

# Friday, August 9<sup>th</sup> – 2019 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>				
8:00AM-8:15AM	<b>Welcome: Stephen Dombrowski</b> , Director, EOD, Connecticut Dept. of Labor				
8:15AM-9:00AM	<b>Opening Keynote: Michael Bremer</b> , Principal, The Cumberland Group				
9:00AM-9:15AM	<b>Transition to Learning Sessions</b>				
<i>Room</i>	<i>Cumberland</i>	<i>York</i>	<i>Kennebec-Lincoln</i>	<i>Oxford</i>	<i>Somerset</i>
9:15AM-10:30AM	<b>A1:</b> Lean Startup Thinking – How Today’s Entrepreneurs Use Cont. Innovation <i>Musica</i>	<b>A2:</b> Building Your House of Lean Maine <i>Johnson &amp; Dyer</i>	<b>A3:</b> Hoshin Kanri (Policy Deployment) <i>Converset</i>	<b>A4:</b> 10 Mistakes to Avoid during a Lean Transformation <i>M. Saleh</i>	<b>A5:</b> Balancing to Takt Time in a Non-Manufacturing Setting <i>Frewin</i>
10:30AM-10:45AM	<b>Break - Change Learning Sessions</b>				
10:45AM-Noon	<b>B1:</b> Lean & Workplace DNA: Creating a Healthy Work Environment Where LEAN Ideas Thrive <i>Downey Maxwell</i>	<b>B2:</b> Gearing Up for Success ... the BIG Why New Brunswick <i>Gunter</i>	<b>B3:</b> Closing the Gap: Aligning your Lean transformation & your financial results <i>Ohaus &amp; Luckman</i>	<b>B4:</b> Lean & Safety Integration <i>Perrotti</i>	<b>B5:</b> Kata: Problem Solving & Coaching for Improvement <i>Elliott</i>
Noon-1:00PM	<b>Lunch</b> (provided)				
1:00PM-1:45PM	<b>Afternoon Keynote: Henry Darwin</b> , Acting Deputy Administrator, U.S. EPA				
1:45PM-2:00PM	<b>Break - Transition to Learning Sessions</b>				
2:00PM-3:15PM	<b>C1:</b> Lean Leadership: Are You Prepared to Lead? <i>Burke</i>	<b>C2:</b> Collaboration Tools for Higher Performing Teams – Beyond Mgt. and Control <i>Suomela &amp; Mahoney</i>	<b>C3:</b> Game Day! <i>Dix</i>	<b>C4:</b> Rapid Improvement Process – The IDEXX Approach <i>Kennie &amp; Bradbury</i>	<b>C5:</b> Do No Further Harm: - Tips for Taking Pain out of A3 Reviews <i>Verble</i>
3:15PM-3:30PM	<b>Break - Refreshments</b>				
3:30PM-4:15PM	<b>Closing Keynote: Dustin Kaehr</b> , Director, Lippert Academy for Leadership				
4:15PM-4:30PM	<b>Wrap-Up -- Next Steps</b>				
<b>See you next year on August 13 &amp; 14, 2020 !</b>					

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# Learning Session Descriptions

**9:15 AM – 10:30 AM**

## **A1: Lean Startup Thinking – How Today’s Entrepreneurs use Continuous Innovation**

Steve Musica, President, Lean East

Learn about the methodology that successful entrepreneurs are using to develop a product or service that customers will pay for – faster. Serial entrepreneur and certified Lean Six Sigma Black Belt Steve Musica will share the five principles of a Lean Startup and teach a simple process that entrepreneurs and innovators can use to launch a new product or service. Steve has founded several innovative companies and consulted with government offices, hospitals, and large and small manufacturing, construction, and insurance companies.

“Lean” processes have had the “fat” or “waste” removed from them and are fully focused on customer value. When applying Lean thinking to product/service development processes, a primary goal is learning what customers do and do not care about for features. Innovation is quicker when waterfall methods of project management are stopped in favor of agile methods. By focusing on customer value and feedback earlier in the process, innovators can learn when to push forward and when to pivot.

The session will be based on Eric Ries’s book *The Lean Startup* and the presenter’s experiences applying Lean thinking to the innovation process, encouraging tests of change to learn what customers value.

You will learn:

- Entrepreneurs are everywhere.
- The fallacy of the business plan.
- The Build – Measure – Learn development cycle.
- A proven Customer Development roadmap.
- Innovation Accounting.
- How and when to pivot.
- Agile development of a Minimum Viable Products (MVPs).
- The business model canvas for a new business idea.

The session is for leaders and all employees in manufacturing, government, services, and healthcare who are developing or preparing to develop new or improved products and services for customers. You will learn new ways to think about project management and the goals of the innovation process.

# Steve Musica

President, Lean East



Steve Musica is President of Lean East and consults on improvement efforts that increase quality while reducing costs. He leads business and healthcare process improvement projects for Lean East and is highly regarded for his team leadership.

Steve is a certified Lean Six-Sigma Black Belt, from Dartmouth College, with extensive experience in Toyota Production System (TPS) methods and has previous management and operational experience as President, CEO, COO, and VP of Operations for medical and technology companies.

