maximize business performance.

## **Thomas Barto**

Program Manager, TMG, Inc.

Tom joined the TMG Team in April 2011 and has served as Project Lead and Program Manager helping to deliver world class programs for our Partners. TMG, Inc. is a values-driven Program Management Services Company dedicated to improving leader behaviors, increasing team engagement, and building high performance teams since 2002. TMG provides its partners with World Class Expertise, Flawless Execution, Self-Governing Program Management, In-Process Agility and an unwavering focus on solving the “Big Picture” Problem. We win only when our partners win!

As a Program Manager for TMG, Tom has been working with partners across all industries to implement Team Performance Improvement Programs, Talent Acquisition and Retention Systems, as well as Lean and Six Sigma Training & Certification Programs. Tom has been involved with programs for many TMG’s Partners since 2011 including Rock-Tenn, StandFast Packaging, Mar-Bal, Inc., TESCO, Arconic Hampton Castings, Arconic Dover Castings. He also served as Program Manager for TMG’s Vet-STRONG Program, a National Public/Private Partnership focused on training employers across the country how to recapitalize their workforce by recruiting transitioning Veterans and serving Guard and Reservists. Tom also served as the Program Manager for the Commonwealth’s Virginia Values Veterans (V3) Program from its inception in 2012 through February 2014. The V3 Program was awarded with the 2013 Virginia Commonwealth University Innovation in Government Award.

Tom received his ASQ Green Belt Certification in 2015 and a Bachelor’s Degree in Philosophy with a concentration in Values and Professions and a Spanish Minor from Christopher Newport University in 2005. Tom was also a Contracts Manager from 2006 to 2011 working for Government Contracting firms Apptis, Inc., Serco-NA, and Qivliq, LLC., managing millions of dollars’ worth of contracts and subcontracts for both Federal and State Agencies including DoD, DoL, DHS, and all branches of the Armed Forces.

## **Joseph C. Barto IV**

Program Manager, TMG, Inc.

Joe Barto has been a member of the TMG Team since January 2007 and was certified as a Lean Six Sigma Black Belt by the United States Navy on 29 August 2009. TMG is a values-driven Program Management Services Company dedicated to Continuous Improvement. TMG provides our partners with World Class Expertise, Flawless Execution, Self Governing Program Management, In-Process Agility and an unwavering focus on solving the “Big Picture” Problem. We win only when our partners win.

Throughout his career, Joe has led Continuous Improvement, Leader Development, and Talent Acquisition and Retention projects for clients such as Ball Metal Beverage Packaging, BAE Systems Ship Repair, Earl Ship Repair, MHI Ship Repair, The United States Army’s Distributed Learning Program, Busch Vacuum Pumps and Systems, the Kimberly-Clark Corporation, and MAR-BAL Inc. He

has also participated in projects at STIHL, Oceaneering, JCI Metal, Cangene Pharmaceuticals, and North Florida Shipyards.

Before TMG, Joe worked as a Shipfitter at the Newport News Shipyard. He participated in the construction of the USS George H.W. Bush (CVN-77) as well as several vessels in the Virginia Class Submarine Program, most notably the USS North Carolina (SSN-777).

Joe is currently serving as a Program Manager with TMG and is a member of the Hampton Roads Quality Management Council (HRQMC) and the Association for Manufacturing Excellence (AME).

## **PS-AD2: Study Missions with Alan Robinson**

Alan Robinson, Author (Ideas are Free/The Idea-Driven Organization), Educator and Summit Opening Keynote Speaker

**This is an *exciting, not-to-be-missed opportunity* to observe how Lean is being implemented at two thriving companies in the greater Portland area and to learn from Alan Robinson's expert observations and consultation with each organization.**

**Remember that Lean concepts, principles, and methods are generic and apply across all sectors, whether you're in government, manufacturing, or services -- so, be prepared to integrate all you learn here and apply it to yourself and your organization.**

**Two on-site study missions will be conducted:**

1. **Jotul North America in the morning (8am-Noon)**, Address: 55 Hutcherson Dr, Gorham, ME 04038, Phone: (207) 797-5912

Jøtul is one of the world's oldest international producers of stoves, inserts, and fireplaces. Building on a proud Norwegian heritage, it has combined fine craftsmanship with the art of coping with the cold for 160 years.

