

# Friday, August 8<sup>th</sup> - Lean Systems Summit

The *Lean Systems Summit* highlights Keynote Speakers and 15 informational workshops 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.

## 2014 Lean System Summit – Agenda

Friday, August 8, 2014

7:15 AM – 8:00 AM	<b>Registration, Networking, Continental Breakfast</b>				
8:00 AM – 8:15 AM	<b>Welcome: Ronald N. Dupuis, Jr., IDEXX Laboratories</b>				
8:15 AM – 9:00 AM	<b>Opening Speaker: James P. Womack, LEI Founder &amp; Senior Advisor</b>				
	<i>Room</i>				
9:15 AM – 10:30 AM	<b>A1: Changing a Complex Organizational Culture: CT</b>	<b>A2: Improving Primary Care Operations: Model Practice Approach</b>	<b>A3: Kaizen Thinking Every Day – Harnessing the Power of Employee Knowledge</b>	<b>A4: Gemba Walks: How to Get More Value from Workplace Visits</b>	<b>A5: Reporting for the Corrective Action/Prevention Action Process</b>
10:30 AM – 10:45 AM	<b>Break – <i>Change Workshops</i></b>				
10:45 AM – 12:00 PM	<b>B1: Three Keys to Boost Your Lean Transformation Journey - WA</b>	<b>B2: Conflict is the Root of All Waste</b>	<b>B3: Variability Reduction through Standardized Work</b>	<b>B4: Safety through the Eyes of Lean: Collaboration at its Best!</b>	<b>B5: Hostages - A Day in the Life of a VSM</b>
Noon – 1:00 PM	<b>Lunch (provided)</b>				
1:00 PM – 2:00 PM	<b>Roundtables</b>				
2:00 PM – 2:15 PM	<b>Break – <i>Transition to Workshops</i></b>				
2:15 PM – 3:30 PM	<b>C1: Complexities in Mapping: A Unique Perspective from NH</b>	<b>C2: Winning Staff Engagement &amp; Teambuilding: MaineHealth</b>	<b>C3: Enhancing Operational Excellence – Closing Gaps</b>	<b>C4: Keys to Sustaining: Going to See &amp; Leader Standard Work</b>	<b>C5: The Perfect Opportunity to Integrate Lean &amp; ISO -- ISO 2001:2015</b>
3:30 PM – 3:45 PM	<b>Break, Refreshments</b>				
3:45 PM – 4:45 PM	<b>Closing Speaker: Jim Womack – Observations &amp; Learnings</b>				
4:45 PM – 5:00 PM	<b>Wrap-Up — Next Steps</b>				

**9:15 AM – 10:30 AM**

**A1: Changing a Complex Organizational Culture: Process Improvement in Connecticut**

Alison Newman Fisher, Program Director of LeanCT, CT Office of Policy and Management  
Steve Dombrowski, Director, Employee & Organizational Development, Center for Lean Gov't.,  
CT Department of Labor

This workshop will provide an overview of the progress being made in the State of Connecticut, in developing a Lean culture, addressing the challenges and opportunities inherent in a complex, far-reaching organization. We will describe its Lean implementation, including the **LeanCT** program, which began coordinating the state's process improvement activities in November 2013. We will also highlight results from several state agencies, spanning all areas of government.

This session will describe –

- the **LeanCT** program,
- the steps taken by Connecticut to start this program, including a Statewide Steering Committee with 14 state agency members and over 40 state agency Lean Coordinators, and
- results from several state agencies, spanning all areas of government (health, correction, public safety, human services, regulation, permitting, environment, transportation, economic development and education).

We will discuss CT's Lean journey with a focus on the collaboration between Executive Branch state agencies. CT's state agencies recently began sharing resources and best practices to ensure sustainability for their agency's internal culture change efforts, as well as the statewide efforts that are underway.

Participants will learn of various results of the state agencies, highlighting improvements in a cross-section of CT's areas of operation, with discussion including –

- how CT got started,
- how the collaboration between agencies has changed the outcomes we've experienced, and
- how we might improve upon our efforts going forward.

**A2: Improving Primary Care Operations: Model Practice Approach**

Terry Baldwin, Director of Operational Excellence, Martins Point Healthcare  
Lynn Roberts, Practice Administrator, Martin's Point Health Care

Martin's Point is a non-profit health organization, unique in that it provides both health care services and health insurance plans. Understanding both the clinical side of health care as well as the health plan administrative side gives it the insight needed to make meaningful improvements to the health care system.