Steve learned Lean with some of the best organizations in the world and now uses his knowledge and experience to help others transform their teams. He has facilitated performance improvement projects both large and small for healthcare, government, manufacturing, and service-based organizations.

Steve earned a Bachelor of Science degree in Mechanical Engineering from the University of Maine with high distinction and high honors and a Master in Engineering Management (MEM) degree from Dartmouth College.

## **A2: Building Your House of Lean**

Jamie Johnson, HCV Administrative Manager, MaineHousing

Alison Dyer, Asset Manager, MaineHousing

When Lean/Continuous Improvement was introduced at MaineHousing we didn't know where to start or how it would fit within a non-profit/quasi-state agency. In this session you will learn the lessons we learned along the way and why Lean/Continuous Improvement isn't just for producing widgets and manufacturing companies. We are excited to share our journey with others who don't know exactly where to start and provide the encouragement to "Just Do It". With a "Just Do It" mentality any organization can begin to build their House of Lean.

Like many complex organizations, MaineHousing is comprised of 160+ staff among 14 departments with countless federal, state, and bond regulated programs. We didn't produce "widgets" but we knew there was room to approve our policies and procedures. We didn't want to just get buy-in from staff -- we wanted their investment to continuously improve.

Four years ago, Lean/Continuous Improvement was introduced to a handful of staff within our agency. The energy from and successes experienced by the early adopters gave others the desire and encouragement to invest in Lean/Continuous Improvement.

We will share our challenging journey – what has worked and what has not worked. We have had

to find creative ways to instill Lean/Continuous Improvement in our culture without a full-time position working solely on that initiative. In this session you will learn about creating a culture that instills the principles of Lean/Continuous Process Improvement throughout.

This session will help you to:

- Increase employee engagement through connecting daily work to the organization's strategic goals and mission (e.g. Key Performance Indicators).
- Empower staff to assess, evaluate, and streamline to enhance internal and external customer experience.
- Develop a Community of Practice to facilitate intra-and inter-departmental relationship building.
- Determine and involve key players.
- Establish standards.
- Coordinate resources.

## Jamie Johnson

HCV Administrative Manager, MaineHousing



Jamie has been with MaineHousing for twelve-years representing the Asset Management Housing Choice Voucher departments.

As a MaineHousing Lean Co-Coordinator, Jamie works to organize the agency's Lean initiatives and assist departments in achieving their continuous process improvement goals.

She has been instrumental in the formation of Lean at MaineHousing, as one of its first adopters. Her energy and dedication to its principles and how MaineHousing can benefit have been infectious. She recently graduated from MaineHousing's Inaugural Leadership Development Program.

Jamie holds a Green Belt in Lean Six Sigma and received a Bachelor's degree from Thomas College.

## Alison Dyer

Asset Manager, MaineHousing



Alison has been with MaineHousing for thirteen-years representing the Finance, Housing Choice Voucher and currently the Asset Management Departments.

As a MaineHousing Lean Co-Coordinator, Alison works to organize the agency's Lean initiatives and assist departments in achieving their continuous process improvement goals. Alison recently graduated from MaineHousing's Inaugural Leadership Development Program. As part of the Leadership

Development Program, Alison led a group initiative working with MaineHousing's Energy and Housing Services Department to Lean the Weatherization Billing Process with Maine's Community Action Agencies.

Alison earned a Green Belt in Lean Six Sigma and holds a Bachelor's degree from Thomas College.

### **A3: Hoshin Kanri (Policy Deployment):**

*A Key Pillar of your Lean Management System and critical to deploying a True Company-Wide Strategy of Excellence*

Catherine Converset, President, Productivity Innovation & Executive Partner, Productivity Inc.

Transforming an organization into one that is operationally excellent requires a long-term customer-focused, company-wide strategy. Management committees must define and continuously refine the strategic drivers of the organization and deploy them to ensure everyone is aligned and working toward the same goal. Doing so requires the establishment of a framework known as a Lean Management System.

Central to a Lean Management system is Hoshin Kanri. Hoshin Kanri (Policy Deployment) is a method for ensuring that an organization's strategic goals drive progress and action at every level of the organization.

The fundamental purpose of Hoshin Kanri in a Lean enterprise is to focus a company's improvement efforts on well-defined initiatives to align & mobilize strategic business units, plants, departments, operational teams and all supporting personnel in the transformation process.

Hoshin Kanri is not just the deployment of a few financial targets, but it is a leadership-driven strategic process which gives clarity to everyone on where the company is going and what is important on the Long term, creating the structure for regular review and renewal.

You will learn the different levels of deployment, starting from the Executive Committee level down to team level, and why Catchball is key to build a successful plan. This proven business renewal planning and deployment process will allow you to incorporate your strategic priorities into daily work at every level in your organization.

In this session, you will hear some practical recommendations to start and implement this process and learn to --

- Understand the cornerstones of a Lean Management System.
- Understand the need for enterprise-wide waste elimination and review & discuss the key performance indicators, targets to improve, and countermeasures that will ensure you remain on course and that your improvement initiatives meet your strategic objectives.
- The key concepts and principles of Hoshin Kanri (policy deployment).
- The 5 steps of policy deployment and how to use the X-Matrix at each level.
- The 4-level performance review system ensuring success.

