

Friday, August 5th – 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.

2016 Lean Systems Summit

Friday, August 5, 2016

7:15AM-8:00AM	Registration, Networking, Continental Breakfast				
8:00AM	Welcome				
8:15AM	Opening Keynote: James Womack, Senior Advisor, Lean Enterprise Institute				
9:00AM	Transition to Learning Sessions				
Room					
9:15AM	A1: Engaging The Front Line Staff	A2: Lean Safety – A Methodology for Employee Engagement and Culture Change	A3: Creating and Executing a Lean Organization Strategy Roadmap	A4: Shingo Principles – the Mission Basics	A5: Building Capacity through Partnerships: Connecticut’s Department of Energy and Environmental Protection
10:30AM	Break - Change Learning Sessions				
10:45AM	B1: Team Engagement in Lean: Delivering Ideal Care	B2: Setup Reduction – Removing the Rocks	B3: 10 Things I Hate Most About Continuous Improvement	B4: Lean and Operational Excellence: An Enterprise wide approach	B5: Integrating Lean Tools and a Management System in a Complex Organization: Case Example-- Federal Government CMS
Noon-1:00PM	Lunch (provided)				
1:00PM	Afternoon Keynote: Karl Wadensten, VIBCO				
1:45PM	Lean Roundtable				
2:45PM	Break - Transition to Learning Sessions				
3:00PM	C1: Lean in Support Services: Deploying Company-Wide Strategy of Excellence	C2: People + Kaizen = More, Better, & Faster	C3: Creating a Lean Culture	C4: How to 5S your Leadership Skills	C5: Sustaining Your Lean Journey: A Road Map
4:15PM-4:30PM	Wrap-Up & Next Steps				
See you next year !					

Learning Session Descriptions

9:15 AM – 10:30 AM

A1: Engaging the Front-Line Staff

Christine Doucette, Process Improvement Coach, Central Maine Healthcare

In this learning session, you will learn how the Process Improvement Department has been engaging front-line staff in continuous improvement tools and techniques through training documents and other PI resources, new hire orientation, lunch-and-learn classes, daily huddles in all departments, improvement boards, and an online learning module.

Central Maine Healthcare (CMHC) is an integrated healthcare delivery system serving people living in central, western, and mid-coast Maine. CMHC includes 3 hospital facilities and a primary, specialty, and surgical care practice organization known as the Central Maine Medical Group.

CMHC has been on a continuous improvement journey since 2009. The initial focus in our journey was to train leaders in the foundational elements of continuous improvement. In order to propel the organization forward in its pursuit for cultural change, all staff within the organization must have a foundational continuous improvement knowledge and be allowed to put into practice, on a daily basis, the skills they learn. Front-line staff are a direct link to the patients CMHC serves and know first-hand the problems that exist.

The more knowledgeable and engaged the staff are, the more improvement an organization can realize.

You will walk away with –

- A better understanding of the important role front-line staff play in a continuous improvement culture.
- An understanding of how to engage and train front-line staff in developing problem-solving minds and putting into daily practice continuous improvement tools and techniques.
- Tips and tools to help engage front-line staff in continuous improvement in your own organizations.
- What types of training and materials to offer staff on continuous improvement tools and techniques.

A2: Lean Safety – A Methodology for Employee Engagement and Culture Change

Robert B. Hafey, President, RBH Consulting

Safety is a rallying point for all stakeholders. Unions, managers, front-line supervisors, and employees will all get in line and support safety.

In order to positively impact the safety culture of a business, leaders must engage their employees. Managers have to change their leadership style to that of a coach – someone who asks the right questions versus having the right answers.

Lean Safety provides business leaders a proven path to engage their employees in non-threatening continuous improvement discussions.

You will learn how to engage employees in honest safety discussions that have a dual benefit: Reducing the risk of injuries by pro-actively improving the safety of the work performed and at the same time, for example, reducing the cycle time of the work processes.