2. **Artel- in the afternoon (1-5pm)**, Address: 25 Bradley Drive, Westbrook, ME 04005, Phone: (207) 854-0860

Quality, Productivity and Compliance with a Global Standard: Serving the laboratory community with exceptional products and services since 1982, Artel is the worldwide leader in liquid handling quality assurance. Beyond providing fast and easy-to-use liquid handling verification and calibration systems, it offers value-added services to help customers ensure the quality, productivity and compliance of their laboratories.

3. **And then, immediately after, be sure to go to the gathering back at the Holiday Inn by the Bay. Networking and delicious hors-oeuvres!**

## **Agenda:**

Study missions usually follow an agenda, developed with the host company beforehand and with the host in charge, such as –

- Company Overview & its Lean Journey and experience/lessons learned,
- Going to the gemba, and
- Follow-up discussion/consultation after the gemba walk.

*Note: While this may seem an obvious thing to say, it is very important not to be late, so participants need to be very careful about getting to the company in time to settle in. And bring your own coffee, bottles of water, etc.*

*This is open only to those registering for both days of the Summit. The number of participants will be quite limited -- first-registered, first accepted. A box lunch will be provided between the two study missions. Upon acceptance, for those needing transportation from and back to the Holiday Inn, contact Lita Klavins (207-458-7601, [btc.imp207@gmail.com](mailto:btc.imp207@gmail.com)).*

## **Study Mission Purpose:**

1. To develop an idea-driven, continuous improvement Lean mindset.
2. To experience the practical application of the theory. Look at what the theory says and begin to draw conclusions about what's possible for your own organization.
3. To see that a transformation is possible within one's own organization, that the methods for achieving that transformation are doable, and that you can lead it and be part of it.
4. To increase your management/leadership competencies and confidence.
5. To study a range of implementation strategies & practices that resulted in various performance outcomes and assess their relevance for your organization and yourself.
6. To prepare yourself to teach what you have learned.

## **Requirements:**

- Open: I am open to learning.
- Prepare: I am willing to make the investment to be prepared to listen, observe, and work when I get to the site. I have organized my thoughts and intent.
- Engage: I will extend myself, allowing the "host" and Alan Robinson to share, disclose, risk, tell their truth for an authentic conversation. An intentional non-judgmental exploration.
- Observe: I will see deeply, intentionally, with all my senses – in an active process.
- Teach: I will synthesize, document, and apply what I learn.

# Dr. Alan G. Robinson

Lean Champion, Educator, and Author

Alan Robinson specializes in managing high-performing organizations, creativity, ideas, innovation, and lean production. He is the co-author of ten books, many of which have been translated into more than twenty-five languages. These include --

- ***Corporate Creativity***, co-authored with Sam Stern, was named “Book of the Year” by the Academy of Human Resource Management, and was a finalist in the Financial Times/Booz Allen & Hamilton Global Best Business Book Awards.
- His book ***Vos Idées Changent Tout***, co-authored with Isaac Getz, has been translated into six languages. In his preface to the German edition of this book, Heinrich von Pierer, President and CEO of Siemens AG, called this “an important book on a topic that is fundamental to every business.”
- According to the Society of Manufacturing Engineers (SME), ***Modern Approaches to Manufacturing Improvement***, his 1991 book with Shigeo Shingo, who was one of the developers of the Toyota Production System, “remains a must-read for anyone interested in lean production.”
- Robinson’s book ***Ideas Are Free***, co-authored with Dean Schroeder, was based on a global study of more than 150 organizations in 17 countries. It describes how the best companies go about getting large numbers of ideas from their front-line employees, and the competitive advantages they gain from this. The book was named Reader’s Choice by Fast Company magazine and one of the 30 best business books of 2004 by Soundview Executive Books, and was featured on ABC World News and CNN Headline News. A syndicated small business columnist for Scripps-Howard, Paul Tulenko, wrote about *Ideas Are Free*: “I rate this book 5 1/2 stars, a first in this category. It’s that powerful. Only The Bible and the U.S. Constitution receive 6 stars.”
- His latest book, ***The Idea-Driven Organization***, also co-authored with Dean Schroeder, is the sequel to *Ideas Are Free*, and is the result of more than five years of further research in an entirely new set of organizations. The book was named the best book in 2014 on Management and Leadership by USA Book News, and won the 2015 Beverly Hills Book Award in the General Business Category. According to #1 New York Times best-selling business author Marshall Goldsmith, *The Idea-Driven Organization* is: “...so reasonable that the magnitude of its change message is easy to miss. The richness of the examples from all over the world make it fun to read and the authors convincingly demonstrate the power of incorporating front-line line thinking into your organization.”