# Catherine Converset

President, Productivity Innovation & Executive Partner, Productivity Inc.



After graduating from the Ecole Supérieure de Commerce de Paris (ECSP), Ms. Converset successfully held several positions within the PECHINEY group in Italy and France, becoming worldwide export manager of aluminum rolled products for Pechiney Rhenalu and then director of packaging development for the Pechiney Group. After ten years in the aluminum business, 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 education and support for Executive and Management teams to build Lean Strategy, define an implementation roadmap, and create a Lean Management System.
- Policy Deployment (Hoshin Kanri).
- Lean Management and Lean leadership training and coaching
- Lean in Services: Financial industries (banks, insurances, lease solutions), Corporate support services (HR, Finance, Customer Service...), R&D, Marketing and Sales.
- Lean in pharmaceutical and biotech environments (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 to drive to tangible, measurable and proven results. She is experienced in guiding Executive Committees in defining their operational and strategic objectives and in building management and organizational systems. She has acquired extensive experience implementing Lean in pharmaceutical, R&D and service environments. She is fluent in French, English and Italian, and teaches Lean Management in Service Industry at the Center for Operational Excellence at The Ohio State University.

## **A4: 10 Mistakes to Avoid during a Lean Transformation**

Mohamed Saleh, Principal, Vizibility. LLC

During every Lean Transformation there are many lesson learned both of what worked and what didn't. In this Learning session we will discuss how to avoid the perils of Lean. This will span from initiation of the transformation to maturity and provide relatable perspectives and challenging insights to leaders and practitioners as they advance in their own Lean journey.

This session looks at strategic approaches that have both worked and failed as Lean Management

and Production Systems start to get established as the engine and driver of an operating model in building a Lean Principle-based architecture for organizations and anchoring it into the values and fabric of their cultures.

You will learn of areas to avoid as you embark or advance in the Lean journey. These areas span across initial conversations with the Board and Senior Leadership teams, to how to get started, to strategies to deploy Lean Management both for Hoshin Kanri and Daily Management, to the Production System and selecting appropriate Kaizens, to training and building organizational problem solving muscle, to technology and establishing an internal Lean Office.

You will learn about –

- a. Understanding the critical necessity for knowing the Why or Need.
- b. A guide on how to creating your own operating model.
- c. How to lead with the Behaviors.
- d. How to be Lean and avoid artificial aesthetics.
- e. Approach on how to Go Deep.
- f. Different Strategies in Deployment.
- g. Designing different training venues for the transformation.
- h. Examples to creating a trajectory that keeps evolving over time.
- i. How to hire the right Lean Talent at different points in your journey.
- j. How to advance with tools and techniques to creating the vital few but nimble and agile to market indicators.

## Mohamed Saleh

Principal, Vizibility. LLC



Mohamed Saleh has over 18+ years of experience, with the past 11 Years of Lean experience at Hartford Healthcare, most recently as the Senior Sensei and Executive Director of the Lean Office, first as the Director of Continuous Improvement for the Medical Group then Hartford Hospital, as well as before that with Franklin Products, a division of Boeing Aerospace.

He is a Professor at Central Connecticut State University for the Graduate Department of Engineering and Technology Management with a focus on Lean Management, Operational Management and Project Management. He is currently the Principal at Vizibility, llc.

He holds a Master in Engineering and Technology Management and Bachelor in Mechanical Engineering from Central Connecticut State University and is currently working toward a PhD in Business Administration from Northcentral University. He has several certifications, including a Six Sigma Master Black Belt (Kaplan University) and is a past Malcolm Baldrige Examiner (PIPEX).



## A5: Balancing to Takt Time in a Non-Manufacturing Setting

Anne Frewin, Senior Lean Operations Manager, IDEXX Laboratories

The Toyota Production System is built on four guiding principles:

1. standard work exists,
2. methods for sending and receiving messages are unambiguous,
3. pathways are simple, and direct, and
4. improvement work follows the scientific method of PDSA.

Takt time is the cadence by which the outputs come off the manufacturing line and is based on demand forecast and available work time. Each step must keep the line moving at a steady pace in order to meet their forecasted demand, built into their workflows to achieve a defined takt time.

But, is it possible to apply the concept to a non-manufacturing line where inputs are not constant, workflows cannot be broken into parts with cycle times less than takt time, and all work has to be done by the end of the shift?

IDEXX reference labs has implemented the concept of balancing workflows to takt time in their Parasitology departments across North America. They have been able to reduce variation in cycle times by over 50%, labs are processing to the same standard workflow, and employees are engaged in the process working together to achieve their nightly goals.

This session will walk you through the process followed in the reference labs from data collection to implementation and coaching on managing in a takt time environment.

Many lessons were learned. You will learn about these as we walk through the successes and failures along the way in how takt time was calculated and used to balance the line.

## 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.

Reference lab leadership has fully embraced the lean journey and three of the six major strategies for 2019 are centered around Lean. Labs are clamoring for us to come to them and help them start their lean journey.

Anne joined IDEXX in March 2017 as the Lean Leader supporting Manufacturing Operations and Corporate before moving into her current role in January 2018.