This learning session will help you to understand the strong link between Lean and safety improvement activities and how this connection can be used to engage the workforce and demonstrate respect for people:

- Highlight the connection between safety and Lean process improvements
- Demonstrate how basic Lean tools are as applicable to safety as they are to Lean.
- Turn accident/incident investigations into a continuous improvement activity.
- Include a Lean Safety Gemba Walk on which you will learn how to coach others in safety improvement identification.
- Prepare all participants to make a safety difference in their place of employment.

A3: Creating and Executing a Lean Organization Strategy Roadmap

Ronald N. Dupuis Jr., Ph.D., Director, Corporate Quality Assurance, IDEXX Laboratories
Bernie Gatchell, Operations Manager, IDEXX Laboratories, Inc.

Developing and sustaining a Lean strategy takes vision, patience, and perseverance. Many Lean strategies are abandoned because organizations cannot sustain the initial gains made during start-up. The application of tools and methods need to have a roadmap applied because it takes time for organizations to create the Lean environment and culture. Part of creating a Lean strategy is developing the future state, and the roadmap needs to be flexible to consider the skills of the organization and business changes.

This session will review the Instrument Manufacturing and Service Operation Lean roadmap at IDEXX Laboratories and its eight-year journey with a strategic roadmap that reflects a 13-year window.

Application of Lean over a long period of time requires commitment and flexibility. The organization needs to see from Leadership that, even when there are twist and turns along the roadmap, the vision and focus to improve continues. Achieving successes at each milestone along the roadmap builds confidence and trust in the strategy. We will share our experiences along the roadmap, and how -- even with change in leadership -- the strategy and roadmap can be continued. We will also share how each milestone enabled the organization to produce strong performance in order to support IDEXX customers.

We will discuss the operational results and successes achieved while following the Lean roadmap. Results include quality products, high on-time delivery, and competitive costs that allow IDEXX to sustain a leadership in its field. Advantages discussed will be the consistency of strategy application, what it takes to be diligent and focused on achieving milestones on the roadmap, and how important it is for consistency when leadership changes. The sustainability of the strategy is important for continued success in achieving True North metrics in the organization. This learning session will discuss the focus required to sustain improvements.

This roadmap has been developed in order to identify the methods and tools needed to apply Lean and to continually improve to achieve world-class operational results which align to the True North metrics of the organization. During the strategic planning process, milestones are annually updated and/or modified to reflect progress. Lean milestones such as bronze, silver, gold, and platinum teams are used to recognize progress and competency along the roadmap.

A4: Shingo Principles – the Mission Basics

Bruce Hamilton, President, Greater Boston Manufacturing Partnership
(and past Summit Keynote Speaker!)

When Shigeo Shingo, co-creator of the Toyota Production System, advised that we should “first know why and then know how,” he was referring to fundamental principles that ground the tools of Lean and make them purposeful to provider and customer alike.

While the principles are easy to understand, they are also counter to traditional business wisdom. For this reason, many would-be Lean implementers have chosen to ignore the basic principles, opting instead to layer technical aspects of Lean over outmoded strategy and organization. Today, many organizations are getting back to basics, however, and reaping the true benefits of Lean transformation.

Many organizations continue to approach Lean implementation as a set of tools that can be selected *a la carte* and implemented piece-meal to obtain productivity and quality gains. This discussion will highlight the criticality of understanding the philosophy behind the tools and treating the Lean transformation as a deep cultural, as well as technical shift, in roles and behaviours.

You will learn how the fundamental Principles of the Shingo Institute give greater purpose to the technical aspects of Lean to create a truly continuously improving environment through “key behavioural indicators (KBI’s) in order to achieve sustainable results (KPI’s) in their companies.

A5: Building Capacity through Partnerships: Connecticut’s Department of Energy and Environmental Protection (CT DEEP)

Alison Fisher, Program Director, LeanCT

Nicole Lugli, Director, CT DEEP Office of Compliance Assurance

Despite a statewide Lean operating budget of \$50,000, and a CT DEEP Lean budget of approximately the same, CT DEEP’s Lean journey is being sustained.