Alan Robinson has advised more than 300 companies in twenty five countries on how to improve their performance. (You can find the complete list on his web page, [consulting page](#).)

Over the years, his research has been written about in almost every major newspaper in the United States, including The Wall Street Journal, The New York Times, The San Francisco Chronicle, The Chicago Tribune, and The Washington Post, as well as a large number of business publications, including The Economist, Business Week, Inc., Fortune, Investor’s Business Daily, Forbes,

Entrepreneur, Harvard Management Update, and Fast Company. He has been interviewed on numerous local and national radio and television shows, including National Public Radio, CNN, CNN Headline News, **Business Unusual** with Lou Dobbs, **ABC World News** with David Muir, and CNBC's **Powerlunch**. He also co-hosted a two-hour show on innovation for PBS/The Business Channel.

He has served on the Board of Examiners of the United States' Malcolm Baldrige National Quality Award and on the Board of Examiners for the Shingo Prizes for Excellence in Manufacturing. He is on the faculty of the Isenberg School of Management at the University of Massachusetts. He has also taught at St. Petersburg Technical University in Russia, the Athens Laboratory of Business Administration in Greece (affiliated with INSEAD), the Jagiellonian University in Poland, the University of Porto in Portugal, the Hanoi Business School, and Tianjin University in China.

He received his Ph.D. in applied mathematics from the Whiting School of Engineering at Johns Hopkins University, and a B.A. and M.A. in mathematics from the University of Cambridge.

# Morning Half-Day Seminars -- 4 hours (8AM-Noon)

## **PS-HD1: Daily Management - A Toolset for Communication and Collaboration**

Wade Kierstead, Manager, Innovation, Improvement, and Technology,  
City of Fredericton, New Brunswick, Canada

Nina McCarthy, Facilitator, City of Fredericton, New Brunswick, Canada

Daily Management contributes to a culture of Continuous Improvement by ensuring all employees understand the metrics, have the opportunity to explain and understand roadblocks being encountered, and collectively generate ideas to deal with issues as they arise. It ensures ideas are captured, assigned, and actioned, that employees are aware of upcoming work and events, and successes are celebrated. This workshop will empower participants to take Daily Management and apply it to their own organization and workgroups.

The City of Fredericton has been using Daily Management for three years as a toolset for two-way communication within workgroups, and is expanding to Departmental roll-ups and a CAO Dashboard. This presentation will cover the pillars of daily management, how they work and integrate together, and descriptions of some of the 59 boards in use at the City. There will be general discussion on what has contributed to the success in various areas and styles of board, and how to give freedom to customize within standardization requirements. This workshop will follow up on its 2016 Summit session by presenting the same basics but also discuss using organizational and top-level boards, with opportunity for participants to design their own workplace Daily Management practice with input from the team.

The workshop begins with a presentation on the components of Daily Management, explaining the three pillars: Daily Huddles, Visibility Boards, and Standard Reporting / Leader Standard Work. Various sample formats of boards will be presented, with the merits of each discussed. Participants will work in small groups to mock up Visibility Boards applicable to their own work places, personalized to their needs. By then simulating daily huddles at each board, participants will see what works best for their situations, and be able to take the information back to their work place for implementation.

## **Wade Kierstead**

Manager, Innovation, Improvement, and Technology,  
City of Fredericton, New Brunswick, Canada

Wade Kierstead is a Lean Six Sigma Black Belt and leads fifty-three belts on the City of Fredericton's journey of Continuous Improvement. With experience in Staffing to Demand, Daily Management, Lean Six Sigma, and other methods and tools, the Continuous Improvement team is redesigning how the City operates from the ground up.

