

# OPEX SUMMER

BUSINESS TRANSFORMATION

# LEADERS SUMMIT 2018



August 27 - 29 2018 | Hilton Resort and Spa, San Diego, CA

## ACCELERATE OPERATIONAL EXCELLENCE THROUGH TECHNOLOGY, PEOPLE AND PROCESS

FOR TRANSFORMATION LEADERS, BY TRANSFORMATION LEADERS

**19+**

YEARS HERITAGE

**145,000+**

COMMUNITY MEMBERS

**250+**

TRANSFORMATION LEADERS

**70+**

THOUGHT LEADER SPEAKERS

*LEARN FROM THE BEST TO BUILD AND EXECUTE A  
WORLD CLASS OPERATIONAL EXCELLENCE AND BUSINESS  
TRANSFORMATION STRATEGY*

The biggest ever summer speaker panel including:



ERICSSON



AON



dun & bradstreet

BBVA Compass



KAISER PERMANENTE

HBO

Johnson  
Controls



Coca-Cola



Radial

Hertz

DUKE  
ENERGY

POWERED BY

**PEX**  
PROCESS EXCELLENCE  
NETWORK

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# WELCOME

Dear Colleague,

An increasingly competitive global market full of disruptive challenger brands together with evolving digital marketplace and workplace continue to push companies to reinvent and transform to achieve business excellence, only this time, with a much more aggressive goal.

**Anything less than 10x improvements is no longer enough to inspire your CEO and CFO – they demand more from you, their COOs, Transformation and OPEX Leaders.** They need you to lead the charge to true business excellence, and use technology, people and process methodology to deliver cutting-edge operational and business excellence.

Join leading Operational Excellence companies and transformational leaders across North America, all exclusively under one roof. With the ability to benchmark and learn from operational leaders across industries, leading brands, market disrupters and industry gurus, OPEX Summer: Business Transformation Leaders' Summit will leave you inspired to take your technology, people and process strategy to the next level.

I look forward to meeting you in August in San Diego.



**Cathy Gu**  
Event Director  
**OPEX Summer:  
Business  
Transformation  
Leaders Summit**

## WHO ATTENDS OPEX SUMMER?

It is the leaders of Operational Excellence and Business Transformation who will gather in San Diego. They are the ones who are tasked with leading, strategizing, building and delivering operational excellence and change across the business. They are people who make the decisions in what business transformation and the future of their business will look like.

**Vice President Operational Excellence**  
**Head of Operational Excellence**

**Vice President**  
**Business Transformation**  
**Head of Business Transformation**

**Vice President Business Excellence**  
**Head of Business Excellence**

**Vice President Process Excellence**  
**Head of Process Excellence**

**Head of Enterprise/Business Architecture**  
**Business Architects**

**Vice President Transformation**  
**Head of Transformation**

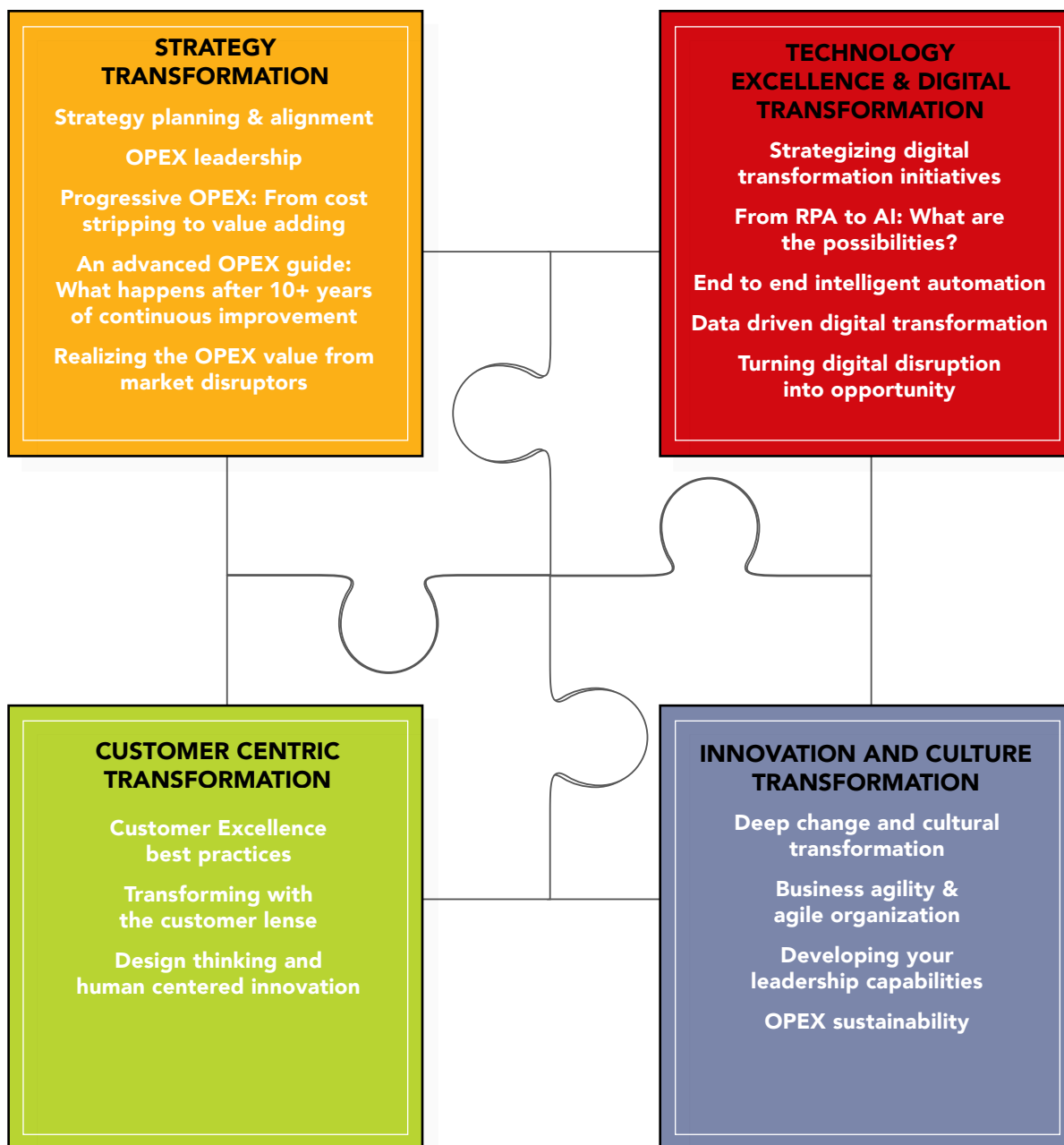
**OPEX Summer** welcomes the most inspirational, progressive and game-changing Transformation Leaders on the stage. With over 70+ inspirational speakers, all of whom are OPEX leaders, you will be hearing from and networking with business leaders just like you.

# CORE THEMES FOR OPEX SUMMER

## OPEX Summer: you don't want to miss it!

OPEX Summer is the place where business transformation leaders come together to discover what it takes to drive meaningful and sustainable transformation, from the key aspects of Process, Technology and People.

Below are the 4 main themes we will be addressing throughout OPEX Summer from a variety of different mediums; Interactive Discussion Groups, Case Studies, Workshops...



# WHAT ARE TRANSFORMATION AND OPERATIONAL EXCELLENCE LEADERS TACKLING AT THE SUMMIT?

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01

Progressive & sustainable OPEX: from cost stripping to value adding

02

Aligning OPEX leadership with business strategies for maximised business impact

03

Achieve Customer Excellence through customer operations redesign and co-creation

04

Deploy design thinking and inspire human centered innovation

05

Manage deep change and cultural transformation

06

Establish an agile business model and culture for quicker market and customer response

07

Develop a human based leadership for long term growth and performance

08

Implement end to end Intelligent Automation

09

Drive digital transformation through cutting-edge advancements in Next Gen BPM, Analytics, Robotics and AI

10

Business transformation for 10x business performance

# HOW IS OPEX SUMMER DIFFERENT?

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**Innovative:** Putting digital at the heart of operational excellence and transformation



**Inspirational:** The big ideas from speakers who will show you how to think differently



**Fun:** Party with PEX in the summer sun with drinks receptions and networking!



**Progressive:** Focusing on strategic value based OPEX breakthroughs to achieve 10x improvements



**Interactive:** Learning by participating with brand new formats (TED talks, IDGs, Scribes)



**Community:** Generating insights from growing 140,000 community members

# SPEAKER HIGHLIGHTS



**Codin Caragea**, Senior Vice President, Business Process Management CoE, **Riyad Bank**

Codin brings unique perspectives drawn from his hands-on experiences in both Enterprise BPM and customer experience. Working directly with the Chief Executive Officer Codin currently is Senior Vice President, Head of BPM Centre of Excellence for one of the top banks in the Gulf Region, Riyadh. Their mature process improvement and customer transformation model will provide tremendous benchmarking and practical learning value for companies that are along the same journey.

Join Codin on Monday morning, August 27th at 8:30am for his workshop session: A3 An integrated view on redefining customer experience: Aligning business strategy and processes around the customer's needs



**Karen Tilstra**, Co-Founder, Florida Hospital Innovation Lab; Executive Fellow of Innovation, **Santa Clara University**

Karen wants to live in a world where work is fast, people are free, and chocolate is devoid of calories; but in the meantime she is the co-founder the award-winning FHILL, Florida Hospital Innovation Lab. Her passion for design thinking is paramount and anybody who joins her design thinking workshop on Monday afternoon would absolutely be inspired by her enthusiasm and take away more than a few practical tips in implementing design thinking.

Join Karen on Monday afternoon, August 27th at 3:30pm to get a piece of Karen: D4 Design Thinking (DT) for new ways of problem solving and business Success



**Robin Gomez**, Director Data and Analytics, **Radial**

Process excellence leaders have made tremendous progress in data and analytics area in the past couple of years. Robin wears 2 hats at Radial – owner of OPEX in customer care whilst leading the data and analytics team to connect the dots across the entire operations organization.

