

# 2018 LEAN SYSTEMS SUMMIT

## PRE-SUMMIT WORKSHOPS

AUGUST 9, 2018

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 #4	Room #5
8:00am – Noon	<b>PS-AD1</b> Coaching Those Who Are Not On Board, In Denial or “Addicted to the Status Quo” and Actively or Passively Resisting Change <i>(Continued below)</i>	<b>PS-AD2</b> Lean 101 for Services – Simulation (including government, education, service orgs, retail, and support functions in any organization) <i>(Continued below)</i>	<b>PS-AD3</b> Improving Flow and Reducing Risk Through Utilization of Lean Six Sigma Tools <i>(Continued below)</i>	<b>PS-AD4 a</b> Measuring to Succeed <u>Session 1:</u> Why measure and what to measure <u>Session 2:</u> How to measure for more effective decision-making and goal-setting	<b>PS-HD1</b> Introduction to Total Productive Maintenance
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 (Cont'd)</b> Coaching Those Who Are Not On Board, In Denial or “Addicted to the Status Quo” and Actively or Passively Resisting Change	<b>PS-AD2 (Cont'd)</b> Lean 101 for Services – Simulation (including government, education, service orgs, retail, and support functions in any organization)	<b>PS-AD3 (Cont'd)</b> Improving Flow and Reducing Risk Through Utilization of Lean Six Sigma Tools	<b>PS-AD4 b</b> Measuring to Succeed <u>Session 3:</u> Building and using tiered visual management systems <u>Session 4:</u> Measuring for leader development & high-speed problem solving	<b>PS-HD2</b> Stoking for Competitiveness Drive & Survival Instincts of the “First-In-Class” President/CEO/Leader
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: Coaching Those Who Are Not On Board, In Denial, or “Addicted to the Status Quo” and Actively or Passively Resisting Change

Ron Oslin, Chief Executive Officer, AML Sentinel Corporation

Many coaches and leaders are frustrated with the progress of their transformation. They find their people are complying and doing as told vs. engaging and experimenting. This workshop teaches leaders and coaches how to get more than just people's hands engaged; the workshop teaches how to get people's hearts and minds engaged so they become advocates for change.

The workshop is a full-day skill-building practicum. Participants will cycle through learn-do-practice all day. This session is design to teach each participant how to effectively meet another person (leader or associate) where they are and assist the person to work through the stages of change so that they may become an advocate of the change.

Participants will cycle through learn-do-practice all day. This session is design to teach each participant how to effectively meet another person (leader or associate) where they are and assist the person work through the stages of change so that they may become an advocate of the change. Participants will work in dyads and triads all day. They will practice real conversations in role practice. We do not do any role play. All practice conversations are about real events in the participants' lives.

You will learn --

- How to assist a person get on board with the change.
- How break down active and passive resistance to change.
- How get beyond compliance behavior and get the engagement of the hearts and minds of your associates and leaders.
- How to recognize what stage of change a person is in & how to meet them where they are.

Participants will be given free access to the “MI – Coach’s Helper to facilitate behavior change” app to continue their learning and assist them in conversations with leaders and associates who exhibit the symptoms of “Addiction to the Status Quo”.

Please review this article describing the “Addiction to Status Quo” and the pitfalls of coaching those “Addiction to Status Quo”.

LINK to our article:

[http://onesystemonevoice.com/resources/TargetSummer15\\_LeanCoaching\\_Reprint.pdf](http://onesystemonevoice.com/resources/TargetSummer15_LeanCoaching_Reprint.pdf)

# Ron Oslin

Chief Executive Officer, AML Sentinel Corporation

Ron Oslin is a Chief Executive Officer at AML Sentinel Corp. AML Sentinel is a full service AML transaction monitoring and enhanced due diligence provider that delivers a comprehensive and affordable service solution to meet the growing AML threat faced by the financial industry.

Ron started AML Sentinel Corp. after retiring from Capital One in 2017 with more than 20 years of Lean application in manufacturing and service.

He began his process learning journey in 1982 as an intern with Dr. Edward Deming and honed his leadership skills as a leader at Toyota. Oslin has held roles as CEO, COO and transformation leader in several organizations and has applied Lean methodologies in printing, auto manufacturing, marine heating and air conditioning manufacturing, health care, education and banking. He specializes in organization change and transformation.