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

## 10:45 AM – Noon

### **B1: Lean & Workplace DNA: Creating a Healthy Work Environment Where LEAN Ideas Thrive**

Janie Downey Maxwell, Founder, Organizational Habits

LEAN ideas are like the DNA in our cells. They're a map of what can potentially happen. But what drives action at a cellular level is the environment a cell lives in – not its DNA. With LEAN, it's one thing to bring in smart new ideas (DNA) but it's quite another to get your employees motivated and engaged enough to take action. Success awaits you in the environment you create!

Think about past successes and failures at work. Was your staff bored or full of enthusiasm and passion? When you have a healthy work environment, you can feel the energy in the room. In this session, you'll learn tips and tools to help create an awesome work environment where LEAN initiatives thrive.

In this session, you will learn about ways to motivate employees as a way to unleash their greatest potential:

- Ways to build a passionate, healthy work environment.
- Leading by example with enthusiasm and passion. Passion is contagious!
- Learning Aristotle's key principals for motivating others: Lethos – credibility; Logos – evidence and data; Pathos – emotional appeal.
- Recognizing passion in the workplace – Your employees' passion may not be about their specific work but most people have a passion for success, for growth, for new learning, and for being part of a successful team.
- "Seeing" your employees as individuals and listening to them with an open heart and honest curiosity.
- Bringing dignity to the workplace.
- Ways to be authentic as a manager.

You will walk away feeling inspired to bring more passion to your workplace. You'll leave energized. And you'll have a mixed bag of tools you'll want to try out on Monday morning when you return to 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 catalogs, 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 runs two web businesses in addition to her day job. And she writes, speaks, and presents regularly about

Organizational Zen. She is very involved with local theater - directing, acting, singing, and making props. Also, she volunteers with the Animal Refuge League of Greater Portland and the Maine Historical Society. She runs, meditates, loves to travel, and promises she still gets 8-9 hours of sleep every night!

She was born and raised in the Washington DC area, and has a degree in history from the University of Virginia.

## **B2: Gearing Up for Success ... the BIG why**

Caryn Gunter, Process Improvement Facilitator, New Brunswick Department of Transportation and Infrastructure

When change management is done well, people feel engaged in the change process and work collectively towards a common objective, realizing benefits, and delivering results. Unfortunately, very little time is devoted to the upfront change management required to ensure people understand the background rationale for the change as well as how it may impact stakeholders or themselves personally.

Identifying "the BIG Why" lays the framework for all future work by systemically asking: why is the change necessary, what are the problems and desired outcomes, what will the benefits be or impacts if we do nothing, why is it required now, etc. Completion of the "the Big Why" exercise alone will better prepare team leads and enhance buy-in / support.

The session will highlight (from New Brunswick's DTI perspective) why this framework was developed, why all projects should begin with this (or similar) exercise, the therapeutic benefits, and the negative impacts of not completing "the Big Why" exercise.

Project Management focuses on "the plan" (i.e. events & activities, scope, content, cost, and resources) whereas change management focuses on "the people" (i.e. stakeholders, involvement / engagement, communication, skills and ability, seeing / feeling). This session will highlight how

Kotter and ADKAR change management methodologies align with project management steps when using Lean Six Sigma DAMIC. You will be able to draw similar conclusions for almost any other change management methodology.

The session will:

- discuss how we noticed, acknowledged and addressed the lack integration of change management, project management and innovation with Lean Six Sigma,
- showcase how we took the traditional Lean Six Sigma tools and creatively adapted them to meet our customers desired outcomes, and
- discuss and focus on the integration of the differing concerns of change management, project management, and innovation with Lean practices.

You will walk away with a set of tools that can be easily adapted for any improvement effort (based on size, scale, work areas / conditions, scope, etc.). You will be able to complete various exercises / tools / workshops and well as highlight opportunities for integrating change management and project management into Lean Six Sigma.

## Caryn Gunter

Process Improvement Facilitator, New Brunswick Department of Transportation and Infrastructure



In her current role as a Process Improvement Facilitator with the Performance Excellence Branch at NBDTI, Caryn leads teams through various continuous improvement projects with the goal of identifying, enhancing and sustaining improved business performance and services.

Caryn Gunter is a member of the Performance Excellence Team at the New Brunswick Department of Transportation and Infrastructure. In a group of Lean Six Sigma practitioners, she has a diverse background of previous work experiences and formal education including business administration, sciences and engineering disciplines. This has enabled a collaborative environment, where as a group, they have facilitated department wide initiatives and tackled complex business problems.

Over the course of 2 years, she and her team facilitated projects that achieved over \$11 million in savings and executed a significant reorganization of the Department. Currently, they are focusing on improving operational efficiencies for field staff and head office operations through the installation of the formal management system. They are also concentrating on equipping staff to self-achieve improvement opportunities by providing training and coaching to Waste Walkers and Green Belts.

Caryn graduated from the University of New Brunswick (UNB) with a Bachelor of Science in Civil Engineering (BScE) and Master of Science in Transportation Engineering (MScE). She received her designation as a Professional Engineer (P.Eng.) and practiced for a number of years under the New Brunswick Department of Transportation and Infrastructure (NBDTI) before becoming a certified Lean Six Sigma Black Belt in 2015.