As a multi-practice primary care organization, Martin's Point Healthcare was challenged to make fundamental shifts in how daily work is carried out in our practices. In late 2011, Martins Point Healthcare embarked on a journey to create its "Martins Point Management System", built on a foundation of Lean healthcare principles and methodology. MPMS is designed to create internal focus and discipline and financial sustainability in support of its vision of healthcare transformation.

In 2013, it decided to launch a targeted effort to dive deep and fundamentally transform one practice before planning and spreading lessons to others.

This approach enables us to gain a deep understanding of the work and culture and the impacts on our patient and employee experience. By completely immersing the staff, providers and leadership alike in touching nearly all aspects of the practice we moved past the surface to gain an understanding of the systems, process and tools needed to create a culture of continuous improvement.

In this session we will describe our Model Practice Initiative and lessons learned: from site selection and readiness to engaging in the work and finally preparing for spread. Special focus will be given to the experience from the perspective of the practice staff and providers.

As a Participant, you will understand:

- advantages/disadvantages of this deep-dive “model line” approach in a team-based environment;
- issues related to pace-of-change in culture transformation work;
- integrating both targeted kaizen efforts and foundation building (system development) into the work; and
- considerations for spreading across practices.

### **A3: Kaizen Thinking Every Day: Learn How to Harness the Power of Your Employee’s Knowledge**

Deborah Morton, Business Process Specialist, Life Sciences, Corning Incorporated

The Corning Kennebunk Plant implemented an employee idea system seven years ago and has seen an increasing impact on efficiencies, cost avoidance, and cost reduction.

Corning, one of the world’s leading innovators in materials science, has applied its expertise in specialty glass, ceramics, and optical physics for over 160 years to develop products that transform people’s lives.

Today, Corning’s products enable diverse industries such as consumer electronics, telecommunications, transportation, and life sciences. Its Life Sciences offers a comprehensive range of innovative, high-quality tools and solutions for life science research and bioproduction that compress costs and timelines, improve productivity, and enable the development of breakthrough pharmaceutical discoveries.

Corning collaborates closely with customers and applies its unique combination of material and process expertise to solve complex technology challenges.

Please join us for this workshop, which highlights the value of engaging all employees in continual improvement. The content of the workshop is equally applicable for manufacturing and non-manufacturing environments:

- You should be able to return to work with new insights to help you involve employees in continual improvement.
- Learn the program elements you need to have in place to be successful and for the program to be sustainable.
- Learn how to use Kaizen to make your business complexities easier to manage.

### **A4: Gemba Walks: How to Get More Value from your Workplace Visits**

Pat Wardwell, COO, Lean Gold Certified, Shingo Prize Examiner, AME Excellence Award Assessor, Greater Boston Manufacturing Partnership

This multi-media presentation will provide tips and techniques on how to conduct a more effective gemba walk. It will cover the purpose and basics of gemba walks, and then, through the use of a fun video, will show “do’s and don’ts” when engaging with people in the workplace.

The Lean concept of “Go See, Ask Why, and Show Respect” is a critical part of continuous improvement activities, especially for those in a leadership role.

Gemba Walks are a key way for leaders to embody this concept but must be conducted properly to receive the most benefit. Without tacit knowledge of the situation and a clear understanding of the problem and the issues workers face in trying to flow value, it will be difficult for leaders to truly support improvement efforts or create the environment where all employees feel mentally and physically safe to make improvements.

Participants should go away with a better understanding of the purpose of Gemba Walks, as well as specific knowledge of how to conduct a more effective walk when they return to their own companies.

## **A5: Reporting for the Corrective Action/Prevention Action (CAPA) Process**

Michael Hooker, Sr. Quality Assurance Specialist, IDEXX Laboratories, Inc.

IDEXX Laboratories is proud of its accomplishment in its quality and operational excellence manufacturing and service work and has learned a great deal in these efforts. Its Corrective Action/Preventive Action Process reflects this.

Part of the Continuous Improvement process of any ISO-Certified facility is to maintain and manage an effective Corrective Action/Preventive Action Process. The process of developing a Corrective Action can be cumbersome, lengthy, confusing and be viewed as a non-value-added activity.

After many failed attempts to improve cycle time to document and complete CAPA activities, we applied Lean learnings to establish an A3 format approach. A3’s are great tools to capture Corrective Action activity and present in a format that is brief in length but effective in its communication. The A3 is an adaptable, repeatable, and scalable format that combines various functions into an integrated system to respond to issues and drive improvement, as well as support True North metrics and activities.