Oslin co-authored 'Motivational Interviewing and Lean Coaching' (Target magazine, 2015). He received his bachelor's degree from Virginia Commonwealth University.

## **PS-AD2: Lean 101 for Services – Simulation**

**(for government, education, service orgs, media, retail, & support functions in any organization)**

Maria Elena Stopher, President, Ultimate Lean, Inc.

Darlene Dumont, DBA, Public Service Program Director, Lean Enterprise Institute

Geared to government, education, service orgs, retail, media, and support functions in any organization, this workshop is an experiential hands-on learning for you to learn or refine your understanding of essential Lean principles in a real-life way. You will be able to directly relate these to your own working environment--to your systems, processes, and leadership behaviors.

It represents what these Lean management systems, processes and leadership behaviors look like in a service/support work environment, across diverse types of functions, fields, and sectors.

You will experience the transformation from batch, chaotic traditional thinking and processing to an environment where leaders and employees go home enriched and fulfilled by aligning their work to strategic priorities and winning with customers.

The concepts you will learn include--

- Strategy Deployment
- Lean Fundamentals
  - Pull
  - Standard Work
  - Mistake Proofing
  - Leader Behaviors
- Customer Value
- Balancing Work Load
- Flow Lean

## Maria Elena Stopher

President, Ultimate Lean, Inc.

Maria Elena is an award-winning lean practitioner and expert with demonstrated results in private business and government. She is recognized as a leader in Lean thinking in this country and abroad. Besides achieving dramatic gains in business performance, she breaks down barriers among team members at all levels, creating continuous improvement work cultures that support the open exchange of new ideas and elevate employee and customer satisfaction. She has adapted concepts and tools from Fortune 500 companies, demystified them, and made them accessible for application in smaller companies and in government agencies.

She started her career in continuous improvement in the late 1980's at Xerox Corporation and Danaher Motion (formerly American Precision Industries). Later, as director of National Lean Initiatives at the U.S. Department of Commerce, she established the first nation-wide, government-sponsored program to make manufacturers more competitive globally through lean management. Her vision to provide lean training nationally to businesses trained over 2,000 field engineers in 50 states and Puerto Rico. For this, she earned the Commerce Department's Bronze Medal.

Maria Elena also served as a senior advisor to the Office of the Under Secretary of the Air Force, where she advised senior leaders on establishing strategic performance goals and implementing continuous improvement initiatives, earning her the Air Force's Meritorious Service Award.

Maria Elena has a bachelor's degree in mechanical engineering and a master's from the State University of New York at Buffalo. She is the president and owner of Ultimate Lean, Inc.

## Darlene Dumont, DBA

Director, Public Service Program, Lean Enterprise Institute (LEI)

Dr. Darlene Dumont is currently the Public Service Program Director at LEI. She brings with her over 28 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 many processes and organizations and transferred the learnings to hundreds of people.

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.

## **PS-AD3 Improving Flow and Reducing Risk Through Utilization of Lean Six Sigma Tools**

Robert Cameron, Senior Consultant, Lean East

Steve Musica, President, Lean East

Every day processes fail to produce the intended results. The consequences of those failures can range from a minor annoyance, inconvenience, and rework to catastrophic customer, employee, and business losses, including injuries and death.

This interactive workshop will focus on creating a team understanding of the process, wastes, constraints, and potential failures at each step and how to assess and address the risks. The probability and severity of those failures and the existing likelihood that those failures would be detected or prevented before they create a larger problem will be examined. It will ask, “What can be done to improve the process flow and address those potential failure areas that are of the most concern but do not seem to currently have adequate risk mitigation in place?” and examine the flow improvement and risk mitigation that will improve safety and overall efficiency and effectiveness in any organization.

The workshop will look at some simple process flow and mistake proofing concepts that can be used by any team to reduce the likelihood of failure and improve the overall efficiency and effectiveness of the process.

Using a combination of presentation and interactive learning, the key concepts that will be taught and practiced are basic process mapping, Failure Mode Effects Analysis (FMEA), Root Cause Analysis, types of variation, and mistake proofing (Poka-Yoke).