## **B3: Closing the Gap: Aligning your Lean transformation & your financial results**

Karl Ohaus, Partner, Lean Transformations Group

Jim Luckman, Partner, Lean Transformations Group

The capability of an organization to survive is tied to its ability to understand and predict its financial health. As Toyota developed Lean in Japan's post-World War II economy, the ability to monetize the Lean effort was key to its survival.

There are a few important steps that leadership can do as a part of their strategic planning and policy deployment to insure that the organization's efforts to deploy Lean are having the desired impact.

This session will help you to work on linking the activities of your Lean deployment to the outcomes on your organization's financials. The methodology presented will take a high-level view of the primary and support value streams in the organization and link their performance to purpose. Understanding the substance of this session is important for organizational leadership.

Many organizations struggle to justify the investment in creating a lean continuous improvement culture. This session will help you to learn to target activities that have a positive impact on the financials, thereby justifying the effort.

The session will cover the basics of policy deployment, and you will begin to become better able to:

- identify a "Primary" value stream.
- understand the performance of a value stream as to purpose and identification of the major problems or gaps in performance of a "Primary" value stream.
- identify and describe support value streams and understand how they support and impact the performance of primary value stream.
- design an experiment on closing the gaps in performance and the overall expected impact by using A-3 thinking and documentation.
- use the creation of this information to insure the Lean Transformation effort has the desired results.

## Karl Ohaus

Partner, Lean Transformations Group



Karl Ohaus is a Partner at Lean Transformations Group and a faculty member for the Lean Enterprise Institute (LEI).

Since setting sail on the consulting waters, he has had the privilege of working with the top thinkers and leaders in health care, financial services, manufacturing, and product development. His unique gift for being able to quickly understand processes and to see how pieces fit together gives him many opportunities to do what he loves. Karl provides guidance in the transformation to Lean principles at the shop floor and at management levels with a strong understanding of how to create the cultural changes required.

Karl received a BS in Mechanical Engineering from Duke University, School of Engineering. After Graduation he was at American Standard where he was a Design & Development Engineer, responsible for overseeing new products from the marketing “wish list” to concept development to product design and full production. He was awarded 10 patents during this time. In 1991 Karl left American Standard and became CEO of a manufacturing company producing parts used in safety sensitive automotive components. It was during this time that Karl developed his understand and passion for Lean and left in 2002 to begin teaching others Lean.

## Jim Luckman

Partner, Lean Transformations Group



Jim Luckman loves solving big problems. An engineer by training, he has expanded his interests in solving problems from technical to social including large complex business problems. He now works with diverse companies by coaching leaders on how to transform their organizations into a culture of energized problem solvers.

Jim has developed his skills through over 30 years of experience in business and 17 years coaching all levels in organizations on how to solve their complex business problems.

During his business experience, as a leader, he has had the unique experience of leading three separate lean transformations, as a Plant Manager, as a Director of a Research and Development Center, and as a CEO of a small start-up company. In his coaching role, he has engaged with hundreds of companies and organizational functions in nearly every industry. The result of each engagement has been significantly improved organizational performance with the employees feeling a greater sense of responsibility and increased enthusiasm.

Since 2004, Jim has been a founding partner of The Lean Transformations Group, focused on building problem-solving capabilities in companies. LTG has been dedicated to evolving and growing the

effectiveness of an intervention methodology that can be used by all industries to more fully engage their organization and develop the people doing the work. These organizations achieve significantly improved business results by adopting this intervention methodology.

Jim is a faculty member of the Lean Enterprise Institute (LEI). He has published articles on lean leadership and is a co-author of two books, *Mapping to See* and *Perfecting Patient Journeys* (a recipient of a Shingo Research and Professional Publication Award). He has been a speaker at the LEI transformation summit and The Philosophy of Management Seminar. Jim has a B.S. in Electrical Engineering from Tri State University and an M.S. in Computer Engineering from Case Western Reserve University.

## **B4: Lean & Safety Integration**

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

Our lean journey takes us down many roads to remove waste and make our processes work more efficiently. There are times that this process uncovers new hazards or hidden risks that are not always obviously apparent.

Safety concerns are universal in every organization but frequently are given inadequate attention.

Often, when companies integrate lean methodologies, they look to remove waste. Sometimes during this process they produce new hazards and risks. The concept of removing waste during a process or looking for ideas to reduce set up times often inadvertently expose hazards and dangerous conditions.

This session will use examples where, while employing lean, new hazards and safety issues were exposed and alternate methods that could have increased safety and reduced waste.

During this session, you will learn about –

- lean approaches that unknowingly created greater safety risks or hidden risks that were not initially identified.
- solutions to the examples where a lean approach was still maintained.
- how a strong cross-functional team, when implementing your lean strategies, will have a positive effect on your safety metrics.
- how you can employ lean tools and use them to become more efficient while increasing safety.
- how lean and safety can be integrated in the following areas:
  - Risk assessments
  - Ergonomics
  - Maintenance

You will come away from this session with some tools and techniques that will help you to perform improved and more consistent continuous improvement activities while maintaining safety.