Don't miss Robin's presentation on Tuesday afternoon, August 28th at 4:50pm titling: Driving client centricity across the organization and how is data connecting all the dots: A Radial case study



**Daniel Abrantes**, Global Change and Communications Manager, **IKEA**

Daniel is currently leading the change and communication work in IKEA's digital transformation. Many organizations discuss change; few discuss deep change. And that is exactly what Daniel and his transformational team at IKEA is working on to completely reform how the giant retail store is interacting with their customers and managing their supply chain.

Don't miss Daniel's presentation on Tuesday afternoon, August 28th at 4:15pm titling: Forget about the tools: Start your transformation with customers at heart



**Jamion Berry**, Director of Continuous Improvement, **McDonald's Corporation**

McDonald's started their CI program from their shared service centre and has been making great progress in the past couple of years. Jamion is hosting a Roundtable session on Tuesday afternoon where you can join him for an intimate and insightful discussion on the topic: Driving a company wide CI capabilities: approaches and strategies



**Brian Williams**, SVP, Continuous Improvement & Shared Services, **Voya Financial**

One of the key success factors in Voya Financial's OPEX initiatives is that they have managed to bring the C-level executives into key OPEX roadmap to have consistent leadership support for sustainability and continuous improvement.

Find out exactly how they did that from Brian's session on Tuesday afternoon at 16:50: Best practices in developing leadership behaviors across the entire enterprise



**Rémi Raphael**, Director Business Transformation, **Duke Energy Corporation**

Utility may not be your traditional pioneers in business transformation. Yet the progress they have made in digital implementation and Artificial Intelligence is mind-blowing.

Join Rémi on Wednesday morning, August 29th 9:40 am to find out more during his session: A smart utility transformation case study: Identifying digital opportunities and transforming key functions and operations for agility, efficiency and security



**Nathan Hillman**, Head of Performance and Transformation, **Ericsson North America**

Nathan is responsible to develop and implement Ericsson's transformation framework with a unique combination of leveraging cutting-edge methodologies and digital technologies to create a culture for customer obsession.

You will hear all about it during Nathan's keynote address on Tuesday morning, August 28th 8:10am with the topic: A global progression of business and digital transformation to be customer obsessed

# PEX PARTY WITH TRANSFORMATION LEADERS

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Besides curating great content, PEX is also good at throwing parties to help you unwind and make some new friends in a much more relaxed setting! Our fun-loving community members and summit attendees always find the PEX parties a must attend event. Grab yourself a glass of bubbly, immerse yourself in the beautiful summer evening in San Diego and time to have some fun!





# TRANSFORMATION COMES IN DIFFERENT FORMATS. SO SHOULD YOUR LEARNING EXPERIENCES!

## Interactive Discussion Groups

An invaluable opportunity for you to drill down into the details of a subject which is particularly pertinent to you and your organization. You have the chance to brainstorm your challenges and pick the brains of expert roundtable leaders as well as 12 other practitioners seated at your table. Numbers are kept to a minimum to allow for maximum interaction and provide an informal yet highly constructive approach to problem solving.



## Fire-side Chat

Join an interactive conversation between interviewer and guest speaker in an engaging and intimate setting. These informal chats are a great alternative to keynotes and allow audiences to get involved and engage directly with the speaker by asking questions throughout the discussion.



## Panel Discussion

Brainstorming panels invite delegates to get involved from the very beginning. With 2-4 experts, they will set the scene and open a discussion topic, but the answers, conclusions and roadmap to action ultimately come from you. Benefit from more than the expertise of our chosen panelists – hear contributions and ideas from the minds of the other experts sat alongside you.



## OPEX Power Talk

A fast-paced and engaging session, bringing in multiple insights around a central topic. Panelists are given 10 mins to present each of their case, and then open up the floor to the audience for discussion. You'll be given the opportunity to not only hear from the experiences of our chosen panelists, but have the chance to interact with them and those around you.



## Demo Drive

Find the next game changers in process excellence. Don't miss this engaging session where our event partners have 5 minutes to share insight, ideas and pitches on a new technology, way of working or innovative idea to the entire delegation, using the most imaginative means possible. Leave inspired and excited about the opportunities that exist which can help your organization find greater success.



## Deep Dive Workshops

Diving deep into some of your most pressing challenges in a more traditional classroom environment. Open to 25 attendees, workshops are facilitated by expert leaders who create an interactive and highly engaging session where participants are invited to share ideas, brainstorm and find the best solutions to a particular problem. Leave with a step-by-step plan to action on return to your office.



# WORLD CLASS OPEX & TRANSFORMATION SPEAKERS INCLUDE:

## Financial Services & Insurance



**Brian Williams,**  
SVP, Head of Continuous Improvement, **Voya Financial**



**Loren Bishop,**  
Vice President – Director of the Lean Management Office, **State Street**



**Hauke Schupp,**  
Vice President, Enterprise Change Management, **AMERICAN ADVISORS GROUP**



**Codin Caragea,**  
Senior Vice President, Business Process Management CoE, **Riyad Bank**



**Betty Xu,**  
Vice President, Operational Excellence, **American Express**



**Rita Magann,**  
Vice President Operational Excellence, **American Express**



**Dwight Harris Jr. ,**  
Senior Lean Six Sigma & Agile Consultant, **Dun & Bradstreet**



**Ryan McCormack,**  
Senior OPEX Manager, **Wawanesa Insurance**



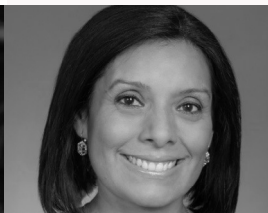
**Kush Pathak**  
Enterprise Head, Lean COE **The Standard**



**Amber Brown,**  
Director, Strategic Initiatives, **UnionBank - MUFG**



**Dietrich Fisher,**  
SVP, Director Business Transformation and Process Strategy, **BBVA Compass**



**Maria Cavero,**  
Senior Manager BPM Platform Lead, **Fidelity Investments**



**Richard Mellow,**  
First Vice President – Enterprise Agile Transformation, **SunTrust**



**Beth Schmidt,** Vice President Business Process & Project Management, **Mutual of Omaha**



**Penny Meier,**  
Vice President, Lean Deployment, **Ameriprise Financial Services**



**Vic Alexanian,**  
Director, Quality & Process Excellence, **CME Group**



**Vipul Vohra,**  
Enterprise Director, OPEX & Quality, **Aon Affinity**



**Reka Mishra,** Director Enterprise PMO Centre of Excellence, **SVB Financial Group**



**Melissa Hall-Cohn,** Vice President, Customer Experience Process Improvement, **Equifax**



**Susan Armstrong,** Senior Vice President, Global Process Improvement, **Equifax**



## Technology, Telco & B2B Services



**Mikeal Scott,**  
Manager, WW Supply  
Chain Transformation,  
**Amazon**



**Nathan Hillman,**  
Head of Performance and  
Transformation, **Ericsson**  
North America



**Kevin Goldsmith,**  
CTO, **AVVO**



**Rakesh Amerineni,**  
Senior Manager, Finance  
Transformation &  
Architecture, **LinkedIn**



**Charlotte Lewis,**  
Senior Manager, Business  
process Transformation,  
**CDW**



**Bob Masterson,**  
Manager, Business  
Process Transformation  
Solutions, **CDW**



**Meagan Boson,**  
Senior Director Business  
Transformation, **ADP**



**Peter Malek,** Director,  
Process Performance and  
Operational Excellence,  
**VMware**



**Rakhi Seth-Forrest,**  
Manager Operations  
Process and Consumer  
Fraud, **HBO**



## Manufacturing, Pharma, Biotech & Healthcare



**Ricardo Estok,**  
Enterprise Principle  
Leader, Global  
Manufacturing Operations  
& Council, **Johnson  
Controls**



**Cindy Young,**  
Program Manager, Fleet  
and TYCOM Enterprise  
Support, **McKean  
Defense**



**Chad Walters,**  
Six Sigma Black  
Belt, Supply Chain  
Management, **Siemens**



**Amish Chadha,**  
Director Operational  
Excellence, **SNC-Lavalin**



**Damon Werner,**  
Vice President, Business  
Optimization & Six Sigma,  
**McKesson**



**Jean Hammelev,** Vice  
President, Operational  
Excellence, **Sonora  
Quest Laboratories**



**Chuck DeBusk,**  
Vice President,  
Performance & Process  
Improvement, **Universal  
Health**



**Kevin Wojcikewych,**  
Vice President Business  
Optimization, **Labcorp**



**Dennis Narlock,**  
General Manager,  
**Catalent Pharma  
Solutions**



**William Botha,**  
Senior Director  
Operational Excellence,  
**Ultragenyx  
Pharmaceutical**





**Karen Tilstra**,  
Co-Founder, Florida  
Hospital Innovation Lab;  
Executive Fellow of  
Innovation, **Santa Clara  
University**



**Dennis Deas**,  
Managing Director,  
Enterprise Performance  
Improvement, **Kaiser  
Permanente**



**John Gomez**, Regional  
Director, Performance  
Improvement, **Kaiser  
Permanente**



**Lynn Garofalo**,  
Managing Director,  
Performance  
Improvement, **Kaiser  
Permanente**



## CPG, Retail, Travel & Hospitality



**Maximiliano Just**,  
Global Director Business  
Integration in Associate  
Services, **Coca Cola**



**Daniel Abrantes**,  
Global Change and  
Communications  
Manager, **IKEA**



**Robin Gomez**,  
Director Data and  
Analytics, **Radial**



**Jamion Berry**,  
Director of Continuous  
Improvement,  
**McDonald's Corporation**



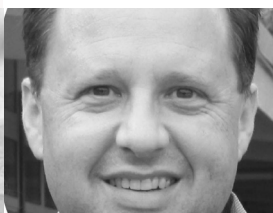
**Stella Mooraj**,  
Former Director Business  
Excellence, **Nestle**