With Fredericton as a moving force, the second *Canadian Public Sector Lean Summit* was held this

past April in Fredericton and was quite a success with broad participation, including from the private sector.

Wade's journey with the City spans twenty-one years and includes being Supervisor of IT Infrastructure, Systems Architect for the City of Fredericton's fibre and wireless carrier e-Novations, a Lean coach and champion, and now Manager of Improvement and Innovation. Previously, Wade worked with Unisys in New Brunswick, and IBM Canada in Toronto, Ontario.

## Nina McCarthy

Process Improvement Facilitator, Innovation, Improvement, and Technology Division  
City of Fredericton, New Brunswick, Canada

Nina McCarthy is a Black Belt in Lean Six Sigma with the City of Fredericton, New Brunswick, Canada and is currently seconded to the Innovation, Improvement and Technology Division as a Process Improvement Facilitator.

Her primary work is with the Fredericton Fire Department where she is a Lieutenant with the Fire Prevention and Investigation Division. She has been with the City for eighteen years and prior to working as an investigator, spent six years as a firefighter in the Suppression Division.

Nina has a BA in Criminology and is currently working on her MPhil in Policy Studies.

### **PS-HD2: Becoming an Effective Communicator by Connecting with Others**

Amy L. Modglin, Founder/Chief Inspiration Officer, Modglin Leadership Solutions

Everyone struggles with effective communication; at home, at work, and with family and friends.. Communication is a two-way exchange between people. Often the message is not clear, or is grossly misunderstood. This results in missed opportunities, conflict in the workplace and dissension among colleagues.

To use a Lean mindset of continuous improvement, we must make a concerted effort to learn how to connect with people, not just communicate "at" them. Connecting with others helps us become better communicators, gets people to listen to us and provides inspiration to those around us.

For Lean practitioners, going into an organization and getting them to buy in to the Lean culture and the change it takes to get there requires the ability to connect with others so that your communication is heard, accepted and that your ideas are endorsed. Only one thing stands between you and success. It's not experience or talent. It is the ability to turn communication into a powerful connection.

In this transformational workshop, you will learn:

- To understand the value of connecting with people
- Identify with others and increase your influence

- Identify your connecting strengths
- Be yourself and build on your strengths
- How to get people to listen to you
- Ask for feedback about your connecting style
- Practice connecting with others

You will leave with new skills and tools that you can use immediately. They do not require study or memorization, just self-awareness and intentionality. People around you with whom you communicate everyday will be amazed at your transformation.

## **Amy L. Modglin, MA, SSGB**

Founder/Chief Inspiration Officer, Modglin Leadership Solutions

Amy Modglin is the Founder and Chief Inspiration Officer of Modglin Leadership Solutions. She has a BS in Organizational Leadership and Management, an MA in Organizational Leadership: Coaching and Mentoring, and holds a Six Sigma Green Belt certification from Old Dominion University.

She is also a certified Coach, Speaker and Trainer with the John Maxwell Team. Amy has had a successful career in healthcare, both on the patient care side and with leading and transforming teams, people and organizations. She has led several successful Lean transformations while serving in the US Navy and in large healthcare organizations.

Amy is the Founder and Chief Inspiration Officer of Modglin Leadership Solutions which offers an array of leadership and soft skills training for adults and youth. She also coaches professionals throughout the world.

### **PS-HD3: Sustaining Success**

Scott Gauvin, CEO, Macresco, Inc.

Even the most modest performance initiatives involve a degree of change. And the ease, success and sustainability of that change has everything to do with how it's perceived and the culture in which it's introduced.

Though the customer is king, your employees hold the keys to the kingdom. Yet, employee engagement and company culture continue to be among business' most misunderstood, underestimated and elusive performance drivers. You will learn --

- Why Lean process without employee engagement fails 95% of the time.
- Real world examples of how to put in place the cultural enablers upon which successful CI depends: Lead with Humility, Respect Every Individual, Assure a Safe Environment, Develop People, Empower and Involve Everyone.