## **John Perrotti, III, CMRP,**

Vice President, Fuss & O'Neill Manufacturing Solutions



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.



## B5: Kata: Problem Solving & Coaching for Improvement

Bob Elliott, Continuous Improvement Manager, Greater Boston Manufacturing Partnership

Kata when applied correctly will help develop all levels in the organization to apply a scientific approach to problem-solving. By linking upper Managements Strategic objectives to Managers departmental programs and finally linking them to Department Leaders daily problem-solving, businesses will achieve alignment through the Toyota Improvement Kata. This is truly a way to achieve a Culture of “Everybody Everyday.”

This introductory Kata session is meant for anyone, experienced or not, looking to learn more about the IK/CK cycles. It will give all of you the opportunity to practice the four steps of the Improvement Kata as well as the Coaching Kata cycles. Do you Kata or would you like to?

In this session, Bob Elliott, one of GBMP’s CI Managers and official Kata Geek, will share what he has learned from Mike Rother, author of the 2009 book *Toyota Kata*.

You will learn about the Improvement Kata and the Coaching Kata cycles (IK/CK) and, how if applied correctly, they will help your organization develop a lasting process for problem-solving and coaching. This will be accomplished through a fun and interactive Kata 4 steps improvement exercise that everyone can participate in and will learn how to bring the exercise back to your facility and share it with others.

You will first be introduced to the definition of Kata “Routines that are Practiced,” and given real world examples outside of the business world.

You will be introduced to the Improvement Kata/Coaching Kata (IK/CK) as Scientific Methods, showing how Scientific thinking and Kata are equal to problem solving. Next, you will learn what scientific thinking is and how Kata is a scientific method. From there, a description of the 4 steps to the Improvement Kata – Getting the Direction or Challenge, Grasping the Current Condition, Establishing your Next Target Condition and Conducting Experiments towards the Target Condition. Key points will be given for each.

You will --

1. Learn what Kata are.
2. Learn the 4 steps of the Improvement Kata.
3. Apply the 4 steps of the Improvement Kata during a hands-on exercise.
4. Learn about the Learners Storyboard and the Coach’s 5 Question Card and how to go through Coaching cycles.
5. See how Kata can be used to develop a scientific mind set at each level of an organization.
6. How to apply the 4 Steps of the Toyota Improvement Kata.

## Bob Elliott

Continuous Improvement Manager, Greater Boston Manufacturing Partnership (GBMP)



Bob Elliott is a Continuous Improvement Manager at GBMP and a Certified Shingo Institute Workshop Facilitator.

Bob has facilitated training and implementation of Lean Principles in many World-Class organizations including Raytheon, Drager Medical, Flexcon Industries, Mersen, Norfolk Southern Railroad to name a few. The training and implementation in these organizations has resulted in reduced lead-times, quality and productivity improvements and cost reductions. Check out some of his case studies showing examples of these types of improvements at Dacon

Construction, Accurounds and Innovent Technologies on the GBMP About Us page.

Bob's training and coaching abilities are not limited to manufacturing. He has worked with many Healthcare organizations including Concord Hospital, Lowell General Hospital, Mass General, Emerson Hospital and Somerville Hospital. He has also worked with service industries such as Mass Mutual Insurance Company, Boston's MBTA and Dacon, a design & construction architectural company.

Bob, working with Mike Rother, has developed GBMP's Kata program which has been delivered at local businesses as well as local conferences. He has presented at GBMP's annual Northeast Lean Conference and has been involved with the Shingo Prize as an examiner for Shingo applicants such as Raytheon and Snap-On Tools. Bob has been a frequent speaker/presenter at SME's Eastec, a New England manufacturing exposition held in Springfield MA and was also a guest speaker for the Worcester chapter of SME.

Bob, a former GBMP client and Board of Directors member, has been involved with GBMP since the early 1990's. He has held top-level Operations Management positions at several local Massachusetts companies. Bob holds a BS in Operations Management from Northeastern University in Boston.

## **2:00 PM – 3:15 PM**

### **C1: Lean Leadership: Are You Prepared to Lead?**

Robert Burke, Executive Director, Value Innovation Partners

This session identifies and explores the concepts of Lean Leadership while providing a framework for assessing your Lean Leadership skills. Lean Leadership is an essential tool for those whose firms are embarking on a Lean journey or who are already on their way. If we change the way we do business, then we must change the way we lead that business.

Through learning concepts such as What is Lean Leadership, Stakeholder Matrix, Molecule Map, Communication Plan Self-Assessment tool, 20 keys of Leadership, you will acquire the basic tools

to be successful Lean Leaders while using a method to assess yourself as a Lean Leader through the use of a self-assessment tool.

You will learn about–

- Self-Assessment tool.
- 20 keys of Leadership Learning Objectives.
- What is Lean Leadership.
- The Difference between Managing and Leading.
- How to be successful Lean Leaders.

## Robert Burke

Executive Director, Value Innovation Partners,Ltd.



Robert Burke is an Executive Director 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.