**Jim Hinderks**,  
Global Operations &  
Continuous Improvement,  
**Hertz**



**Shane Wentz**, Global  
Director Continuous  
Improvement, **Radial**



**Jeff Foster**, Director  
Of Performance  
Improvement, **San Diego  
Zoo Global**



**Sundar Chari**,  
Director of Change  
Management, **Hertz**



**John Cottongim**  
Robotic Process Center of  
Excellence Leader

## Energy, Utilities & Public Service



**Mike Fenocketti**,  
COO, **Alameda County  
Community Food Bank**



**Dan Jarmel**,  
Director of Process &  
Quality Excellence,  
**Pacific Gas and Electric  
Company**



**Rémi Raphael**,  
Director Business  
Transformation, **Duke  
Energy Corporation**



## Inspirational speakers & thought leaders:



**Ravi Rao**, Top 20 Emotional Intelligence Expert, Author of **"Emotional Business"**

**Diane Magers**, Chief Executive Officer, **Customer Experience Professionals Association (CXPA)**

**Leslie Behnke**, Business Transformation and Operational Excellence Executive



## World class solution providers:



**Rob Stewart**, CEO, **OpusWorks**

**Aaron Bozeman**, Director, Professional Services, **iGrafx**

**Massimiliano Delsante**, CEO, **Cognitive Technology**

**Stefano Pedrazzi**, VP Sales and Marketing, **Cognitive Technology**

**Dan Griffith**, Director, **Everteam**



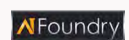
Senior Representative, **Skuid**

**Guy Kirkwood**, Chief Evangelist, **UiPath**

**Will Thomas**, Vice President, Enterprise Sales, **Signavio**

**John Huettel**, EVP Sales, **TrackVia, Inc.**

**Sid Probstein**, CTO and VP of Professional Services, **AI Foundry**



Senior Representative, **Minitab**

**Paul Docherty**, Chief Executive Officer, **i-nexus**



# INSPIRATIONAL BIG IDEAS SPEAKER

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Words are the Wings upon which Emotion flies into the world. In the world of digital transformation and innovation, it is more than ever important to focus on the human element that machines are not, or not yet at least!

Ravi began his career as a pediatric neurosurgery resident at Harvard and then shifted to become a McKinsey management consultant. In addition to acting and screenwriting, Ravi offer participative workshops to build emotional capabilities for corporate offsites and leadership development. Ravi's personal mission is to embed greater emotional awareness and emotional sophistication into the realms of creative, corporate, and community.

*Ravi is also a Dodgers Fan, Baby Whisperer, and Joke teller.*



**Ravi Rao,**  
Executive Coach, Author of "Emotional Business"

**YOU DON'T WANT TO MISS THIS FUN, EDUCATIONAL AND EMOTIONAL SESSION ON TUESDAY AFTERNOON AT 5:50PM IN THE PLENARY ROOM, JUST BEFORE THE DRINKS RECEPTION.**

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# OPEX SUMMER PRE-CONFERENCE WORKSHOPS:

## 27TH AUGUST 2018

08:00 Registration

08:30 Workshops **A1 – A4**

| Strategy Transformation Workshops   | Technology Excellence & Digital Transformation Workshops   | Customer Centric Transformation Workshops  | Innovation and Culture Transformation Workshops   |
|---|--|--|---|
| <p style="text-align: center;"><b>A1</b></p> <p><b>Leveraging Operational Excellence (OE) to anticipate, manage and minimize business risks</b></p> <p>This workshop will demonstrate how the operational excellence team at American Express guides business partners as they execute the American Express Operational Risk Framework, to anticipate and manage risks.</p> <ul style="list-style-type: none"> <li>Navigate complex Operational Risk program, which is linked to three lines of defense and 10 distinct risk pillars</li> <li>Drive efficiency for the business to assess risks from both enterprise level and end to end process level</li> <li>Provide Operational Risk analytics and reporting for business decision making</li> </ul> <p><b>Betty Xu</b>, Vice President, Operational Excellence, American Express</p> <p><b>Rita Magann</b>, Vice President Operational Excellence, American Express</p> | <p style="text-align: center;"><b>A2</b></p> <p><b>Achieving business agility through process-led digital transformation</b></p> <p>68% of companies identify agility as one of their most important initiatives to be able to respond better to market and customer demands. This workshop will outline how digital strategies will help achieve organizational agility.</p> <ul style="list-style-type: none"> <li>Developing your digital strategy starting from customer experience</li> <li>How is BPM, RPA and intelligent automation work together to contribute to organizational efficiency and agility</li> <li>Breaking down silos and develop process-led organizations</li> <li>Focusing on continuous improvement during digital transformation</li> </ul> <p><b>Peter Malek</b>, Director, Process Performance and Operational Excellence, VMware</p> | <p style="text-align: center;"><b>A3</b></p> <p><b>An integrated view on aligning business strategy and processes around the customer's needs</b></p> <p>The interactive workshop will provide insights into how world class organizations are combining CX and OPEX tools and methodologies to boost business performance:</p> <ul style="list-style-type: none"> <li>Understanding the links between customer, strategy and processes</li> <li>The functional organization vs. the customer-centric organization</li> <li>Customer and Process-centric governance model</li> <li>Customer Lab – the place to find out what are the needs of your customers</li> <li>What does the future look like? Trends &amp; predictions for the humanity 2020 - 2045</li> </ul> <p><b>Codin Caragea</b>, Senior Vice President, Business Process Management CoE, Riyad Bank</p> | <p style="text-align: center;"><b>A4</b></p> <p><b>How do you successfully implement Hoshin Planning...what I wish I'd known before I started!</b></p> <ul style="list-style-type: none"> <li>What is Hoshin planning and why does it work?</li> <li>What are typically the different stages of maturity (Crawl, Walk, Run...) and how do you know what to aim for?</li> <li>What are the typical pitfalls and how do you avoid them?</li> <li>How do you scale and sustain Hoshin planning?</li> </ul> <p><b>Paul Docherty</b>, Chief Executive Officer, i-nexus</p> |

10:00 Morning Break ☕

10:30 Workshop **B1-B4**

|   |  |  |  |
|---|--|--|--|
| <p style="text-align: center;"><b>B1</b></p> <p><b>Creating breakthrough results by aligning OPEX initiatives with business strategies</b></p> <ul style="list-style-type: none"> <li>The importance of clear business strategies in preparation for alignment</li> <li>Essential enablers for achieving strategic alignment           <ul style="list-style-type: none"> <li>Ensure appropriate input/buy-in</li> <li>Governance and management routines</li> <li>Constant leadership narrative</li> </ul> </li> <li>Challenges to strategic alignment and discussion of mitigating actions</li> <li>Empowering strategic alignment with change management approach, tools and tactics</li> </ul> <p><b>Stella Mooraj</b>, Former Director Business Excellence, Nestle</p> | <p style="text-align: center;"><b>B2</b></p> <p><b>Next generation business process optimization and simplification</b></p> <p>This practical workshop will provide case studies on how new business process management technology helps business to:</p> <ul style="list-style-type: none"> <li>Improve the agility and velocity to respond to customer demands and to embrace new business models</li> <li>Improve transparency and visibility of process performance measurement</li> <li>Ensure compliance and reduce risk of non-conformance with regulatory requirements</li> <li>Case studies of low code process management tools optimizing end to end process</li> </ul> | <p style="text-align: center;"><b>B3</b></p> <p><b>A data-driven customer experience transformation approach: Using data to re-think customer journey and re-design internal processes</b></p> <ul style="list-style-type: none"> <li>Unify disjointed customer data into one integrated system to drive deeper customer insights</li> <li>Developing an omni-channel strategy that meets customers needs at different touch points</li> <li>Developing digital capabilities internally</li> </ul> | <p style="text-align: center;"><b>B4</b></p> <p><b>Building the culture of continuous improvement in change</b></p> <p>The history of Radial is one of consistent change, development and forward momentum. Shane oversees the Radial CI program throughout 26 fulfillment centers, call centers and offices globally and he is tasked to bring an improvement culture in the changing environment to drive performance.</p> <ul style="list-style-type: none"> <li>A Radial continuous improvement journey: What have we learned?</li> <li>Developing and implementing the Radial Continuous Improvement system globally</li> <li>What can we tell from the value stream mapping from different centers?</li> </ul> <p><b>Shane Wentz</b>, Global Director Continuous Improvement, Radial</p> |
|---|--|--|--|

12:00 Networking lunch

13:00 Workshop C1-C4

C1

Measuring your OPEX effectiveness

If you can't measure it, you can't manage it. Developing business related clear cut measurement metrics and KPIs are fundamental for your continued operational excellence efforts. In this session, you will learn practical tips in effectively measure and improve your operational excellence initiatives:

- What can you measure: growth (revenue) vs. efficiency (cost) and why do they matter
• Developing business related KPIs with clear accountability
• How do link your operational excellence with business P&L
• How can you measure the non financial elements through customer and employee engagement

Loren Bishop, Vice President - Director of the Lean Management Office, State Street

C2

Realizing RPA benefits in different ways: Where to start and how to find your sweet spot

No doubt RPA is transforming the business process world at a breakneck speed. Yet, organizations are taking different approaches in starting and scaling their RPA projects. This workshop aims to provide the pros and cons of different options for you to learn from their journey and benefit quickly from RPA:

- Where to start with RPA: Understanding your processes, business objectives and scale of projects
• Comparing different RPA operating models
• How to successfully pilot your RPA project?
• Costs vs. return: how much should you invest in RPA?

C3

Capturing voice of customer to the next level

There's no doubt that Voice of Customer (VOC) is critical for businesses to succeed today, yet are you getting the right information from your various VOC programs? This session will provide practical tips in deploying the Quality Function Deployment tool to get deeper in your VOC programs.