IDEXX has migrated over from a Corrective Action activity that is 8-10 pages long to a 1-Page A3 format that has shown to be effective in its ability to help manage the action items. When posted, it is an effective tool to provide visibility on the specific problem and even more effective when discussed at a daily Gemba or Waste-walk.

This discussion will describe the process of CAPA A3 development and how it was rolled out to Operations at IDEXX Laboratories.

This is an opportunity to create a standard of work for problem-solving that can be used to manage corrective action, drive process improvement, and effectively manage programs and processes.

You will learn about –

- the history of the challenge,
- the work to identify the cause of the frustration
- how the A3 created a platform for improving CAPA cycle times,
- the management of the CAPA program, and
- the communication to management of the health of the program and any constraints that they can help with to support the program.

As well as, of course, about the many Lessons Learned.

**10:45 AM – 12:00 Noon**

### **B1: Three Key Strategies to Boost Your Lean Transformation Journey**

Hollie Jensen, Results Washington, Office of the Governor, State of Washington

Washington state government has long been a national leader in adapting proven private-sector methods and tools to measure and improve state government performance. Since 2005, initiatives such as the Government Management Accountability and Performance (GMAP) program and lean process improvement tools and management systems have been used to improve individual state agency performance. Over the past two years, through the Lean Expert Partnership Program with the cooperation of the healthcare and business sectors, Washington state government has received over 2,200 hours of no-cost advice, training, coaching, and tours (gemba visits) from 149 lean experts in 58 organizations.

In September 2013, Governor Jay Inslee launched *Results Washington*, a new strategic framework that combines the best aspects of GMAP with a significantly expanded lean initiative for all state agencies. This effort includes a new lean fellowship program that assigns select leaders to work side-by-side with agencies to improve performance and focus on key state government goals.

In this session, Hollie Jensen, enterprise lean consultant with the *Results Washington* team, will share effective strategies for --

- Establishing a lean expert partnership program.
- Creating a leadership development program.
- Fostering communities of practice.
- Involving employees in improving their work and processes by eliminating waste.

Following this session, participants will be able to:

- List three key strategies that have proven effective in the first two years of Washington State's Lean Transformation Journey;
- Describe the benefits of partnering with Lean experts outside of one's organization;
- Discuss how to get involved in your local, state, or federal government and be inspired to do so.

### **B2: Conflict Is the Root of All Waste**

Scott Gauvin, CEO, MACRESO

When companies tackle Continuous Improvement (CI), they typically do so with the physical implications of waste in mind: Inventory, space, materials, time and human capital. But an insidious waste undermines value even more significantly and pervasively: Unresolved conflict.

Lean and Six Sigma methodologies both hinge on getting to the root cause of an issue as a means of addressing performance. Generally speaking this approach reveals significant opportunities to improve productivity by way of more streamlined processes.

Sooner or later, however, the same issues Continuous Improvement initiatives were implemented to fix, crop up again. This is because the true root cause driving this operational pain isn't obvious if you're not looking. It doesn't surface in a value stream map or come up in a 5 Why exercise. That is because behavior isn't typically assessed as a part of these.

To successfully implement Lean and manage the emotional “muda” that bottlenecks progress, individuals must learn to identify and better address the conflict that drives waste in the first place. They must also understand internal structural and personal relationship within the organization. Why? Behavior, not just process, is to blame for loss of productivity.

This session will describe the common symptoms of unresolved conflict and the relationship between an organization’s structures, activities and prevailing behaviors and attitudes (SABA) as key to unlocking performance potential.

Participants will learn:

- What makes up an organization’s structures, activities, behaviors and attitudes.
- How culture and performance are related.
- How employee engagement drives a Continuous Improvement culture.
- Getting to the real root of your performance pain.
- Why change can sometimes drive conflict.
- Understanding your role in conflict.
- How to get CI to stick.

### **B3: Variability Reduction through Standardized Work**

Deborah Morton, Business Process Specialist, Life Sciences, Corning Incorporated

Have you ever seen so much difference in output between operators that you didn’t know what to fix? Have you implemented changes that should help, but resulted in no improvement? Have you ever tried to automate a process where there was no “right way”?

Think about how much you could accomplish if you could detect process changes you could never see before. Think about how much you could reduce your inventory levels if you could accurately predict your throughput AND your select rate.

Join us for this workshop, which highlights the value of standardized work to reduce process variation.

This hands-on workshop is equally applicable for manufacturing and non-manufacturing environments. You should be able to return to work with new tools to help you educate other employees on the value of standardized work and visual work instructions. The activities and workshop require no special equipment or materials, are easily transferable, and can be modified to meet your particular situation.