Bob 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: Pharmaceuticals, 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 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. Bob served as the 2018 AME International Conference Chair, is a past President of NE AME, and is currently a member of NE AME's Board of Directors. He has presented Lean Sigma workshops and sessions at both national and international conferences - a sought after speaker who has presented sessions globally to organizations such as IIE, ASQ, APICS, CILC Lean Systems Summit, NAM, Kavaq, MESC, and many others. He holds a B.S. in Business Administration.

## **C2: Collaboration Tools for Higher Performing Teams – Beyond “Management and Control” Toward “Collaboration and Communication”**

Raija Suomela, Project Consultant, Operations Lean East  
Priscilla Hansen Mahoney ,Owner, Blazing Trails Coaching

This learning session discusses where Collaboration and Task Management tools, and the culture that surrounds them, counter a one-sided top-down approach to project management. New Project Execution culture enables team members to champion ideas and take ownership of their work, and provides a new level of execution excellence for teams who want to reduce the madness and have a clear vision of their work – planned work, tasks, requirements, work in progress, priority, due date, and assignments.

Work is typically organized, commented on, prioritized, and socialized among a professional team of experts who want what’s best for the project outcome – whether they are working on a solution for their own business process / value stream or whether they are a special project team providing service to a customer business team. This session shows how fundamental concepts of Lean: waste reduction, and value stream, empowering individual contributors, and responding to change are enabled with the new approach -- project management using modern tool sets in both small, low complex projects with few participants and medium and larger sized projects with additional participants and required tasks and dependencies.

Raija and Priscilla will share their experience of using collaboration tools (Trello), communication tools (email and messaging) and file sharing (dropbox, Google Drive, etc).

You may have begun using these tools, but yet there are few professional society workshops on the topic of looking at the changing nature of project work from a task management / toolset perspective. This session will help reinforce and practice new habits and also introduce new awareness to how these tools support what teams hope to achieve.

### **Raija Suomela**

Project Consultant, Operations Lean East



Raija Suomela is a Project Consultant with Lean East who believes that process change that engages all levels of an organization empowers employees and develops future leaders.

She has 10 years of experience in a variety of roles as a Business Analyst and Scientist supporting research and development operations. Raija has championed lab operations improvements and IT systems changes in key roles for multiple project teams, and received Awards of Excellence from Merck & Co. She has a deep understanding of documenting work processes and project requirements and is committed to supporting improvement processes and leading project teams through change.

Raija earned a BS degree in Biochemistry with honors from Hartwick College. She was awarded a National Science Foundation Research Experience for Undergraduates (NSF-REU) position and the Freedman Prize for Student-Faculty Collaborative Research. Raija received Six Sigma training and has employed Lean tools and techniques to improve outcomes.

## Priscilla Hansen Mahoney

Owner, Blazing Trails Coaching



Priscilla Hansen Mahoney is a business coach with a passion for helping business owners develop strategies, systems and leadership teams, so they can take their business to the next level! Her unique holistic approach to coaching alleviates the inherent problems successful businesses generate. She collaborates to define goals, map out growth strategies, and activate a dynamic course of action that will lighten the every-day work load, eliminate time-management problems and sharpen leadership skills.

She has over 20 years of team leadership expertise and high-performance team building experience.

She is an ICF-accredited business coach, trained by iPEC coaching with over one thousand hours of hands-on coaching skills. She has helped hundreds of business owners create their business models, develop strategic plans, execute action plans, and build the business of their dreams that fully supports their lifestyles.

### **C3: Game Day!**

Jason Dix, Continuous Improvement Manager, Geiger Group

Lean is full of fun games that provide an excellent opportunity to get experiential learning. Join me in participating in three 2 minute games where you can get an “aha” moment and two 25 minute games that will inspire and engage your employees to use Lean tools and techniques, making their jobs better every day. These will provide experiential learning for both manufacturing and office environments which you can replicate in your own workplace.

The short exercises will solidify why Lean is effective. These exercises can be done in any environment with any number of people. They are short exercises that prove seeing is believing, a bad process will beat a good person, and the importance of identifying waste.

The Office exercise will show that the office is full of hidden variation, where multitasking is often seen as strength although multitasking can sabotage your ability to operate sustainably and result in inevitable variation.

The Manufacturing exercise will show what happens when your standards are improved but everyone around you is unaware, thus making the new process less effective than the old way

even though it has been through a kaizen even. It will demonstrate when standard work goes awry in manufacturing and why communicating standards visually is successful.

## 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 a Lean Six Sigma Yellow belt.

### **C4: Rapid Improvement Process – The IDEXX Approach**

Kevin Kennie, Distribution Center Manager, IDEXX

Jocelyn Bradbury, Operations Manager, IDEXX

Come see how IDEXX puts their own spin on Kaizen events. An RIP, or Rapid Improvement Process, is typically a 1-3 day event where a team tackles a process issue. We will take you through the entire process, using an example of a successful RIP event to help tell the story.

Watch us approach all aspects of process improvement – Scope, Current State mapping, Ideal and Future State formations, implementation, and finally celebration. Developed in-house by our own employees we are excited to share with and learn from fellow Lean enthusiasts as we continue to advance our Lean Culture.

Rapid Improvement projects are a method/tool similar to A3 development that helps team drive change rapidly to results while integrating lean into their daily work.