- What do you really know about your customers?
• What framework do you have in place? And what are you doing with that information?
• Prioritizing your annual project plan designed towards meeting company strategic business objectives
• Assessing whether you have a sustainable value proposition

Dwight Harris Jr., Senior Lean Six Sigma & Agile Consultant, Dun & Bradstreet

C4

Developing leadership behaviors for a lean enterprise and fostering lean thinking

As a PEX award winner, Catalent has developed a true lean culture and this workshop will demonstrate some of the key elements to consider to make the culture shift possible:

- Doing it right at the basic level: Setting guidelines for achieving daily excellence
• Leading change with a purpose: Making a meaningful impact on customers/patients
• Driving performance through empathy, responsibility and accountability
• Celebrating, rewarding and sustaining high performing teams
• The role of top management in driving change and making positive impact

Dennis Narlock, General Manager, Catalent Pharma Solutions

14:30 Afternoon Break

15:00 Workshop D1-D4

D1

Global supply chain digitization and progression: Imperative changes, future looking methods and new technologies

With the growth of digital supply chain, the internet of things, customer/supplier collaboration, advanced data analytics, and information requirements from customers, breakdowns in data quality can be just as costly as poor product quality. You will learn practical tools in ensuring the data quality throughout your digital supply chain:

- The growth of customer data portals, current customer data needs
• Share examples of poor data that impacts end users
• Available tools for maintaining real-time data integration (including Blockchain)
• Methods for automating transmission of data between supply chain elements using specialized barcode standards and scanners

Chad Walters, Six Sigma Black Belt, Supply Chain Management, Siemens

D2

Empower your processes and leverage RPA to stay ahead in the era of digital transformation

(Please bring your laptop) During this workshop you shall redefine operations of a real case by the use of the most efficient solution for automatic process discovery, compliance and performance verification, the identification of automation opportunities, RPA implementation and monitoring for continuous operational improvements.

- A clear understanding of how processes can be automatically discovered and how the levels of automation can be identified
• The fundamentals of ensuring compliance
• A deeper knowledge of how to analyze process performance, costs and crucial areas of improvement
• Implement RPA for continuous monitoring and constant revelation of improvement opportunities

Massimiliano Delsante, Chef Executive Officer, Cognitive Technology

Stefano Pedrazzi, VP Sales and Marketing, Cognitive Technology

D3

Finance business architecture & transformation focused on customer experience

- Defining customer focused finance business transformation & architecture strategy
• Alignment of finance business architecture and customer experience to deliver meaningful and lasting business transformation
• Delivering business value to customers through scalable, efficient and compliant business architecture
• Key success factors and considerations for successful implementation of strategy

Rakesh Amerineni, Senior Manager, Finance Transformation & Architecture, LinkedIn

D4

Design Thinking (DT) for new ways of problem solving and business Success

During this hands-on session, participants will gain fresh perspectives on problem solving, learn DT mindsets that support break thought thinking, and take away specific example how DT works in various settings.

- Learn about the 5 spaces of Design Thinking (DT), build a rapid-fire DT tool-kit and learn how to use these spaces to become a better problem finder and solver
• Real life case studies highlighting how DT has worked inside one of the nation's largest hospital system, education and the business world
• A brief overview of how to create a DT lab and key elements that keep it relevant and sustainable

Karen Tilstra, Co-Founder, Florida Hospital Innovation Lab; Executive Fellow of Innovation, Santa Clara University

16:30 End of workshop day



# OPEX SUMMER MAIN CONFERENCE DAY 1: TUESDAY, 28TH AUGUST 2018

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07:30 Registration & Coffee ☕

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08:15 **Chair's opening for OPEX Summer: Business Transformation Leaders Summit**  
Leslie Behnke, Business Transformation and Operational Excellence Executive

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08:30 **Plenary Keynote**  
**A global progression of business and digital transformation to be customer obsessed: An Ericsson case study**

- What does Ericsson's transformation framework look like?
- Aligning strategy transformation with tangible and measurable initiatives
- Developing customer obsessed processes and metrics
- Measuring the performance from the customers perspectives
- What's next on our digital transformation agenda?

Nathan Hillman, Head of Performance and Transformation, Ericsson North America

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08:50 **Plenary Keynote**  
**Redefine business excellence in the new age: A new success recipe through service, innovation and organizational agility**  
Companies face competition from not only traditional players in the same market place, but also the disruptive brands who have build their business models around their customers and have no legacy systems and a very flat and agile organizational structure. Understanding how the core principles of operational excellence are carried through these innovative companies can bring enormous values for both traditional and new market players.

- Developing business excellence through customer obsession, innovation and employee engagement
- How can operational excellence play a role in an environment where disruptive innovation dominates the culture
- Developing a process framework where continue improvement thrives

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09:10 **Sponsored Keynote**  
**Gearing up for digital transformation: Refining your business and technological architecture for the digital age**

- Key approaches for designing and implementing successful digital transformation
- Building a technological infrastructure for digital age: An integrated system
- Adapting to the future workforce: knowledge, process & insights

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9:30 **Plenary OPEX Power Talk**  
**OPEX Power Talk Round 1: Innovation**  
3 speakers will give 10 min powerful TED style innovation and transformation case studies they have implemented in their organizations. Pure value delivered in the most compact and powerful way.

**Build a fail-safe autonomous team culture to drive innovation and agility**

- A new way to increase innovation through the company culture
- Improve organizational agility without losing accountability
- Develop data-driven decision making processes

Kevin Goldsmith, Chief Technology Officer, AVVO

**Innovation program case study from biotech industry**

- Outlining the innovation program from Ultragenyx
- Kaizen principles driving innovation

William Botha, Senior Director Operational Excellence, Ultragenyx Pharmaceutical

**Master the secret of sustained innovation: engage people and optimize process fast**

- Foster innovation in a large organization
- Real innovations are not just from the labs: Engage employees to have a fail fast mindset

Vipul Vohra, Enterprise Director, OPEX & Quality, Aon Affinity

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10:10 Coffee Break ☕

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10:40

**Plenary keynote panel**

**A Transformation leaders panel: Spearhead your transformation from people, technology and process perspectives**

Transformation is not a business advantage: It is a business imperative in 2018. Join this keynote panel session and hear transformation chiefs from leading organisations dissecting key strategies, tactics and potentially pitfalls to avoid along the transformation journey.

- Tying strategic planning, enterprise PMO, Process excellence, digital innovations together for an end to end strategic transformation blueprint
- Where do you allocate your resources with so many competing priorities?
- Building the transformation backbone with the people: what's the right approach to lead your transformation and get your people on board?
- How to move quicker and become more agile in decision making throughout your transformation?

Panellists include:

**Kevin Goldsmith**, Chief Technology Officer, AVVO

**Jean Hammelev**, Vice President, Operational Excellence, Sonora Quest Laboratories

11:40

**Plenary case study**

CASE STUDY

**A progressive operational excellence for sustainability and performance**

Penny will share a unique sustainability framework that Ameriprise has tightly weaved into their business and performance structure to achieve sustained business improvement and performance.

- Introducing Ameriprise Sustainability Framework and how its adding value to performance improvement
- Effectively using the framework to continue building capability and competency and drive business goals
- Build and sustain the momentum of a lean community
- Weaving the framework into the performance management structure to ensure culture transformation

**Penny Meier**, Vice President, Lean Deployment, Ameriprise Financial Service

12:00

Lunch 

13:00

**Interactive Discussion Groups (IDG)**

Max 15 attendees per table per rotation. Make your selections early to avoid disappointment.

**1st Rotation:** 13:10pm – 13:45pm **2nd Rotation:** 13:50pm – 14:25pm **3rd Rotation:** 14:30pm – 15:05pm

**Strategy Transformation**

**IDG A: Adapt to and continuously improve in the new digital world**

- The need to adapt: Why traditional OPEX professionals need to change now?
- What are the traditional improvement concepts and perceptions that need to be refreshed?
- How to upgrade your skillsets and toolkits to adapt to the digital world?

**Ryan McCormack**, Senior Operational Excellence Manager, Wawanesa Insurance

**IDG B: Developing company wide continuous improvement capabilities: Approaches and strategies**

- Developing a roadmap from OPEX strategy to execution
- What are the capability plans for the OPEX roadmap
- Driving OPEX across the entire organization: It is here to stay

**Jamion Berry**, Director of Continuous Improvement, McDonald's Corporation

**IDG C: Leading through the change to drive business transformation**

- Crafting a transformation vision that is relevant to different teams
- Developing a framework with key steps and responsibilities
- Transformation is here to stay: Aiming for long term sustainability

**Dan Jarmel**, Director of Process & Quality Excellence, Pacific Gas and Electric Company

**IDG D: How to measure and communicate the success of the OPEX program?**

- Developing KPIs and metrics to measure your OPEX effectiveness
- Telling a tale of growth instead of efficiency
- Building a business case by demonstrating quick ROIs

**Vic Alexanian**, Director, Quality & Process Excellence, CME Group

**IDG E: Launching a successful process Centre of Excellence to bring about tactical success and tangible project savings**

- Stakeholder management, getting the right role mix for the CoE, and ensuring adoption of governance and standards
- Continually growing value and process participation throughout the enterprise

**Aaron Bozeman**, Director, Professional Services, iGrafx

**IDG F: A progressive OPEX: What happens after 10+ years of continuous improvement?**

- Changing the way you change to drive sustainable improvement
- Seizing improvement opportunities brought by the change of business landscape
- Driving stakeholder behaviors for long term continuous improvement sustainability
- Re-aligning with new business objectives and strategies

**Amber Brown**, Director, Strategic Initiatives, UnionBank - MUFG

## Technology Excellence & Digital Transformation

### **IDG G: RPA Piloting: What does it take to launch a successful RPA program?**

- How to bring in the solutions and sell it across the organization?
- Identify and engage the right stakeholders to launch RPA pilot
- Evaluating and communicating the pilot results to prepare for scaling up