What is Respect for People? This workshop aims to demystify the complex undertaking that is "the people side of Lean" with real world examples of how to manage change in context and

affect the behaviors and attitudes that drive engagement and enhance performance.

You will understand --

- How leaders get motivation wrong.
- Seeing change through the process to the organizational structure.
- Moving past haphazard attempts to address engagement to involve your people.
- The four simple things your employees need from you to enhance performance.
- How common organizational governance innocently undermine these cultural enablers every day.

## Scott Gauvin

CEO, Macresco, Inc.

Scott is a seasoned change agent with over 22 years' experience, successfully helping organizations realize their potential. Throughout his career, Scott's focus has been on driving performance gains through organizational alignment and a progressive approach to operations strategy. He has advised companies the world over and across a wide range of industries including pharmaceuticals, biotech, consumer goods, medical devices, agriculture, packaging and industrial manufacturing.

In addition to driving the growth of Macresco's consultancy practice, Scott counsels client organizations in transition and is most often involved in strategic endeavours that include assessing a company's capabilities and capacity for change as well as innovating underperforming business models to improve market opportunity.

Prior to launching Macresco, Scott was a business management consultant and began his career in the tech space specializing in systems design and architecture. He holds a BA from the University of Massachusetts, an MBA from Boston University and is a Six Sigma Black Belt. Scott is also a frequent speaker and has presented for the American Society of Quality, The Shingo Conference, The Association for Manufacturing Excellence, Fabtech, Vistage and Boston University School of Management among others.

### **PS-HD4: "Getting" Lean – An Interactive Simulation**

Fred Shamburg, President, Leanovations, LLC

Kimberly Cunningham, Vice President, Leanovations, LLC

No matter what your Lean experience, knowledge, or practice level is (beginner or experienced practitioner), this is a "don't miss" workshop!!! It will be an experiential "eye opener" for even the most experienced Lean practitioner- all that's needed is a mind open to new ideas and learning new concepts. Everyone who attends will leave with an abundance of new Lean learning and will walk away knowing how to implement a Lean Learning Organization and having the ability to develop a high performance workplace, where the employees are engaged and empowered to pursue continuous improvement.

Back by popular demand, this Nerf Ball Factory simulation is a very fun hands-on learning experience and an ideal introduction (or broadening) to Lean Manufacturing and the Toyota Production System principles that can be applied in any enterprise (Manufacturing, Healthcare, Government, Service and etc.). You will learn the basic Lean principles, elements, and techniques and how they interact to help an organization grow.

You will be part of operating a simulated “factory” and then redesign through two (2) short kaizen team events with newly learned Lean principles. You will create a value stream for the current and future states, and then operate the new factory and measure the key performance indicators and experience the improved results. You will learn the 5 Key principles of the Toyota Production System (TPS), the importance of Standard Work, developing employee skills, having Key Performance Indicators (KPIs), and experiencing the Kaizen Team approach to improve processes.

You will literally see the “opportunities” and how critical Lean Leadership is to the organization’s success. And, you will learn, among other things, the importance of eliminating wastes to create flow where possible and pull where flow is not possible, along with the value of a visual factory.

This workshop will provide the emotional and intellectual framework for understanding Lean. You will explore leadership issues in the context of Lean Transformations and other situations where radical change in behaviour and culture is necessary.

## **Fred Shamburg**

President, Leanovations, LLC

Fred Shamburg, founder and President of Leanovations, LLC, was introduced to Lean by one of the originators of the “Toyota Production System” who worked directly for Mr. Ohno at Toyota. He very quickly developed a passion for teaching and applying Lean principles to the total business enterprise and has now over 25 years’ experience in leadership and executive level positions for multinational corporations.

His experience embraces working with organizations in diverse industries that include aerospace, medical, automotive, chemicals, government and service organizations.

The Board of Examiners for the National Shingo Prize selected Fred as a Shingo Prize Examiner in 2007. A frequent guest speaker at business and government conferences, Fred has taught Lean worldwide and in all regions of the U.S., with experience in over 20 countries and 30 states. He has been recognized as an international leader in successfully implementing Lean and Innovations, where Lean plus Innovations equals *Leanovations*.