You will be divided into small teams and will run a short simulation. Upon completion of the simulation, you will create a process map, identify wastes and constraints, and conduct Root Cause Analysis. The instructors will then demonstrate how to conduct a FMEA to identify the high-risk steps and develop some countermeasures using Poka-Yoke concepts. Subsequent runs of the simulation will be done to incorporate and assess the improvements.

## Robert Cameron

Senior Consultant, Lean East

Robert Cameron is a Senior Consultant with Lean East and a U. S. Navy-certified Lean Six Sigma Master Black Belt. Bob is a retired Naval Officer with a 33-year military career in the Navy and Naval Reserves. In his civilian career he has worked for Bath Iron Works (BIW) and most recently for the Navy Office at BIW where he was the Lean Deployment Lead for ten years. Responsibilities included advising Senior Leadership on process improvement and quality, planning and executing Strategic Planning efforts, conducting Value Stream Analysis, teaching Lean Six Sigma courses, mentoring of new Black Belts and Green Belts and developing a Lean/Quality deployment strategy in conjunction with strategic planning efforts.

Bob also served as a member of the Department of the Navy's Continuous Process Improvement (CPI) Executive Committee providing overarching guidance and working on national level CPI projects.

Bob has earned a BA in Industrial Technology from the University of Southern Maine and an MBA from Southern New Hampshire University. The American Society for Quality (ASQ) has certified Bob as a Lean Six Sigma Black Belt and Manager of Quality/Organizational Excellence. Bob is also a former adjunct faculty member of the University of Southern New Hampshire, where he taught a graduate level Course in Six Sigma Quality Management.

## Steven A. Musica

President, Lean East

Steven A. Musica is a Founder and the President of Lean East. He consults on improvement efforts that improve customer value while reducing costs. Steve has previous management and operational experience as President, CEO, COO, and VP, Operations for medical and technology companies and led successful Lean transformations for both medical device and manufacturing companies before founding Lean East in 2010. Steve learned Lean with some of the best in the world and now uses his knowledge and experience to help others transform their organizations.

Steve has over sixteen years of experience training operational best practices and instituting continuous improvement cultures that increase customer satisfaction and profitability and is certified by Dartmouth College as a Lean Six Sigma Black Belt. He earned a Bachelor of Science degree in Mechanical Engineering from the University of Maine with high distinction and high honors and a Masters in Engineering Management (MEM) degree from Dartmouth College.

Lean East facilitates transformations in service and healthcare organizations to improve outcomes while reducing costs. The team learned continuous improvement methods from some of the best organizations in the world and have led multiple successful transformations. Learn more at [www.LeanEast.com](http://www.LeanEast.com).

# PS-AD4 Series a & b: Measuring to Succeed

## Morning PS-AD4a:

**Session 1: Why measure and what to measure (KPIs)**

**Session 2: How to measure for more effective decision-making and goal-setting**

## Afternoon PS-AD4b

**Session 3: Building and using tiered visual management systems**

**Session 4: Measuring for leader development & high-speed problem solving**

David S. Veech, Senior Lecturer, The Ohio State University, Fisher College of Business

This workshop was designed so that each session is stand-alone so you can come for any one of them, or all of them, or any combination in between. As you will note, they are progressive and meant to flow naturally one to the other throughout the day, building upon each other and deepening and broadening your knowledge.

**Session 1: Why measure and what to measure:** In this session we will discuss a few overarching principles about Lean, improvement, and culture change that are enabled by effective measurement systems and what kinds of performance measures tend to be most useful in a variety of work settings.

**Session 2: How to measure for more effective decision-making and goal-setting:** In this session we will discuss specific metrics and algorithms and how they relate to an organization's strategic priorities.

**Session 3: Building and using tiered visual management systems:** In this session, we will focus on how to display different measures for different levels of the organization to achieve line of sight at each level toward a designated true north.

**Session 4: Measuring for leader development and high-speed problem solving:** In this session, we focus on developing leadership skills through an effective measurement system, tying together visual management, huddles, leader standardized work, gemba walks, and coaching.

Ideally, each session participant will be interested in learning how to implement a Lean culture, learning about Lean tools, and in starting out small so as to avoid overwhelming colleagues.