**John Cottongim**, Robotic Process Center of Excellence Leader

### **IDG H: RPA Scale up: Overcoming key challenges through operationalizing RPA**

- Building internal Robotics capabilities
- Developing a repository of process pools for operationalizing RPA
- Developing an effective RPA governance structure

### **IDG I: RPA & Cognitive computing: Achieving end to end intelligent automation**

- Understanding different roles of RPA and cognitive technologies in process optimization
- Where does cognitive take over in the intelligent automation journey?
- Going beyond the buzz to create business impact with cognitive capabilities

### **IDG J: RPA & BPM: How do they work seamlessly together to drive performance?**

- How is RPA and BPM complimenting each other to ensure long term business success
- Embedding RPA in your BPM infrastructure to create maximized business result

### **IDG K: Machine Learning & AI: Cutting through the buzz and focusing on business value**

- How is business intelligence playing a more important role in today's business transformation efforts
- Developing a business intelligence framework by having business and IT collaborating with each other

### **IDG L: OPEX & Analytics - A new data driven OPEX reality**

- The increasing role of data & analytics in the new OPEX reality
- Going beyond reporting with your data – driving insights and empowering decision making through data
- Integrating your data sets to ensure consistency and accuracy

### **IDG M: Rise of business architecture: How is BA playing a key role in driving business growth**

- Planning and developing business capabilities that are aligned with business strategy
- Executing OPEX initiatives through a BA roadmap

## Customer Centric Transformation

### **IDG N: Connecting the dots through customer journey**

- Journey maps create a story, what story are you telling your customers?
- Technology vs. sticky notes: what's the best way to create a journey map?
- How to use journey maps to drive operational and process change?

**Sundar Chari**, Director of Change Management, Hertz

### **IDG O: Customer co-creation: How are you actually implementing it?**

- How to get your customer engaged in not only providing feedback but new ideas
- Evaluating and implementing innovative ideas to drive customer satisfaction

### **IDG P: Design thinking: A customer centric process redesign**

- Re-engineer end to end process with a customer's lens on where the value lies
- How is innovative technology enhancing design thinking methodologies

**Session reserved for Skuid**

### **IDG Q: Creating improvement programs to solve the customer pain points**

- How to effectively transform call centers to improve customer experience
- Leveraging call center insights to drive performance improvement

**Rakhi Seth-Forrest**, Manager Operations Process and Consumer Fraud, HBO

## Innovation & Culture Transformation

### **IDG R: Master the secret of sustained innovation: engage people and optimize process fast**

- Exploring effective ways of leading and sustaining change
- Ensuring ownership, responsibility and accountability are developed, communicated and followed through

**Reka Mishra**, Director Enterprise PMO Centre of Excellence, SVB Financial Group

### **IDG S: An agile approach to business transformation**

- Delivering value and driving speed at the same time
- Integrating Business and IT with agile transformation

**Richard Mellow**, First Vice President – Enterprise Agile Transformation, SunTrust

### **IDG T: OPEX sustainability: What are the best practices in keeping up the momentum?**

- Building a holistic system of environmental support that allows an improvement culture to sustain
- The important role of leaders in OPEX sustainability: How to keep them actively involved
- Constantly upskilling and training the workforce to ensure the DNA is passed on

**Jim Hinderks**, Global Operations & Continuous Improvement, Hertz

14:55 Solution Providers Demo Drive (40min)

15:35 Afternoon Break ☕

16:05

| Track A:<br>Strategy Transformation  | Track D:<br>Technology Excellence & Digital Transformation   | Track C: Customer Centric Transformation   | Track B: Innovation & Culture Transformation   |
|--|--|--|--|
| <p><b>Strategic OPEX Governance: Aligning continuous improvement with company strategies</b></p> <ul style="list-style-type: none"> <li>Identifying the key company strategies and communicating to the PMO for alignment</li> <li>Optimizing resource allocation for strategic and needle moving initiatives</li> <li>Governance: identify potentially opportunity for improvement and mapping them out for execution</li> <li>Tracking and measuring the results for continuous improvement and ensure the results are aligned with strategic objectives</li> </ul> <p><b>Kevin Wojcikewych,</b><br/>Vice President Business Optimization, Labcorp</p> | <p><b>Case study: Building a centre of excellence for RPA scale up to accelerate digital transformation</b></p> <ul style="list-style-type: none"> <li>Developing a center of excellence (COE) to scalable and effective competencies and capabilities</li> <li>Designing and ensuring the right mix of skillsets and roles for COE</li> <li>Gaining quick wins to transform into entering enterprise-wide adoption</li> <li>Ensuring governance for sustainability</li> </ul> | <p><b>Forget about the tools: Start your transformation with customers at heart!</b></p> <ul style="list-style-type: none"> <li>IKEA's multi-channel transformation initiative to expand the instore experience to a seamless customer experience</li> <li>Deep change: Changing fundamentally our supply chain to accommodate needs of our customers</li> <li>Our approach: A value based and customer centric transformation</li> <li>Defining leadership responsibilities and developing leadership capabilities</li> <li>Managing change on individual and relationship level</li> </ul> <p><b>Daniel Abrantes,</b> Global Change and Communications Manager, IKEA</p> | <p><b>Case study: Lead with respect: Story of a sustainable cultural transformation at The Standard</b></p> <ul style="list-style-type: none"> <li>Transforming 50% of workforce through Lean production &amp; management systems</li> <li>A coaching based approach to engage leadership and influence the culture</li> <li>Measuring the outcome to ensure the transformation is on the right track</li> <li>Building internal capability to sustain improvement</li> </ul> <p><b>Kush Pathak,</b> Enterprise Head, Lean COE, The Standard</p> |

16:35 5 minute changeover

16:40

|  |  |   |   |
|--|--|---|---|
| <p><b>Best practices in developing leadership behaviors across the entire enterprise</b></p> <ul style="list-style-type: none"> <li>Deploying lean management across operations, sales, IT and all the key function to build a lean infrastructure</li> <li>How is leadership behavioral making a huge impact to driving a continuous culture</li> <li>A top down approach: Start from the top level executives with the formal leadership development curriculum - and deploy at scale</li> <li>Getting senior executives immersed with the continuous improvement work: what are the practical tips</li> </ul> <p><b>Brian Williams,</b> SVP, Head of Continuous Improvement, Voya Financial</p> | <p><b>Case study: Deploying an end to end intelligent automation</b></p> <ul style="list-style-type: none"> <li>Maturing your digital capabilities from BPM to RPA to AI</li> <li>Implementing RPA and lessons learned</li> <li>Transitioning the work force</li> <li>Effective stakeholder management to ensure sustainability#</li> <li>Leveraging AI up-stream to RPA to create true transformational: An end to end automation</li> </ul> <p><b>Dan Semmens,</b> Managing Director Transformation, ATB Financial</p> | <p><b>Driving client centricity across the organization and how is data connecting all the dots: A Radial case study</b></p> <p>This session will showcase the pioneering work Robin and his team at Radial have been implementing to transform customer experience.</p> <ul style="list-style-type: none"> <li>Turning siloed data into unified insights across the entire organization</li> <li>Driving strategy alignment through operational excellence initiatives</li> <li>Implementing RDA projects to provide a seamless customer journey</li> <li>Connecting disparate data sources across the organization: Preparing for robust predictive analytics, internal KPIs to drive unification and real time decision making</li> </ul> <p><b>Robin Gomez,</b> Director Data and Analytics, Radial</p> | <p><b>A structured approach to drive business agility</b></p> <p>This session will outline a structured framework and key elements in driving enterprise wise business agility and high performing teams.</p> <ul style="list-style-type: none"> <li>What are the key pillars that define business agility</li> <li>Think systemically: driving enterprise agility through a dedicated enterprise PMO</li> <li>Create a culture of continuous improvement to drive business performance</li> <li>Designing an agile business structure where functional teams can work together for better collaboration</li> </ul> <p><b>Beth Schmidt,</b> Vice President Business Process &amp; Project Management, Mutual of Omaha</p> |
|--|--|---|---|

17:00 5 minute changeover

17:05

**Case study: Leveraging low code technology to achieve your business process vision**

- Aligning business architecture and strategy to enhance business transformation
- Developing an effective process ownership model to achieve the next level of efficiency
- Deliver strategy linked projects through strategic PMO
- Leveraging the role of technology as an enabler: Why low code?

**John Huettel**, EVP Sales, TrackVia, Inc.

**Driving business stability and agility from digital re-invention**

- Digitising content and process to create a stable digital backbone for your business transformation
- Managing complex workflows in a seamless solutions for simplicity and agility
- Developing an internal culture to embrace technology change

**Dan Griffith**, Director, Everteam

**Link customer journeys to internal processes across the end-to-end value chain to ensure customer-centric transformation**

- Designing, mapping and recording customer journeys to identify customer pain points
- Re-designing operational processes to meet the customers demands

**Will Thomas**, Vice President, Enterprise Sales, Signavio

**Using Design Thinking to facilitate Innovation**

- Matching the Methods to your Objective – focusing more for new products, new customer experiences, transformative change
- Design Thinking Using an Agile Framework (3-6-9 Triangle)
- Understanding key considerations on getting started
- 4 phases for accurate execution: Comprehension – Ideation – Prototyping – Evaluation
- Case studies and business cases from BBVA

**Dietrich Fisher**, SVP, Director Business Transformation and Process Strategy, BBVA Compass

17:45 Inspirational/Fun + interactive plenary

**Emotional business: How to use emotion in business to drive your innovation and transformational agenda**

Our inspirational speaker Ravi Rao MD PhD, is a culture transformation catalyst for large organisations. Through a combination of diagnostic assessment and experiential workshops for both executives and frontline associates, Ravi uses individual guidance and advising on people systems to create the conditions for fundamental change to occur. His book "Emotional Business: Inspiring Human Connectedness to Grow Earnings & The Economy" (2012) remains in the Top 3000 books on Amazon across multiple business subcategories four years after its release. Based on his experience as a neuroscience expert and former McKinsey consultant, Ravi has developed an emotions-based approach to improving financial performance in multinational companies and will share this with you in a workshop and as a plenary closing activity. Ravi's clients in five continents span across many innovative sectors including entertainment, retail fashion, and financial services.