Join us to hear more about our story and how we’ve leveraged partnerships –

- across agency lines,
- across state lines,
- with the federal government, and
- with the private sector

to strengthen our efforts, build our internal (and external) capacity, and ensure an ongoing commitment to Lean thinking.

Building these partnerships is a challenging but powerful and key force for anyone in any sector interested in Lean and the growth and health of their organizations and systems.

10:45 AM – 12:00 Noon

B1: Delivering Ideal Care through Team Engagement in Lean

Jennifer Dieter, Vice President, JKA

Isaac B. Mitchell, Director, Continuous Improvement, East Tennessee Children’s Hospital

This session will chronicle the approach, methodology, key processes/solutions, key lessons gleaned, and results achieved by an improvement team in order to deliver ideal patient care.

You will learn about an ‘end to end’ approach to a hospital model line, the keys to engaging patients/families/ staff/providers, using a systemic approach to engaging lean, using lean principles, and designing/ implementing a lean management system -- including the healthcare mobilization model used and both the obstacles experienced and keys to success in achieving critical operational and strategic improvements for the hospital and the broader community.

East Tennessee Children's Hospital is the only children's hospital within a 150+ mile radius. Dominating the surgical market, Children's Hospital is also a primary provider of ENT, Ortho, Dental and general surgery services to the community. The Hospital initially embarked on its lean journey in 2009, and, in 2015, it partnered with a consulting service to develop a model service line appropriate for its new hospital tower's surgery expansion.

Critical to this effort was the conscious decision to recognize that the surgical service line had to be approached as a true end-to-end value stream that looked at patient, information, clinician and surgeon flows across many discreet units and departments, focusing on where the service line begins with the patient at the physician practice, flows through the hospital, and ends with follow-up with the physician.

This approach and thinking about hospitals is not the norm, for the vast majority of lean implementations in hospitals allow the 'department' and 'unit' levels within a hospital to think and behave as if they were the value stream. Many of the root causes of delays, disruption, preventable cost, poor quality, and increased risk all begin with the launch of information (or lack thereof) which is initiated well before the patient's arrival at the hospital.

What too often results (and what this team has overcome) is a series of departments working toward their unit objectives without knowledge or understanding of big picture or patient impact, resulting in sub-optimized pocket improvements.

You will learn how, at East Tennessee Children's Hospital, the team used the same lean concepts, approaches and tools to –

- a. gain a common understanding of the current process (and gaps),
- b. use lean thinking as the cornerstone to preventing problems, errors and risk across the care continuum,
- c. design solutions and gain cross-departmental acceptance, and
- d. implement and deploy solutions across 75+ surgeons, 10+ anesthesiologists/CRNA, 100+ nurses, 50+ staff members, and 20+ physician practices.

This session will highlight both department-level improvements and critical cross-departmental improvements.

**This workshop can be useful for anyone in any field, private or public. Those who work in healthcare will find it particularly relevant.*

B2: Setup Reduction – Removing the Rocks

Paul Critchley, CEO, New England Lean Consulting

Setup Reduction is perhaps the most powerful Lean tool available to us, since it has such a direct, positive effect on available equipment time. Decreasing setup time allow us to place our efforts where they belong – converting material to deliver value to their customers.

The objective of this session is to teach you about the benefits of setup reduction for your processes. In this session, we will study the differences between internal and external setups, and the positive impacts setup reduction will have on business metrics.

The benefits you can expect to realize from doing Setup Reduction include (but are not limited to):

- ✓ Increased process flexibility,
- ✓ More available processing time,
- ✓ Smaller (and possible elimination of) batches,
- ✓ Greater available floor space,
- ✓ Lower inventory levels,
- ✓ Reduced material waste,
- ✓ Standardized tooling.