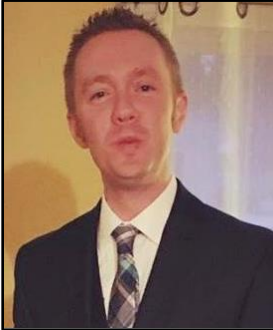
We will walk you through the Rapid Improvement Process starting with pre-work, the event itself, and the follow up structure to ensure sustainability based on the PDSA concept. This includes observations, scope, process mapping current, future, and ideal states, implementation and communication plans, utilization of Gemba boards for the Study/Act portion of PDSA, and finally the celebration with the team.

You will learn –

- Key success factors when involving employees in solving problems.
- Small changes go a long way.

## Kevin Kennie

Distribution Center Manager, IDEXX



Kevin has been in Distribution and Logistics for 20 years. His experience ranges from a family-owned retail chain that grew into one of the top 12 sporting goods retailers in the country, to a global health care corporation at IDEXX.

His Lean journey started just over 3 years ago at IDEXX. With support from the company Lean Leaders and using Lean methodologies, he was able to become a Lean Champion through IDEXX's in-house certification program.

He believes strongly in Lean, Gemba and servant leadership; striving to make IDEXX's distribution center an employee-led, continuous improvement environment.

## Jocelyn Bradbury

Operations Manager, IDEXX



Jocelyn has been with IDEXX for 16 years in various roles including intern, scientist, and operations manager. Her Lean journey began 3 years ago at IDEXX, and what started as a spark developed into a career focus.

In this role, she leads and facilitates continuous improvement efforts in the Technical Manufacturing and R&D teams, leveraging her experience at IDEXX to bring together cross-functional teams.

As an Operations Manager with a Lean Leadership focus, Jocelyn coaches and mentors scientists in the Technical Manufacturing organization in Lean tools and concepts through projects and rapid improvement events.

### **C5: Do No Further Harm: - Tips for Taking Pain out of A3 Reviews**

David Verble, Partner, Lean Transformations Group & Faculty, Lean Enterprise Institute

Leaders developing the capabilities of their team members and staff is one of the key success factors in building a lean/continuous improvement work environment.

As demonstrated in John Shook's, *Managing to Learn*, the A3 report is one of the tools frequently used to both develop both operational performance and employee capability. Many well-meaning managers and leaders, however, approach A3 reviews with a focus more on improving the A3 than developing the thinking of its creator.

This session will introduce an approach to responding to A3s that is focused more on Asking than

Telling, Prompting Thinking rather than Correcting it, and that is intended to leave the A3 owner still feeling responsible for improving effectiveness of the PDCA problem-solving story it tells.

If you have to do A3s you've been there – in the hot seat. Notice I said “have to.” I know few people who jump at the chance to do an A3, and a large part of it is the experience of an A3 review. You have the responsibility for addressing a problem or leading an improvement. You've worked hard with your ears, eyes, and legs to create a story of how you believe it can be done. You know there's no perfect A3 but when you put yours forward for review it gets torn apart. You usually get a lot of corrections, suggestions, other solutions, advice, other things to think about, and feedback that implies you have low thinking and communicating ability. And when you leave the review you still have the responsibility but little idea what to do with your A3 to get your thinking across.

You can't change what other people do but when you are the reviewer there are a few simple (not always easy) things you can do to make your review comments both helpful and respectful. Your job is not to tell her or him how to FIX their A3.

This session will introduce the following techniques you can use to make your comments in A3 reviews less painful and more helpful:

- 2 questions you can ask yourself when you are about to jump in and offer your own ideas that will hopefully help you hit PAUSE.
- A way to distinguish between helpful and not-so-helpful comments in a review and then make a mid-course correction if needed.
- A simple twist for turning a disrespectful question (closed, leading corrective, suggestive) into a more helpful one.
- A way listening with curiosity can lead you to ask questions that prompt the A3 creator's awareness and thinking about the PDCA Problem Solving story in her/his A3.

While not expected, to get the most benefit from this session and contribute to everybody's learning, if you can, bring an A3 you are working on with you.

## David Verble

Partner, Lean Transformations Group  
Faculty, Lean Enterprise Institute (LEI)



David Verble, M.S., has been a performance improvement consultant and leadership coach since 2000. Prior to that, he worked for North American Toyota for fourteen years, first as an internal change agent and later as a Manager of Human Resource Development at the plant and North American levels. He has been on the workshop faculty of the Lean Enterprise Institute in Boston for fifteen years.

David has worked with clients in manufacturing, healthcare service, finance, higher education and government in North America, Europe, Asia and



Australia. His work experience has focused on process performance improvement, coaching, leadership development, and facilitation of strategic thinking and problem solving. He has a graduate degree in instructional systems and performance technology and training in consulting psychology.

David is a founding member of the Lean Transformations Group (LTG) which provides lean implementation support to a number of manufacturing and non-manufacturing clients. LTG uses value stream mapping to identify and help implement process improvements and transfers the technology to its clients to improve and sustain their business processes. The LTG partners are authors of the *Mapping to See* kit for facilitators of value stream improvement projects and *Perfecting Patient Journeys* for process performance improvement leaders in healthcare.