**Ravi Rao**, Executive Coach, Author of "Emotional Business"


**18:15 PEX Party with Transformation Leaders**

**Besides curating great content, PEX is also good at throwing parties to help you unwind and make some new friends in a much more relaxed setting! Our fun-loving community members and summit attendees always find the PEX parties a must attend event. Grab yourself a glass of bubbly, immerse yourself in the beautiful summer evening in San Diego and time to have some fun!**



# OPEX SUMMER MAIN CONFERENCE DAY 2:

## WEDNESDAY, 29TH AUGUST 2018

07:30 Registration & Coffee 

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08:20 Chairperson's opening remarks and welcome  
**Leslie Behnke**, Business Transformation and Operational Excellence Executive

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08:30 **Plenary Fireside chat**  
**Leading the digital change with a customer edge: Mobility, Analytics and AI driving the future of customer experience**

- Transform your business starting from transforming your customer experience
- What are digital savvy customers look for in your product and services
- How are technologies such as mobility, analytics and AI driving new ways of improving customer experience

**Michael Lawder**, Senior Vice President, Customer Care, Samsung (Invited)

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08:50 **Plenary keynote case study**

CASE STUDY

### **Build market and customer trust with process excellence internally and externally, when it matters the most!**

In early 2016, Equifax established a Customer Experience process improvement team to refine the company's CX vision and deliver on CX-related initiatives. CX has become a cornerstone in their business. This joint presentation will outline the origin of CX process improvement, the mechanics of incorporating CX into operational excellence, and key areas of process improvement focus going forward.

- Origin of CX process improvement
- A top down approach led by senior executives (Customer Experience Council)
- Identifying initiatives to support the vision
- Utilizing customer personas, customer journey mapping, and gap analysis to really transform customer experience and deliver the customer vision
- Growing an enterprise-wide transformation program to support customer transformation and operational excellence
- Digital enablement for the next level of business excellence: Developing robotics and self service capabilities

**Melissa Hall-Cohn**, Customer Experience Process Improvement Specialist, Equifax  
**Susan Armstrong**, Senior Vice President, Global Process Improvement, Equifax

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9:20 **Plenary case study**

CASE STUDY

### **20 years of continuous improvement - McKesson's transformation based on lean, six sigma, automation and business redesign**

This year, McKesson celebrates their 20 years anniversary since starting their lean six sigma journey. There have been changes throughout the years along with tremendous amount of learning. Damon will share the key lessons learned throughout their 20 year journey especially on achieving sustainability and longevity, whilst continuously re-engineering to adapt to the changes in the market.

- Aligning methods and policies to achieve consistency across the entire enterprise (methodology, monetization/validation, training & certification, etc.)
- How has the umbrella of process improvement evolved throughout the years with new tools to spark innovation
- Why have some business unit programs failed? - Re-directing the approach and investment to become more pragmatic and focusing on change management
- Overcoming challenges the new journey begins: Redesign the corporation from top to bottom and how process improvement will play a role in the implementation and go forward plan

**Damon Werner**, Vice President, Business Optimization & Six Sigma, McKesson

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9:40 **Plenary case study**

CASE STUDY


### **A smart utility transformation case study: Identifying digital opportunities and transforming key functions and operations for agility, efficiency and security**

- Identifying and evaluating digital opportunities across the organization to implement digital strategies where you can create the biggest business impact
  - Implementing AI level of analytics to provide speedy response to customer demands: sharing real life examples
  - Digitizing key functions including supply chain and finance
  - How is Analytics, Design thinking and Operational Excellence teams work collaboratively to deliver enterprise level transformation
  - Working on strategies with HR organization to reskill employees for the future
- Rémi Raphael**, Director Business Transformation, Duke Energy Corporation
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10:00 **Plenary panel**  
**Incorporating design thinking in strategy planning and process improvement framework**

- How can design thinking be incorporated in your strategy planning
- Developing a framework and toolkits for design thinking
- Encouraging human-centred innovation through design thinking

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10:20 Morning break 

| Track A:<br>Strategy<br>Transformation   | Track D:<br>Technology<br>Excellence & Digital<br>Transformation  | Track C:<br>Customer Centric<br>Transformation  | Track B:<br>Innovation & Culture<br>Transformation   |
|--|---|---|--|
| <p><b>The future state of mind for business and digital transformation</b></p> <ul style="list-style-type: none"> <li>• An outside-in approach: Change the way you change with a focus on your customers</li> <li>• What is the end game for digital transformation</li> <li>• How to design your process for the digital age</li> </ul> <p><b>Hauke Schupp</b>, Vice President, Enterprise Change Management, AMERICAN ADVISORS GROUP</p> | <p><b>Business intelligence accelerating business transformation</b></p> <p>Fostering a data-driven organization emboldens the vision of faster and better-informed decisions to compete in the digital economy.</p> <ul style="list-style-type: none"> <li>• How is data analytics assisting you with better decision making</li> <li>• How is the development of big data and Natural Language processing helping the advancement of business intelligence</li> <li>• Developing a Business Intelligence strategy for your transformation</li> </ul> <p><b>Sid Probstein</b>, CTO and VP of Professional Services, AI Foundry</p> | <p><b>Creating business and customer impact using a Human-Centered Design mind-set:</b></p> <ul style="list-style-type: none"> <li>• Challenges and wins from redesigning operations from "inside-out" to "outside-in"</li> <li>• Design thinking case study: incorporating voice of the customer feedback into the design of the service experience</li> <li>• How skilled volunteers are becoming the future of operational excellence for non-profits</li> <li>• The future of scaling up the human-centered design mindset to create customer value</li> </ul> <p><b>Mike Fenocketti</b>, Chief Operating Officer, Alameda County Community Food Bank</p> | <p><b>Employee empowerment: Using military tools to support your organizational culture</b></p> <p>Expecting everyone on your team to know what decisions they can make at their level may be common assumption, but it may not always be true. If you would like to learn how to empower your employees to make informed decisions and save valuable time in your day, this session will provide valuable insights in:</p> <ul style="list-style-type: none"> <li>• Using a version of "Standing Orders" to empower your personnel</li> <li>• Using your mission statement to better define your inclusion of your personnel in your decision-making processes</li> <li>• Encouraging retention of employees and their tacit knowledge through autonomous practices</li> <li>• Supporting innovative thought without fear</li> </ul> <p><b>Cindy Young</b>, Program Manager, Fleet and TYCOM Enterprise Support, McKean Defense</p> |

11:30 5 minute changeover

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| <p><b>Case study: Deploying blended learning for Operational Excellence</b></p> <ul style="list-style-type: none"> <li>• Assess your process improvement culture</li> <li>• Consider new strategies for accelerating your PI Culture</li> <li>• Learn new approaches for developing PI capability and delivering results</li> <li>• Learn, from a high-level, how to deploy Virtual Blended Learning, effectively</li> <li>• Assess if/how Virtual Blended Learning can apply to your PI Culture</li> </ul> <p><b>Rob Stewart</b>, CEO, OpusWorks by The Quality Group</p> | <p><b>Combining BPM &amp; Technology to accelerate scale and efficiency: A Fidelity Investment Digital Transformation Case Study</b></p> <ul style="list-style-type: none"> <li>• The journey of process analysis, design and automation: Streamline, simplify and automate key elements of the process</li> <li>• Implement a solution that meets Fidelity's and our sub-adviser's rigorous security standards</li> <li>• Putting together a team that drives change and transformation</li> <li>• Build for the future: next steps</li> </ul> <p><b>Maria Cavero</b>, Senior Manager BPM Platform Lead, Fidelity Investments</p> | <p><b>Truly understand your customers for personalised and effortless service</b></p> <ul style="list-style-type: none"> <li>• How much do you truly understand your customers: Analyse consumer data and embed that into your operating model</li> <li>• How personalised can you be? Giving customers exactly what they want, exactly when they want it</li> </ul> | <p><b>Employee empowerment: A value based approach: Continuously driving value and process participation</b></p> <p>For the past 10 years, Chuck has been responsible for driving effectiveness with a large and very spread out organization of 85,000 employees. This case study will highlight their approach to constantly getting things done and create patient value.</p> <ul style="list-style-type: none"> <li>• What can we learn from Bruce Lee to personalize your operational excellence approach</li> <li>• Sharing examples of driving continuous improvement</li> <li>• Coping with the new challenges as industry, market and customers change</li> </ul> <p><b>Chuck DeBusk</b>, Vice President, Performance &amp; Process Improvement, Universal Health</p> |
|--|--|--|--|

12:05 5 minute changeover

12:10

**How not to sink a transformation - A world class manufacturing excellence system deployment**

- Demonstrate leading and lagging metrics to show significant year-over-year (YOY) improvements and sustainment in safety, turnover, quality, productivity, cycle times, customer satisfaction, energy savings and cost savings within 2 years of deploying the JCMS.
- This presentation focuses on what the tangible key success factors are, and what traps could hinder a manufacturing system to deliver measurable sustained value.
- what to do and what not to do in order to deploy, implement and sustain, across multiple business and regions, an enterprise manufacturing system

**Ricardo Estok**, Enterprise Principle Leader, Global Manufacturing Operations & Council, Johnson Controls

**Creating value from data: ADP's data driven business transformation case study**

Meagan will share successful initiatives in driving ADP's \$2billion National Account Services Business Unit transformation.