### **B4: Safety through the Eyes of Lean: Collaboration at its Best !**

Jeremy Pare, LP.D., Senior Safety Specialist, Lonza Rockland

The opportunity this workshop presents revolves around the potential for public and private sectors of all types to look to Lean to improve their safety operations during all improvement opportunities. Safety should not be a priority that comes and goes within an organization, but a value to be sustained, and Lean efforts can be the impetus for this sustainability.

This workshop focuses on Safety through the eyes of Lean to describe ways of sustaining your safety program. Specific topics include use of 5S, Gemba walks, BBS, Kaizen events, Hoshin boards, A3 problem-solving, EPS, leading indicators, and four square presentations to sustain and improve collaboration around safety.

Collaboration is the key term here as this one element can truly have a great impact on conditions and behaviours present at your site.

You can expect to learn about -- 1) lessons learned from past experience that can be used for immediate improvements and sustainability, 2) safety in operational excellence activities, and 3) resource for future questions in the safety and environmental arena.

## **B5: Hostages: A Day in the Life of a VSM**

Jim DeMint, Lean Manager, Goodwill Industries of Northern New England

Marcel Gagne, Business Representative, Goodwill Industries of New England

Glenda Wilson, Director: Developmental Disabilities Programs, Goodwill Industries of Northern New England

What are tactics to convert hostages to advocates at Lean events?

Lean results and direction must be sustained. That sustainability is achieved through team buy-in. Often, there can be someone who is not on board or resisting change (hostage). We will share ideas on how to convert that hostage to an advocate for the desired change and how to positively influence others.

We will also share how VSM works at Goodwill in various department settings, walking through a VSM event at Goodwill. We will look at processes that are not necessarily manufacturing-driven but that may support manufacturing, such as HR hiring, consistency in multiple offices doing same or similar functions such as -purchase order use, etc.

Participants will have the opportunity to gain take-aways on how to work with those resistant to change so they can get onboard and be a positive catalyst for the process improvement. We will demonstrate how VSM has evolved from the structured process to be impactful in any work environment, keying in on results and discovery and use in an office environment. We will conduct an interactive skit for the hostage presentation. It will be light and should create “ah-ha” moments for the attendees.

## **2:15 PM – 3:30 PM**

### **C1: Complexities in Mapping: A Unique Perspective from New Hampshire**

Robert Minicucci, Special Projects Manager, NH Department of Environmental Services

Michael Moranti, Associate Professor, NH Bureau of Education and Training

Heather Barto, Emergency Preparedness Surveillance Program Manager, NH DHHS, Division of Public Health Services

Denise Krol, Health Alert Network Coordinator, NH DHHS, Division of Public Health Services

How do cultural differences affect Lean projects?

Three case studies (the good, bad, and ugly) from New Hampshire state agencies will illustrate how cultural differences across swim lanes can affect Lean projects. This workshop offers a unique perspective from State government for Lean facilitators in any complex organization – for, as Lean practitioners know, some of the best practices and lessons learned can be applied anywhere.

The three case studies involve both federal and state agencies and include the Department of Transportation, Department of Environmental Services, Department of Public Health, Department of Safety, Bureau of Public Works, Adjutant General’s office, and National Guard Bureau.

The learnings from these actual Lean events within government will provide participants with objective information from the three case studies, the lessons learned, and the tools that were developed from these experiences.

## **C2: Winning Staff Engagement and Teambuilding: Leveraging Lean Continuous Improvement for Operational Excellence While Merging Hospitals.**

Patricia M. Camire, VP Clinical Services, Southern Maine Health Care  
Miriam Leonard, VP Value Improvement, MaineHealth  
Suneela Nayak, MS, RN, Clinical Quality Specialist, MaineHealth

Unprecedented national change and increasing economic pressures often require hospitals to merge services for cost containment while preserving quality and access. Challenges commonly seen during mergers (staff unrest, untested workflows, non-aligned EMRs, etc.) can result in harm events, gaps in patient care, losses in staff engagement, and overall disruption to services. These can result in real and costly challenges to safe patient care, key quality measures and at risk revenue.

Healthcare mergers are widely recognized to be challenging for both patient safety and staff engagement. As plans to merge two hospitals developed, it became clear that consolidating selected clinical services would add value and reduce cost for our customers: patients and families (the community as well as large and small business owners and employers).

These goals, along with the critical objectives of winning staff engagement and building team relationships across merging organizations led to opportunity for the application of Lean principles and tools.

While optimizing patient safety, our patient-centered process concurrently engaged staff, strengthened inter-professional relationships and partnerships in care across our merging organizations.