# Kimberly Cunningham

Vice-President Lean ISO Integration, Leanovations

Kim is an ASQ Certified Quality Auditor who has over 15 years of experience in Lean and Quality as a Lean-ISO Quality Consultant, ISO quality assurance auditing, Quality Manager and Manufacturing Engineer.

She has a broad spectrum of experience with multiple standards and regulations across various industries. Kim has implemented and improved Lean-ISO Quality Management Systems in support of a Lean transformation with numerous companies. Her work has included guidance through certification process, on-going ISO maintenance documentation, Lean/ISO training, process mapping, process validation, internal auditing, supplier auditing, and standard work development.

Kim's manufacturing and healthcare background and problem-solving skills complement her quality experience in evaluating companies and identifying areas of improvement. She has worked extensively with organizations on implementations and certifications of ISO9001, ISO13485, ISO14971, ISO17025, AS 9100, and ISO/TS 16949 along with providing Internal auditing and training to the ISO9001, AS9100, ISO13485, FDA CFR Title 21 Part 820 and 211, ISO14971 and GMP requirements.

## Afternoon Half-Day Seminars -- 4 hours (1-5PM)

### **PS-HD5: Training Lean Concepts through the Use of Lean Activities and Games**

Anne Frewin, Lean Six Sigma Leader, IDEXX Laboratories, Inc.

Daniel Pfenndt, Operations Manager – Slide Manufacturing, IDEXX Laboratories

Learning by doing is one of the best ways to understand Lean concepts. This is your opportunity to learn techniques that can be of use to you in your own Lean practice and understanding and, even more, to use in developing a Lean understanding and culture in your teams and in your organization.

At IDEXX, through extensive experience, we have found and refined a number of instructional activities that help individuals and teams learn about and use Lean concepts and methods such as–

- 5S,
- One-Piece Flow,
- Poka Yoke,
- Continuous Improvement,
- Etc.

During this four-hour session, you will –

- Learn through experiencing some of the games/activities, and, importantly, also
- Receive facilitator instructions so that you can take the activities back to your facility and start engaging your teams.

## Anne Frewin

Lean Six Sigma Leader, IDEXX Laboratories

Anne Frewin recently joined IDEXX as the Lean Six Sigma Leader supporting IDEXX Operations and Corporate.

As a Lean Leader she spends much of her time training teams on Lean concepts, coaching, and mentoring other Lean leaders, and facilitating Rapid Improvement Events (RIPs). Prior to joining IDEXX she was the Director of Process Improvement at Central Maine Healthcare for four years.

She 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. She has presented previously at the Lean Systems Summit, GBMP national conference, and Truven Health Analytics User Conferences.

## Daniel Pfendt, LBC

Operations Manager – Slide Manufacturing, IDEXX Laboratories

Dan is Operations Manager for Slide Manufacturing, a relatively new department, at IDEXX Laboratories in Westbrook, Maine. As Operations Manager, he has ensured that Lean principles are a part of the department's culture as it continues to grow.

He began at IDEXX in 2012 as an Advanced Manufacturing Engineer, where he developed and launched assembly lines for IDEXX instruments. Prior to coming to IDEXX Laboratories, he spent 12 years at Ford Motor Company and Visteon, where he was introduced to Lean concepts and manufacturing process launches. During this time he learned various aspects of operations through experiences as a Manufacturing Engineer, Production Supervisor, and Industrial Engineering Manager.

Dan is Lean Bronze Certified by the Society of Manufacturing Engineers. He has a Master's of Science in Operations Management, and Bachelor of Science in Mechanical Engineering from Kettering University in Flint, MI.

## PS-HD6: How to Engage a Reluctant Workforce

Paul Critchley, CEO, New England Lean Consulting

In order to properly practice Lean, you must first Engage Your Workforce. Yet one of the biggest challenges with Lean can be overcoming a reluctant workforce. Engaging your workforce can be a delicate balancing act at any point but especially if you are just beginning your Lean journey after

years of “but we’ve always done it this way”.