- Aligning NPS to internal metrics for associate and client experience
- Leveraging change management to gain adoption of new processes and tools
- Making data your 7th sigma: Uncovering insights beyond the six sigma layer and turning the needle on client experiences
- Sharing experiences in recent Chabot design and implementation based on design thinking methodologies

**Meagan Boson**, Senior Director Business Transformation, ADP

**Customer centric process improvement and Robotic Process Automation driving revenue, compliance and customer experience**

- leverage process improvement as a competitive advantage to improve client experience
- Using root cause analysis and performance analysis in customer complaints department
- Embedding RPA in the performance improvement structure for enhanced customer and employee experience

**An enterprise transformation towards becoming a lean six sigma organization – A CDW case study**

- Understanding and influencing customer behaviors
- Evolving capabilities of continuous improvement and patterns
- Accelerating innovation with digital transformation and people capabilities

**Charlotte Lewis**, Senior Manager, Business process Transformation, CDW

**Bob Masterson**, Manager, Business Process Transformation Solutions, CDW

12:40 Lunch 🍴

13:40 **Plenary keynote**

**Rethinking strategy, structure and processes to create a new environment where people and customer experience thrive everyday**

- What does a true customer-centric organization look like
- Reshape and re-tool to become more customer-centric in process, mindset and behaviours
- Calculating the business value and impact of change
- Steps to turn-around to a new way of thinking

**Diane Magers**, Chief Executive Officer, Customer Experience Professional Association (CXPA)

14:10 **Keynote Case study**

**A human centered design for enhanced customer experience and sustainable innovation**

- Gathering feedback and customer needs for today and in the future: A human centered design
- Putting a process in place to make rapid improvement to enhance customer experience
- Using data with stories and stories with data
- Empower the leadership team and train employees to be more customer focused that creates an improvement culture

CASE STUDY

**Dennis Deas**, Managing Director, Enterprise Performance Improvement, Kaiser Permanente

**John Gomez**, Regional Director, Performance Improvement, Kaiser Permanente

**Lynn Garofalo**, Managing Director, Performance Improvement, Kaiser Permanente

14:40 Afternoon Break ☕

15:10 **Plenary OPEX Power Talk**

OPEX Power Talk Round 2: Culture

3 speakers will give 10 min powerful TED style culture transformation case studies they have implemented in their organizations. Pure value delivered in the most compact and powerful way.

**Shane Wentz**, Global Director Continuous Improvement, Radial



15:45

**Keynote Plenary panel**

**Looking into the future state of process, people & technology to link critical elements together and deliver greater transformation result**

In this plenary panel discussion, our industry thought leaders gather again to provide a more thought-provocative discussion on the future state of Operational Excellence through predicting the changing landscape in people, process and technology and provide all the attendees some food for thought and take away tips for overcoming tomorrow's challenges.

- Future of business process: Developing end to end process-led and customer-led agile organizations
- Future of people (workforce): Digital workforce vs. Gen Z workforce – which one poses greater challenges to your business?
- Future of Technology: From process optimization to intelligent automation and AI
- Future of the Customer: Embracing the customer's digital life for your business

Panellists include:

**Jean Hammelev**, Vice President, Operational Excellence, Sonora Quest Laboratories

**Mikeal Scott**, Manager, WW Supply Chain Transformation, Amazon

**Panel Moderated by: Hauke Schupp**, Vice President, Enterprise Change Management, American Advisors Group

**Reka Mishra**, Director Enterprise PMO Centre of Excellence, SVB Financial Group

16:30

**End of OPEX Summer 2018**

**OPEX SUMMER: POWERED BY PEX NETWORK:**



How is BPM, RPA and intelligent automation work together to contribute to organizational efficiency and agility? The Process Excellence Network is a global community for process professionals, business leaders and executives who want to improve their businesses through process and operational excellence. With a global membership of over 145,000+ and a burgeoning global portfolio of live events, webinars, and networking opportunities, our mission is to inspire and inform our members with access to practical advice on business improvement tools, methodologies and technologies in order to achieve their business goals. Join the largest global network of people passionate about process improvement today at [PEXNetwork.com](http://PEXNetwork.com)

# OPEX SUMMER SPONSORS

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[www.aifoundry.com](http://www.aifoundry.com)

AI Foundry, a Kodak Alaris business unit, transforms enterprise operations by integrating information, people and processes to enable increased insight and improved decision-making. Our Actionable Intelligence Management solutions help organizations streamline and automate manual processes, seize new business opportunities and manage compliance, all while driving bottom-line performance. Our team provides both the solutions and expertise to accelerate an organization's digital transformation journey.

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[www.my-invenio.com](http://www.my-invenio.com)

myInvenio is an enterprise-class automated business process discovery software that is able to automatically design the organization processes by reading the structured & unstructured organization information.

myInvenio automatic designs business flows and social networks by analyzing corporate sources (ERP, CRM, SFA), from application log files, documents, email messages, and from "social signals". It supplies Business Process Predictive Analysis, Process bottlenecks identification and optimization. myInvenio is a Cognitive Technology product

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[www.everteam.com](http://www.everteam.com)

Everteam is a leading provider of process automation and information governance solutions.

everteam.process is a process automation solution that empowers rapid, end-to-end business transformation. It is based on an open standards business process engine and easily connects with data sources and existing systems. The resulting automated processes leverage existing IT components to drive improvements in customer service while removing constraints to revenue growth.

Everteam.governance is an information governance solution framework that addresses requirements including:

- Shared Folder Content Analysis and Remediation
- Records Management
- Application Decommissioning
- Content and Data Archiving

Everteam is a global solution provider with offices in Boston (US Headquarters), Paris, Lyon, Beirut, and Dubai.

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[www.igrafx.com](http://www.igrafx.com)

iGrafX process management and analysis solutions empower organizations to achieve maximum performance. iGrafX captures and communicates the alignment of strategy, people, processes and technology, and unites the entire organization around delivering business value. iGrafX delivers strategic and operational decision support to enable our customers to become and remain world class competitors. For over 20 years, iGrafX products and services have been helping companies of all sizes across the globe manage their processes and optimize their business. For more information, please visit [www.igrafx.com](http://www.igrafx.com)

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[www.minitab.com](http://www.minitab.com)

Minitab® is the leading statistical software package used for quality improvement worldwide. Our latest solution, Qeystone®, is a project portfolio management platform designed to manage a Lean Six Sigma deployment from the initiation of a project through the reporting of key metrics and financials. Qeystone combines powerful quality tools like FMEA and value-stream mapping with a cloud-based dashboard that provides high-level reports and graphical summaries of your entire improvement program.

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by THE QUALITY GROUP

[www.opusworks.com](http://www.opusworks.com)

OpusWorks® (formerly The Quality Group) provides Operational Excellence blended e-Learning (Lean, Six Sigma, Project Management, Leadership) to get everyone on the same page prior to classes, team meetings and events. With OpusWorks, customers standardize OpEx knowledge transfer, propel sustainable culture change, and increase ROI. OpusWorks® e-Modules engage and inspire adult learners. The OpusWorks® Platform facilitates customization, streamlines delivery, enables instructors, and supports deployment leaders. OpusWorks® proudly serves corporate clients, government agencies, hospitals, and academic institutions. With our content, platform, experts, personal attention, and commitment to excellence, you will advance your deployment to a whole new level.



Signavio is a leading BPM software solution provider helping organizations achieve operational excellence through Business Process Management (BPMN) 2.0 web-based modeling, analysis, automation and process optimization. The Signavio Process Manager's support of DMN 1.1 enables you to model and analyze your business decisions within process models for better efficiency and automation. Our latest solution, Signavio Process Intelligence, allows organizations to gain insights into their real-time data to identify the weak points and act with certainty in the steps towards optimal To-Be processes. Established in 2009 with offices in Berlin, Singapore, Silicon Valley and Boston, the company stands out through its technical innovation and understanding in the area of Business Process Management as well as a pioneer in the area of collaborative process design. Signavio's BPM solution was designed to be intuitive and easy to use. The Signavio Process Manager offers a collaborative environment that includes as many process participants as desired in process design, making it possible for any organization to achieve process excellence. Register for our free 30-day BPM trial at [www.signavio.com](http://www.signavio.com)

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[www.skuid.com](http://www.skuid.com)

Skuid was founded in 2013 on the simple belief that enterprise apps should stop forcing people to behave like machines. Instead, apps should behave more like the humans who use them, so everyone can thrive in the digital world. With Skuid's simple-to-use but incredibly robust cloud design-and-deploy platform, companies can seamlessly unite their data, apps, and processes to unleash productivity and engagement, particularly in sales organizations. With hundreds of customers and more than 5.2 million users across 32 countries, Skuid has garnered national media coverage from Inc., Forbes, Fortune, Entrepreneur, TechCrunch, and others.

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[www.trackvia.com](http://www.trackvia.com)

TrackVia's next generation workflow management solution delivers the world's fastest speed to solution, helping companies gain immediate control and visibility over their operations and field work. A true low-code solution, TrackVia is fully configurable with drag-and-drop and includes a modern native mobile app with no additional development. Companies can use TrackVia to streamline a single workflow or digitize their entire operations with a centralized solution in a fraction of the time and cost of corporate systems. More than 1,000 businesses rely on TrackVia, including Honeywell, Navistar, DIRECTV, Dow, Brings and others.

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[www.uipath.com](http://www.uipath.com)

UiPath is a leading provider of Robotic Process Automation technology enabling global enterprises to design, deploy and manage a full-fledged robotic workforce that mimics employees in administering rules-based tasks and frees them from the daily routine of rote work. The UiPath RPA computing platform is dedicated to automate business processes. It provides process modelling, change management, deployment management, access control, remote execution and scheduling, execution monitoring, auditing and analytics in full compliance with enterprise security and governance best practices. For more information, please visit: <http://www.uipath.com>.

# OUR MEDIA PARTNERS

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Insight and Inspiration for Process Professionals. The Process Excellence Network is a global community for process professionals, business leaders and executives who want to improve their businesses through process and operational excellence. With a global membership of over 130,000, and a burgeoning global portfolio of live events, webinars, and networking opportunities, our mission is to inspire and inform our members with access to practical advice on business improvement tools, methodologies and technologies in order to achieve their business goals. Join the largest global network of people passionate about process improvement today at PEXNetwork.com!