You will learn how to approach and plan a setup reduction event by first identifying bottleneck processes. From there, you will learn the difference between internal and external setups, how to include front-line operators, and how to use quantitative data to drive change. Tying into the “lower the water to see the rocks” analogy, but turning it around, you will see how to analyze first, then remove the rocks, then lower the water level (inventory).

You will be able to leave this session with a full and clear understanding of the benefits of setup reduction. You will also know how to plan a setup reduction event and be able to qualify its benefits to the organization.

B3: 10 Things I Hate Most About Continuous Improvement

Rob Kilgore, Continuous Improvement Manager, GeigerGroup

I once had a teacher who encouraged (actually, demanded) experimentation and out of the box, new idea-driven thinking in his classes. He said not to be afraid of failure. In fact, he said if you are going to fail, then make it a glorious failure! His reason was, not only is greatness achieved through risk, but also that mistakes are some of the most effective teaching tools you will ever find.

Let’s face it: as engaging, and exciting as Lean and other Continuous Improvement strategies and philosophies can be, and as huge as the benefits to an organization are, there is also a great deal of frustration, false starts, and backsliding, even in organizations that do it really well. Too many organizations never can get past these, and their Improvement programs simply fade away. Meanwhile, we all go to conferences and talk about what you “should do” to make it work and what others “have done” to make it work.

But why don’t we ever talk about what not to do? We all love to share success stories, but why not share stories about our own glorious failures?

We always say in Continuous Improvement that lists of things not to do or to stop doing can have more impact than to-do lists, so let's talk about the things that drive us all crazy, and share some laughs and stories, and learn from each other's mistakes.

You will walk away from this session with a good sense of some common and avoidable mistakes and what to look out for.

B4: Lean and Operational Excellence: An Enterprise Wide-Approach

John Kim, President, Kim and Associates *(and past Summit Keynote Speaker!)*

Operating 8 facilities across the US, Mexico, and India, Caterpillar's largest supplier of exhaust systems in the world was being pressured for cost, lead time, and quality improvements at a time when global demand for off-road equipment had declined 50%.

This learning session will discuss the enterprise-wide approach that was key to driving high velocity, high impact change into a 400+ person manufacturing facility. Unlike most manufacturing transformation where 90+% of the initial focus is on the manufacturing shop, the work at this facility included 50+% of the effort simultaneously addressing and introducing multiple dimensions of innovation within the key office (support) processes that caused, inhibited and encouraged so many of the old (batch) decisions.

While breakthrough improvements are possible in any business, the pace of change and the degree of improvement is tied directly to an organization's ability to identify gaps and to innovate and improve in parallel the key processes that drive (or constrain) improvement.

In a) having the understanding and commitment at the corporate and senior and plant levels of the organization and b) having an acute understanding of the financials, it was possible to mobilize, execute and deliver transformational level results to the business that in turn delivered results, engaged staff and ultimately resulted in the creation of a Center of (Operational) Excellence for the corporation.

This session will discuss how this organization was able to use *Lean* to achieve Operational Excellence in their flagship operation and will identify the improvements and remarkable results, what approach it took to achieve them, the lessons learned along the way, and the success factors and keys to sustainability. Although many changes were made on the shop floor, it was the vision, coordination and synchronization of key improvements in master scheduling, production planning, shop floor operations, purchasing, and the re--configuration of the Enterprise System that fundamentally changed the financial model for the business.

B5: Integrating Lean Tools and a Management System in a Complex Organization: Federal Government CMS

Mindy Hangsleben, Lean Entrepreneur Fellow, Centers for Medicare and Medicaid Services (CMS)

“Exceptionalism.”

Does that apply to the government in regard to Lean? Can such an organization apply the same tools and methods as the private industry?

Yes, it can! Come learn how the Centers for Medicare and Medicaid Services (CMS) have integrated Lean methodologies as part of their daily work:

- 1- Typical Lean methodology deployment.
- 2- Tailoring Lean tools to fit the needs of government business, introducing Fed Biz Lean.
- 3- Applying Leader standard work in a government environment.
- 4- Results drive innovation, outcomes.