We will discuss the most popular objections that you may encounter when beginning (or continuing) your Lean journey. These can come from all levels of the organization - from the CEO to the janitor. The most popular objections will be discussed, including those you may have encountered, then how those objections typically stem from 1 of 3 possible areas. We will delve into examples from each and teach you how to address them. You will learn how to “speak in your customer’s language” in order to garner support for a Lean culture change and how to create an environment that is primed to enjoy a successful Lean implementation.

You will learn techniques on how to work with people in each type in order to overcome objections and build a Lean culture. In breakout groups, teams will take a “scenario” and develop a response to a Lean objection from a certain level of the organization.

Understanding the reasons why people may be resistant to implementing Lean principles and what you can do to address and overcome these concerns positions you for Lean success.

## **Paul W. Critchley**

CEO, New England Lean Consulting

Paul Critchley is the President and Primary Lead Consultant for New England Lean Consulting.

He has enjoyed a successful career implementing Lean in a variety of industries including Automotive, Medical Devices and Aerospace. He has used these abilities to lead numerous continuous improvement and organizational change events that have saved companies millions of dollars, improved quality, and increased employee satisfaction scores.

Paul has been recognized within industry as an expert on employee engagement and management interaction, and has won awards for his ability to implement positive change within organizations. He is a co-author of “The Whole Professional, A Collection of Essays to Help You Achieve a Full and Satisfying Life”.

Paul holds a B.S.M.E from Clarkson University, a M.S. Management from Rensselaer Polytechnic Institute and a M.S. Organizational Leadership from Quinnipiac University.

### **PS-HD7: Lean in Support Services Functions - Deploying a True Company-Wide Strategy of Excellence**

Catherine Converset, President, Productivity Europe and Executive Partner,  
Productivity Inc. and Productivity Lean Services, Inc.

Most industrial companies have been engaging in Lean and TPM activities in their manufacturing operation for several years and their efforts have paid off with increases in product reliability,

reductions in lead times, and reductions in overall costs.

But chances are the gains achieved in manufacturing are being offset by inefficiencies in other organizational functions. To get the most from your Lean effort, it is imperative that all company functions – HR, R&D, Finance, Marketing, etc. -- challenge their processes.

Far from being merely a set of tools or projects, Lean is a journey, based on trust and teamwork, where traditional hierarchical relationships give way to one of joint commitment and accountability, where everyone in the organization is working towards a shared vision, towards flow management and efficient processes. While not hard to understand, this approach is often difficult to implement. It requires the development of new perspectives and management routines up and down your entire value chain. It is a dynamic and organic journey which will lead your organization to better develop and utilize its human talents and its ability to learn, innovate and reliably and continually meet customers' expectations.

Implementation of the Lean techniques described in this session can:

- ⇒ cut work backlogs by as much as 80%.
- ⇒ reduce design engineering time-to-market by as much as 75%.
- ⇒ decrease processing times by 50% or more.
- ⇒ drastically reduce failure demand\*.
- ⇒ eliminate overtime.
- ⇒ improve staff morale and customer satisfaction rating.
- ⇒ increase capacity - take on more work without adding resources.

In this case-based workshop, we will follow one organization's Lean journey of an Operational Excellence implementation in support services – from issues to outcomes – demonstrating how the principles of Lean can be applied to make a positive impact up and down the extended value chain:

- The company context and business challenges
- The steps of implementation
- The different process improvements and changes achieved in marketing, quality, HR, and sales and their overall benefits
- The positive improvement spiral and the performance management system
- The leadership role, and
- The Lessons learned and next steps

You will gain an understanding of key operational excellence principles applied to support services and learn --

- To implement an organizational operational excellence strategy.
- How the application of Lean techniques in Marketing, Quality, R&D, HR, Sales and Finance, drives the organization to a new culture and a quantum leap in performance.
- To tie improvement initiatives to organizational goals.
- How the importance of establishing leadership routines ensures sustainment.

# Catherine Converset

President, Productivity Innovation Europe and  
Executive Partner, Productivity Inc. and Productivity Lean Services, Inc.