The complex merger strategy and implementation required service consolidation while providing seamless and safe care for patients, strategic involvement of inter-professional groups of staff and key leaders from both settings, and engaging frontline and leadership expertise.

We will share key learnings, perspectives from senior leaders, front line staff and most importantly, patients, along with strong data/findings and future sustainment improvements.

## **C3: Enhancing Operational Excellence – Closing Gaps**

Elizabeth Rebeil, MBA, MBB, Associate Director OE – Sr. OE Coach, Shire Pharmaceuticals

We live in a challenging – competitive business world. Customers require more, and companies' operating costs and regulation constraints make it more critical to retain and attract customers. The interaction among customers, companies, and regulated agencies requires new ways of thinking and solving problems. The only way to survive in today's challenging-competitive business world is by enhancing operational excellence in their process.

However where should we start? Which process should we enhance first? Where are our gaps?

Participants will identify the gap between the Operational Excellence Current State and Business priorities to determine tactical areas to be enhanced.

The workshop will analyze the cycle of OE from Planning to running the Business and how to link projects and improvements to the company priorities. It will address the criticality of OE in any Organization. You will see the advantages of assessing and enhancing Operational Excellence as a

Process (IPO). By enhancing Operational Excellence as a Process (IPO 'Input-Process-Out') and closing gaps, you will lead the Business to great results and the biggest impact for your improvements. The business will deliver great results such as top-line growth, bottom line growth, cultural change, and customer & employee satisfaction.

#### **C4: Keys to Sustaining: Going to See & Leader Standard Work**

Robert Burke, COO & Executive Director, Value Innovation Partners, Ltd.

Leader Standard Work (LSW) is a key to Lean sustainment. The elements of LSW include gemba walks and visual management. Leaders need to go see, show respect, and ask questions as they help themselves and others gather facts and practice continuous improvement.

As simple as this might sound, it does take deliberate practice. There must be a purpose to a gemba walk, and it's an activity that's best practiced as a small team sport.

This workshop will focus on the Elements of Leader Standard Work:

- Visual Management
- Daily Accountability
- The Gemba Walk

You will --

- Learn the elements of Leader Standard Work and how it is a key to sustaining Lean.
- See examples of visual management which can make it much easier for leaders to do what is expected of them.
- Learn the intent of gemba walks and have an opportunity to practice one's observation and coaching skills.
- View a visually managed inventory process and pull systems that support flow.
- Employee-driven Continuous Improvement Suggestion Program.

#### **C5: The Perfect Opportunity to Integrate Lean and ISO: ISO 9001:2015**

***Learn about ISO 2015 and how Lean-ISO Integration is the STANDARD to Support a Culture of Sustaining Gains.***

Frederick Shamburg, President, Leanovations

Kimberly Cunningham, Vice-President Lean-ISO Integration, Leanovations

The International Organization for Standardization (ISO 9001-2008) introduced a revised Quality Management standard with an emphasis on measuring customer satisfaction and compatibility with ISO 14001 - Environmental Management Systems.

This workshop is an opportunity to learn about the changes, how to Integrate Lean-ISO together, how to implement them successfully, and how your organization can prepare for a successful ISO 9001:2015 transition.

Based on the draft version of ISO 9001:2015 -- a revision to ISO 9001 -- the new standard will contain many major changes. This new standard will be much less prescriptive and references several Lean management principles and tools, creating a need to "Integrate" Lean-ISO by merging Lean practices into the QMS/ISO Procedures.

Too often in organizations it appears that the Lean and ISO efforts are at best not connected and at worst bring conflict and complexity into an organization. It is wasteful to have two different systems,

driven by two different departments, in the same organization attempting to drive toward the same objectives, while not being properly integrated.

So what is Lean-ISO? Lean-ISO integration means an organization becomes efficient and effective by managing its way of doing things through systemizing its processes. Following a Lean-ISO process ensures that nothing important is left out and that everyone is clear about who is responsible for doing what, when, how, why and where.

To implement a "Lean-ISO" culture of pursuing continual improvement, an organization must focus on creating a "Profitable Growth Strategy". Through Lean-ISO Team events, implementing Lean and establishing standard work, where you can predict the outcome in time, quality and cost is the foundation which supports a systemized Lean-ISO process.

Lean-ISO is all about meeting what the customer values in quality requirements and applicable regulatory requirements to enhance customer satisfaction, in the most efficient and cost effective manner to enjoy profitable growth.

Participants will learn about the many Key Changes to ISO 9001:2015 and their implications and opportunities.