You will receive a .pdf with full-size slides they can use to help build their systems back at home.

# 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.

## Half-Day Seminars -- 4 hours

### **PS-HD1: Introduction to Total Productive Maintenance – Lean for Your Machines**

John Perrotti, III, CMRP, Vice-President, Fuss & O'Neill Manufacturing Solutions

Total Productive Maintenance is one of the Lean tools used as part of your continuous improvement efforts. Implementing TPM is working with the operators of your machines to develop a comprehensive asset maintenance strategy.

You will be introduced to Total Productive Maintenance (TPM) as a system that will help you put a plan together. We introduce TPM concepts and show creative solutions and best practices from other teams/industries. You will be introduced to a phased process which is a step by step plan to take your maintenance group and production equipment to the next level of operation. These are

do-able, bite size steps that will move your maintenance group forward while increasing the production output of your machines.

You will leave with an understanding of Total Productive maintenance, the 4 phases to zero equipment stoppages, and new tools, such as Overall Equipment Effectiveness (OEE) that they can use as part of their improvement efforts

#### SPECIFIC LEARNING OBJECTIVES:

- Identify two main causes for 80 % of equipment failures
- Evaluate equipment 5'S and understanding how 5'S ties directly into improved quality, set-up reduction, mistake proofing, etc.
- Analyze equipment condition
- Perform Overall Equipment Effectiveness (OEE) observations to baseline the effectiveness (capacity) of your equipment
- Strategically driving up the OEE% (capacity)
- Analyze equipment failure history
- Clean & inspect, and how they go hand-in-hand
- Calibrate eyes to locate safety issues/problems
- Develop countermeasures against contamination
- Develop countermeasures to make equipment more accessible
- Enhance Preventive Maintenance (quicker and more effective)
- Value measurements: temperature, sound levels, ultrasound, infrared, air speed, etc.

## John Perrotti, III, CMRP

Vice-President, Fuss & O'Neill Manufacturing Solutions

“When I was a child, I would always take things apart because I needed to understand how they worked. That early interest and passion to solve problems has been the foundation for helping my clients to improve. Improving both the efficiency of their manufacturing and the safety of their processes is what gives me the greatest satisfaction in my job.”

John is a Fuss & O'Neill Vice President and leads various disciplinary efforts for its Manufacturing Solutions group. He is an expert in reliability and has developed methods and approaches to evaluate systems for achieving maximum performance.

John believes in “hands – on” involvement and innovative team approaches to improve equipment effectiveness. He has led clients to improve the productivity and reliability of their manufacturing equipment. John has unique problem solving abilities and troubleshooting techniques. He has led the process of performing a Failure Mode and Effects Analysis (FMEA) as a tool to formulate a complete maintenance approach.

John has led many Total Productive Maintenance sessions. He has also performed training and support in Maintenance Manager 101, Troubleshooting Techniques, Set Up Reduction and Utilizing a Lean Approach to Safety. He is an expert in Overall Equipment Effectiveness and how to leverage it to prioritize the improvement effort process. He teaches for many MEP's throughout the Northeast as part of their Lean Certification programs. John has extensive knowledge within the metalworking industry, providing support solutions for regulatory compliance and methods for increasing production. John is also a trainer for increasing production on clients' factory floors.

John manages and oversees the onsite safety compliance services for various clients. John has a unique skill of creating a teamwork atmosphere with project progression with safety always a focus. He leads many of the high hazard services. His unique approach at identifying the hazards and providing comprehensive solutions with minimal impact to production has allowed manufacturing facilities to maintain safety while production remains high. John was a standards development subcommittee member for ANSI B11.19 (2003) – The Performance Criteria for Safeguarding. He is an expert in electrical safety -NFPA 70E compliance, and Lock Out/Tag Out Procedures.

He has consulted for many Fortune 100 companies and personally managed the process from initial Risk Assessment, Design and Engineering of Solutions, to Implementation of the Machine Guarding and Risk Reduction solutions. His clients continuously reach out for his expertise to train and provide guidance, suggestions, interpretations and development of their own internal standards.