Upon graduation from the *Ecole Supérieure de Commerce de Paris* (ECSP), Ms. Converset successfully held positions within the PECHINEY group in Italy and France, becoming worldwide export manager of aluminum products for Pechiney Rhenalu and then director of packaging development for the Pechiney Group. After ten years at Pechiney, she spent five years managing a plastic packaging activity in Italy.

Ms. Converset joined Productivity in 1994. Following extensive Lean and Six Sigma training in the USA, she became a partner of Productivity in France, then in Europe and the USA. She is now President of Productivity Innovation Europe and Executive Partner of Productivity Inc.

Her areas of expertise include:

- Lean training and support for Executive and Management teams, with vision, objective and roadmap definition.
- Policy Deployment (Hoshin Kanri).
- Lean management system implementation strategy.
- Management and leadership training.
- Lean in pharmaceutical environment (manufacturing, CMC&E) and R&D.

Ms. Converset has developed a deep understanding and practical experience in the execution of Lean transformation in all business environments. She is experienced in guiding Executive Committees in defining operational and strategic objectives and building management and organizational systems. She has acquired extensive experience implementing Lean in pharmaceutical, process, and R&D environments.

Fluent in French, English, and Italian, she also teaches Lean Management in Service Industries at the Center for Operational Excellence at the Ohio State University.

## **PS-HD8: Workshop Tools...Not Rules**

Mark Adams, Senior Engineering Services Manager, Flex

We are all mechanics -- mechanics of broken and/or under-performing processes that is. Regardless whether we are a team leader or facilitator for Kaizens, a change agent and/or program manager, a practitioner, or someone simply interested in learning more.

Our tool box consists of Value Stream Mapping, Root Cause Analysis, Standard Work, and the like. However, any effective mechanic will tell you that each tool has a purpose, and each mechanic may use the tool differently depending on the task at hand.

Yet, many of us process mechanics treat these tools as rules. We follow them blindly and try to use as many as possible, even if the task doesn't require it.

Based on years of continuous improvement experience for organizations that include healthcare, MRO, military, and manufacturing, you will learn how to best use these tools to achieve greater success. This workshop will help fellow change agents to understand these are tools, not rules, and therefore, recognize the problem, culture, and other aspects of the environment to help wield and adapt the tool to best fit the job.

The workshop will showcase how these tools have been adapted over the last 8 years, as well as the “Promising Practice” for Kaizen Standard Work which will aid a practitioner to know what tools to use and when.

This workshop will

- Review previous initiatives and show failure of those initiatives.
- Walk through how we applied Lean to our Lean initiatives in terms of Kaizen execution and Green Belt development.
- Show how we unfroze the frozen middle, and put ownership (vs typical delegation) back into the champion.
- Review, additionally, tools that have been adapted to fit the environment to include my Tailed Fishbone, Tailed Fishbone applied to the Premortem, and the Solution Model, and finally,
- Recommend which tools to use and when, in a Kaizen.

You will leave knowing that tools can be adapted to better fit their problem, environment, and their own skillset and comfort level.

A participant in this workshop should have experience as a team leader or facilitator for Kaizens. Additionally, a change agent and/or program manager will also find value.

## Mark Adams

Senior Engineering Services Manager, Energy Division, Flex

Mark is a process improvement enthusiast who has been facilitating the change management process for almost a decade. Mark has facilitated strategy deployment and continuous improvement supporting industries such as Manufacturing, Training, Operations, Aerospace, Solar/Energy, Recruiting, Maintenance, Medical and other diverse fields. His passion lies in teaching and coaching continuous improvement that fits into an organization’s culture and needs.

Currently, Mark serves as the Senior Engineering Services Manager in the Energy Division of Flex, with responsibility for Quality, Compliance, and Continuous Improvement of Flex's Energy Solutions \$2B/year portfolio which includes its Energy Sketch to Scale, Flex Living & NEXTracker business units.

Additionally, Mark continues to serve the United States Air Force as the Strategy and Continuous Improvement Manager for the 445th Maintenance Squadron in the US Air Force Reserves stationed at Wright-Patterson Air Force Base.

Mark earned his Lean Six Sigma Black Belt through the United States Air Force in partnership with the University of Tennessee Center for Business Excellence. He holds a Bachelor of Science degree in Management from Wayland Baptist University.