“Can’t work in government” doesn’t apply here. Any government entity has processes ripe for improvement opportunities. Project-based applications of Lean methodologies often fail in this arena because a true management operating system has not been included in the implementation.

You will learn about how a federal government agency, committed to the mission of improving the health of the American people through the delivery of high value and cost-effective care is implementing the Lean methodology. Through effective change management, government entities can shift how they manage and think about agency processes, approaching each process with the question of whether it provides the most value to the customer, and if not, what waste can be eliminated to meet the customer needs.

You will hear of the lessons learned and gain a better understanding of how to deal with some common resistance in a policy and politically driven environment.

This session will discuss the--

- Significant improvements in the quality of business requirement development for large system initiatives, improved process time for contract modifications, reductions in time required to complete the vetting process for applicants in payment and care delivery models, and the empowered and engaged staff excited about culture change;
- Examples of how process improvements lead to improved beneficiary outcomes;
- Bottlenecks such as resources, mindsets, and approval layers, and scaling;
- Sustainability; and
- Recommendations.

3:00 PM – 4:15 PM

C1: Lean in Support Services: Deploying a Company-Wide Strategy of Excellence

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

This session will discuss how to engage an Operational Excellence program in company support functions to generate important productivity gains, customer satisfaction improvement, and positive change in the organization.

Today more than ever, leaders recognize that a holistic effort, moving Lean initiatives beyond manufacturing or operations, is necessary to create long-term competitive advantage. To that end, it is imperative that all company and organizational functions challenge their processes and their way-of-working to focus on customer requirements, increase the speed of response, and eliminate quality variability. The improvement potential is very high: this will generate customer satisfaction and high productivity gains which can be reallocated thus creating the ability to do more with the same resources and resulting in increased competitiveness.

This company-wide effort requires a strategic intent, changes in leadership and management roles, organizational changes, and a customized roadmap built around a few key principles of operational excellence in services -- engaging on a Lean journey creating enthusiasm and generating a new company culture.

You will learn from the journey – from issues to outcomes – of how one organization applied the principles of Operational Excellence to all corporate functions and processes (Marketing, Quality, R&D, HR, Sales and Finance). You will see the benefits, bottlenecks, the key success factors and the difficulties, including leadership and management changes, and the perspectives for long term sustainability.

C2: People + Kaizen = More, Better, & Faster

Pam Vecellio, Partner, Continual Impact LLC
Chris Bujak, Partner, Continual Impact LLC

A Kaizen event relies on the knowledge and involvement of the People who perform the work. State Vital Records Offices conducted Kaizen events to improve efficiencies and enhance processes for providing timely and accurate health information used to plan and evaluate public health programs and measure the health of its populace.

Come learn how resources from >10 departments (national, state, and local jurisdictions) joined in 5-day Kaizen events to create energy, involvement, and results.

NAPHSIS (National Association of Public Health Statistics & Information Systems) and Vital Records Statistics Programs (the official record holders for birth, death, fetal death, marriage, and divorce) across the country are on a mission to provide “more, better, and faster” data to improve public health and prevent waste, fraud, and abuse.

The Kaizen event process was applied to engage process stakeholders (inside the office, outside the office-national, state, & local, data providers, and data users) as a method to ignite short and long-term continuous improvement wins. The collaboration and problem solving with all the varying process stakeholders exceeded expectations, opening up national sharing, solution replication, and seeing possibilities for further improvement.

You will learn, using Minnesota and North Carolina Office of Vital Records kaizen walk-throughs:

- What is Kaizen and the improvement methods and techniques used,
- Why use Kaizen,
- How a 5 day Kaizen is structured, and
- The substantial people impacts, such as increased energy, enthusiasm, involvement, and participation, improved relationships, enhanced improvement culture, knowledge/skill development, and improved processing and processing time.