## **PS-HD2: Stoking for Competitiveness Drive & Survival Instincts of the “First-In-Class” President/CEO/Leader**

Arthur Davis, Operational Excellence Consultant, 3.4 ppm Leadership

To date, only 2% of all Lean interventions succeed. 98% fail because of a lack of specificity as regards what Lean is and is not. This workshop will enable Presidents/CEOs/Lean Leaders to confidently anticipate extraordinary rewards, while maximizing and sustaining their investment in their Lean Programs.

After years of trying to change organizations from the “shop floor up”, this workshop recognizes the necessity of changing the organization from the head office/board room down in two ways:

- a. To facilitate attending Presidents/CEOs (i.e. “top of the house”) to begin to become excited about the competitive possibilities and potential business longevity of a Lean, i.e. TPS, transformation.

—OR—

- b. To enable attending ‘movers and shakers’ and “change agents” to use this suite of tools to persuade their Presidents/CEOs to become The Leaders of the Transformations in their organization.

The problem, we all know, is capturing and maintaining the leader’s attention long enough for him or her to recognize that Lean is a must do, an imperative, a matter of survival for them (both the

leader and his or her enterprise, institution, business etc.). Not doing so guarantees the continuation of the above failure rate AND a very significant lost opportunity.

This workshop will –

- Begin by establishing, “What’s in it for me?”
- Introduce the four “well known” paradigm shifts.
- Explore Arthur’s My “Available Leadership, Management and Execution” systems model.
- Highlight the measure of quality and rates of employee improvement ideas per year.
- Explore the cornerstone of Lean, “The Development of a Process Mindset”
- Develop each individual process map.
- Establish what underpins the performance of the most effective Leaders AND how their leadership affects the performance of their organizations.
  - The “Current State” – i.e. the principles that underpin how we do things today (Peter Drucker’s 10 principles & John C. Maxwell’s 10 principles (The first leadership guru listed on the Top 50 Leadership Guru’s List....according to INC.).
  - TPS, i.e. Lean, as the “Future State”..... The 14 TPS principles as defined by Jeffrey Liker.
- Bring together--
  - Paradigms and their effect on our knowledge and the acceptance/reaction to, “What’s in it for me?”
  - Linking the Performance Results data to the journey on the paradigm shift curve and the arrival at the “new” Future State.....paradigm.

## Arthur S. Davis, Jr.

Operational Excellence Consultant, 3.4 ppm Leadership

Arthur studied the Toyota Production System, the underpinning of Lean, in Japan and managed the implementation of the “Lean” transformation in two US manufacturing plants (1,000 + employees) while working with and learning from Mr. Ichiro Miyauchi, Senior Total Quality Councillor.

While Executive Director of Operations at the Maine Department of Labor (MDOL), Arthur founded the MDOL’s *Bend-The-Curve (BTC)* initiative ....its Lean program. With six years of prior Lean Production implementation experience, he was the Department’s most knowledgeable internal Lean practitioner. During the program’s first 12 months, more than 15 Process Improvement Teams were established with \$12M+ in potential savings identified and \$2M of “potential savings” reported to the Appropriations Committee as savings by the MDOL. He went on to develop a BTC partnership with the Maine Department of Health and Human Services, a collaboration which grew into a multi-departmental Lean training, improvement, and internal practitioner development and certification program. BTC received the *Bright Idea* award from The Ash Center for Democratic Governance and Innovation at the John F. Kennedy School of Government, Harvard University.

Prior to state government, Arthur worked for Digital Equipment Corp (16 years), the General Electric Company (5 years), Pfizer Pharmaceuticals (1.5 years), Supreme Slipper Mfg. Co, (10 years); and as an entrepreneur, The Maine Bonsai Gardens (5 years). He served in a variety of positions such

as Business Owner, Production Supervisor, Process Engineer, Production Manager, Plant Controller, Manufacturing Engineer, Manufacturing Engineering Manager, Manufacturing Excellence Manager, Internal and External Consultant, Operations Management Executive, and Senior Project Manager.

Arthur has a BS Degree and MBA studies: University of Bridgeport, was the US Small Business Administration's Minority Small Business Person of the Year, and received Governor John Baldacci's recognition for "...founding and establishing the State of Maine Bend the Curve program."