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## ABPMP:

The Association of Business Process Management Professionals International is a non-profit, vendor independent professional organization dedicated to the advancement of business process management concepts and its practices.

ABPMP International is practitioner-oriented and practitioner-led.

ABPMP International has local chapters in all regions of the US with many more forming in the US and Internationally. Individuals wishing to participate who are not located near an existing local chapter are urged to investigate the feasibility of starting a chapter where they are located. While they are not affiliated with a local operating chapter, members will be part of the Members-At-Large chapter which has its own elected officers and participates in ABPMP activities as any other chapter would.

ABPMP International is governed by an elected Board of Directors. Each chapter president is an ex-officio and voting member of the International Board of Directors. ABPMP International has a Board of Advisors made up of some of the most well-known authors, practitioners and thought-leaders in the field. They are also volunteers and periodically offer the Board of Directors and chapters advice on the industry and how ABPMP can best serve its members.

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## BPI:

Networking LinkedIn group for Business Process Improvement, Quality, Six Sigma and Lean professionals who want to expand their network, share and be exposed to new ideas and tools in the industry.

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## Business Review USA:

Business Review USA & Canada is a diverse, multi-platform digital media company focusing on the North American and global B2B marketplace. Business Review USA & Canada is comprised of a group of media professionals with a passion for great content and the ability to collaborate with the World's most inspiring and innovative business leaders to deliver only the best, most engaging, and relevant content to you. With a trusted and recognized publishing portfolio that is home to over 16 brands, including: e-magazines, social media channels, and developed web platforms, Business Review USA & Canada uses a combined approach of social media campaign marketing alongside data marketing tools to deliver your organization's story in front of the executives and individuals that matter most.

### Customer Experience Professionals Association (CXPA):

Founded in 2011, the Customer Experience Professionals Association (CXPA) is the premier global non-profit organization dedicated to the advancement and cultivation of the Customer Experience profession.

The CXPA supports the professional development of its members and advances the field by providing shared best practices and education, developing standards, offering networking opportunities, promoting the industry, and creating a better understanding of the discipline of Customer Experience.

As a non-profit, the CXPA wants to help customer experience professionals make customer experience management an integral part of how their companies operate, and to enable them to embed its skill set across their organizations. Our goal is to break down the work, create standards and best practice approaches, and transfer those skills across the CXPA network.



### International Supply Chain Education Alliance (ISCEA):

The ISCEA is the developer of the internationally recognized certification programs of Certified Supply Chain Manager (CSCM), Certified Supply Chain Analyst (CSCA), Certified Lean Master (CLM), Certified RFID Master (RFIDSCM), Certified Supply Chain Technology Professional (CSCTP), and Certified Demand Driven Planner (CDDP). ISCEA is the governing body for the Ptak Prize. ISCEA members hold mid to upper supply chain management positions in Global 2000 companies. For more information, please visit [www.iscea.com](http://www.iscea.com) and [www.iscea.net](http://www.iscea.net)



### Lean Six Sigma:

A global community, uniting all White Belt (WB), Yellow Belt (YB), Green Belt (GB), Project Managers (PM), Black Belt (BB), Master Black Belt (MBB), Project Sponsor (PS), Deployment Champion (DC), Executive Leader (EL), Kaizen Practitioner or Facilitator or Lean Master, Auditors, Continuous Improvement, Management Consultants, Program Managers, Business Owners, Students, Professors, & Engineers.



### Quality Assurance and Process Improvement

The Quality Assurance and Process Engineering LinkedIn Group focuses on fostering and exchanging best practices in the areas of:

- Product and Process Quality
- Testing Best Practices
- Peer Reviews and defect reduction
- Standards, Models and Frameworks
- Process Improvement Methods



### Technology Evaluation Centers:

Technology Evaluation Centers (TEC) is the world's leading provider of software selection resources, services, and research materials, helping organizations evaluate and select the best enterprise software for their needs. With its advanced decision-making process and software selection experts, TEC reduces the time, cost, and risk associated with enterprise software selection.

Over 3.5 million subscribers leverage TEC's extensive research and detailed information on more than 1,000 leading software solutions across all major application areas. TEC is recognized as an industry-leading software selection advisory firm offering resources and services both online and onsite.

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Sponsorship opportunities are limitless at OPEX Summer



# MEET THE OPEX SUMMER 2018 TEAM

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The PEX Network team works tirelessly to bring you an unforgettable event experience, unite you with the contacts you need to speak to and accelerate your brand awareness. With many delegates, sponsors & exhibitors returning to OPEX Summer, we have the pleasure of connecting with them each year. We're looking forward to working with you and having you at OPEX Summer in the near future.



**Richard Mills,**  
Managing Director

## CONTENT & PROGRAM

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**Karen Magnusson**  
Divisional Director



**Cathy Gu**  
Event Director

## MARKETING

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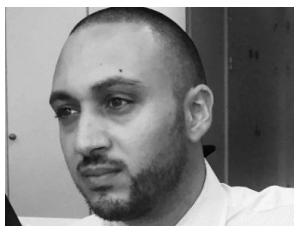
**Jamie Burton**  
Marketing Director



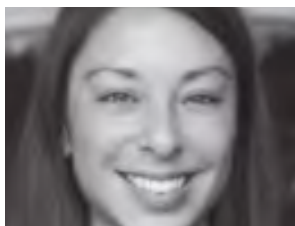
**Sophie Boyle**  
Marketing Manager

## SPONSORSHIP

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**Bertan Halil**  
Sales Director



**Zoe Henessy**  
Sponsorship Manager

## DELEGATE ACQUISITION

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**Matthew Sancto**  
Delegate Enquiries  
Director



**Samuel Caskey**  
Delegate  
Acquisition Lead

## CONTENT

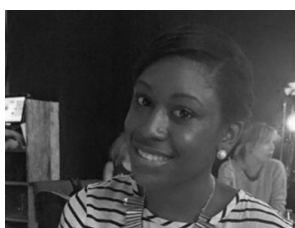
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**Aimee Jepson**  
Content Manager

## OPERATIONS

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**Danniella Ndeh**  
Operations Manager

# ABOUT THE VENUE

## Hilton San Diego Resort & Spa, San Diego, CA

1775 East Mission Bay Drive, San Diego, California 92109 USA

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Located on scenic Mission Bay, our San Diego resort is situated on an 18-acre park with lush gardens and rolling lawns, just steps from the beach. Hilton San Diego Resort & Spa is an ideal destination for exploration: Rent a bike to ride along our 28-mile boardwalk, go sailing around the bay or discover our 7,500 sq. ft. Spa Brezza.





**Package Options For In House Operational Excellence Professionals\*\***

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| Earlybird Pricing                  | \$2,199<br>SAVE \$1100 | \$1,599<br>SAVE \$1000 |
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| Pass Includes  | Business Class | Economy Class |
|--|----------------|---------------|
| Access to Main Conference & Exhibition Hall (2 Day Conference)                               | ✓              | ✓             |
| Interact, benchmark and learn from your peers with access to 3 interactive Discussion Groups | ✓              | ✓             |
| OPEX Summer Party  | ✓              | ✓             |
| Access to the OPEX Summer Networking App   | ✓              | ✓             |
| Membership to the PEX Network  | ✓              | ✓             |
| Access to Presentation Slides post event   | ✓              | X             |
| Access to Workshop Day   | ✓              | X             |
| Post-Show Access to Audio & Video Conference Presentations - PEXCAST                         | ✓              | X             |

| Solution Providers   | Business Class | Economy Class |
|--|----------------|---------------|
| Standard Price - 2 Day Pass                                    |                | \$2999        |
| Access to Main Conference & Exhibition Hall (2 Day Conference) | ✓              |               |
| Opex Summer Party  | ✓              |               |
| Access to the OPEX Summer Networking App                       | ✓              |               |
| Membership to the PEX Network                                  | ✓              |               |
| Access to Presentation Slides post event                       | ✓              |               |

**A la Carte - Add to any packages or purchase separately**

|   |       |
|---|-------|
| Access to Audio/Video Conference Presentations via our online PEXCast video store | \$799 |
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All 'Early Bird' discounts require payment at time of registration and before the cut-off date in order to receive any discount. Any discounts offered (including team discounts) must also require payment at the time of registration. All discount offers cannot be combined with any other offer.

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Family Name Job Title

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Email

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Name of person completing form if different from delegate

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Special dietary requirements: Vegetarian Non-dairy Other (please specify)

Please indicate if you have already registered by: Phone Fax Email Web

Please note: if you have not received an acknowledgement before the conference, please call us to confirm your booking.

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Total price for your Organisation: (Add total of all individuals attending):

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Account name: IQPC Ltd Bank: HSBC Account number: 551304143 Sort code: 40 38 18

IBAN: GB59MIDL40381851304143 SWIFT: MIDLGB22

21225.007

**WAYS TO REGISTER**

TELEPHONE:  
+44 (0) 207 368 9809

EMAIL:  
enquire@iqpc.co.uk

WEB:  
www.opexweeksummer.iqpc.com

**VENUE & ACCOMMODATION**

Venue:  
Hilton San Diego Resort & Spa, San Diego, CA

Accommodation: Please check  
www.opexweeksummer.iqpc.com for further information  
Accommodation: Travel and accommodation are not included in the registration fee. For updates on the venue

**TEAM DISCOUNTS\***

| Team discounts on standard rate | Teams of 3-4 | Teams of 5-9 | Teams of 10+ |
|---------------------------------|--------------|--------------|--------------|
| Book by May 4, 2018             | 40% off      | 50% off      | 60% off      |

**FREE ONLINE RESOURCES**

You can access a variety of free resources such as whitepapers, articles, news, podcasts and presentations online at [www.opexweeksummer.iqpc.com](http://www.opexweeksummer.iqpc.com)

**START KNOWLEDGE SHARING AND NETWORKING BEFORE THE EVENT**

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