C3: Creating a Lean Culture

Daniel Pfendt, LBC, Advanced Manufacturing Engineer, IDEXX Laboratories

Why should we do Lean?

Lean is about creating a culture of continuously seeking improvement with a focus on the value we deliver to our customer. There is a great deal of focus on individual tools and their effects on organizations, but simply applying these tools to an organization does not change its culture.

A Lean culture and what it takes to get there is the overarching goal of IDEXX Lean efforts

This session will be a walk-through of the cultural side of Lean implementation. You will learn what a Lean culture looks like and its advantages so that you and other Lean leaders are better-equipped to answer the question of ‘why should we do Lean?’

Integral to this discussion will be the eight steps of creating major change (from John P. Kotter’s Leading Change), using a real life example from our IDEXX experience.

You will walk away from this session with a broader understanding of the meaning and impact of a Lean culture. The knowledge and lessons from our IDEXX case example will help you, as Lean leaders, to be more effective agents of change in your organizations’ Lean journeys.

C4: How to 5S Your Leadership Skills

Maryanne Ross, CFPIM, CIRM, CSCP, Trainer and Consultant, Mental Apparel

Most of us are familiar with the Lean workplace organization method called 5S, and many of us have used it to make significant improvements in our factories, offices, hospitals, and even our homes. Why not take it to another level and apply the very same principles to your leadership skills?

This lively, interactive session will help you explore ways to **Sort, Straighten, Shine, Standardize and Sustain** your thoughts and actions so that you can lead yourself and others to higher achievements than you ever thought possible.

With this session you will be able to employ these new ideas immediately to:

- Sort out the negative thoughts and actions that are holding you back.
- Organize your thinking and daily activities to increase productivity for yourself and your team.
- Develop the simple habits of the highest achievers and teach them to others.
- Eliminate wasteful activities that are harmful to your health, relationships, and career!

You will be introduced to opportunities to use 5S methodology for personal leadership development. The objective is to develop leaders who are capable of managing their lives and themselves, so that they are better able to focus on the challenges of the workplace. When wasteful and harmful habits are eliminated from our lives, we are healthier, happier, and better able to make positive contributions to the workplace.

You will learn how to apply basic 5S methodology to all aspects of life. From goal setting to time management to positive thinking, this session demonstrates how the 5S steps can be applied to ourselves. You will discuss and learn how to sort out wasteful activities (including negative thinking), straighten thoughts and daily activities, shine up daily habits, create good standards of behaviour, and sustain new habits by exchanging wasteful habits and activities for new and more productive actions. You will go home with worksheets and templates so that you can begin to implement new habits immediately.

Participants, both newcomers and experienced practitioners, can expect a new ability to set and achieve goals, to improve and heal damaged relationships, and to model better behaviours in the workplace and with their teams

C5: A Road Map to Your Sustainable Lean Journey

Tony Rodriguez, President, Daniel Penn Associates, LLC

Kate McGovern, Lean Trainer, Daniel Penn Associates, LLC

This workshop will guide you through the five step-road map that weaves Lean into an organization's management system.

By using a systems approach, you will explore the change management challenges at each level within the organization. This road map, developed by Daniel Penn Associates, will provide you with a practical method for anyone to use at any stage of their Lean journey.

A blend of theory and practice will provide an opportunity for you to learn and understand the underlying change management necessary for organizational transformation:

- The 5-Step Road Map to a sustainable Lean journey in 18 months. A sustainable Lean journey requires more than just the use of tools.
(While it's optimal to start at Step 1 and work forward, most of us started at Step 2 or 3 and are now trying to figure out how to develop Step 1 -- how to get there from where we are now.)
- The optimal approach for introducing Lean to your organization: preparing managers and administrators for their role, identifying Lean champions, and introducing Lean to the entire workforce.
- Recognizing the fact that while most organizations start with Kaizen projects, there are strategies that can guide the effort into a broader context.