

# OPEX Week Spring Live Incorporating Chief Transformation Officer & Transformation Leaders Executive Club 24<sup>th</sup> – 27<sup>th</sup> May, 2021 (EST Time Zone)

**Charting Deep Change through Digital Capabilities & New Ways of Working** 

#### **Key Theme & Mission Statement:**

As transformation leaders set out to plan for their 2021 strategy, a key theme remains to be the ongoing grapple with the pandemic crisis and the deep change it has brought to the ecosystems across all industries and sectors. We have also heard from OPEX Live Week in January from industry leaders some critical messages:

- Businesses and organizations need to prepare themselves and workforce for a new digital ready operating model and developing new digital capabilities
- Doing more with less is ever so important at the time of crisis with a redrawn timeline and portfolio
  of initiatives
- Finding new ways of working and seizing the need for speed and design for agility, adjacencies and adaptability
- Institutionalize good practices since the pandemic is critical to achieve continuous improvement
- Reimagine and reinvent new ways to deliver customer, employee and stakeholder value
   Transformation at the time of crisis calls for a new kind of leadership that embraces change and inspires new ways of working

Let's not waste a good crisis to adapt and normalise the new ways of working and thinking! In this next edition of OPEX Week Spring event, we will bring even more thought-leaders who are dedicated to driving successful transformations in these key areas to provide practical takeaways for the community attendees.

### **Event Format: A Unique Experience**

OPEX Week Spring Live is an innovative summit provides a variety of learning, networking and immersive deep exchange experiences, incorporating a dedicated Chief Transformation Officer & Transformation Leaders Executive Club. The main event will span over four days with the key activities for senior leaders and their teams to participate:

### Day One (24th May):

• Interactive Workshops: For those who are interested in joining a small group learning and discussion dedicated to these specific topics and areas. Open to registration on the first come first served bases. Limited to 25 participants to ensure interactivity and immersive learning.

### Day Two & Three (25th - 26th May)

 Keynote sessions featuring an all-star cast of transformation and OPEX leaders to share insights on key trends, new reality and the future state of the industry. Open to registration from the entire community.

### Day Four (27th May):

Chief Transformation Officer & Transformation Leaders Executive Club is an invitation only
exclusive summit for 50+ top-level transformation decision makers to go through a series of case
study presentations, think tank discussions, dedicated networking and panel discussions. <u>Limited to
50 qualified and profiled senior leaders</u>. The leaders participating the Executive Exchange Modules
will also take part in the Pre-event 121 meetings with selected event partners and innovative
solution providers.

#### **Agenda Overview**

Pre-event	Monday 24th	Tuesday 25 <sup>th</sup>	Wednesday 26 <sup>th</sup>	Thursday 27 <sup>th</sup> May, 2021
(May)	May, 2021	May, 2021	May, 2021	
1-2-1 Meetings	Interactive	Keynote	Keynote	Chief Transformation Officer &
	Workshops	Sessions	Sessions	Transformation Leaders Executive
				Club
				(Invitation Only)

### **Hear from Chief Transformation Officers, OPEX & Transformation Leaders Include:**

Paul Krebs, Chief Information Officer & Chief Transformation Officer, Koch Industries

Jasmine Ahmed, Senior Vice President, Global Finance Transformation, News Corp

Amir Farid, Chief Operating Officer & Chief Business Transformation Officer, Westfield Insurance

Bhavana Bartholf, Bhavana Bartholf, Chief Digital Officer, Microsoft WW Solutions

Moiz Neemuchwala, Chief Transformation Officer, Rite-Hite

Renata Ribeiro, Senior Vice President, Carnival Corporation

Alexander Breskvar, Corporate VP Quality Management, Siemens Gamesa

Lee Butcher, Head of Quality Management, Offshore, Siemens Gamesa

David Hadd, Senior Director Office of Intelligent Automation, Cigna

Kevin Wojcikewych, Vice President, Business Excellence, CALYX

Kelli Pierce, SVP Operational Excellence, Mastercard

Emilie Ly, Senior Director, Business Process Management and Intelligent Automation, VMware

Hemant Purkar, Executive Director, Digital Workforce COE, JP Morgan Chase

John Baranzelli, Deputy Director, Office of RAPID Results, Illinois Department of Central Management Services

Angel Garcia, Executive Director, Customer Operations, AbbVie

Ewerton Pavan, Senior Director of Business Transformation and Continuous Improvement, Philips

Jose Teixeira, Director of Process Management and Center of Excellence, Ericsson

Ryan Kerekes, Vice President, Process Excellence, GM Financial

Gonzalo Parga, SVP Business Process Engineering, BBVA USA

Danica Natoli, Strategic Business Integration & Continuous Improvement, Whole Foods

Justin DiPasquale, Director, Shared Services, Paychex

Jon Armstrong, Founding Partner, Changeway

Joseph Peri, Chief Automation Officer, Change Healthcare

Jessica Nordlander, Chief Operating Officer, ThoughtExchange

### Monday 24<sup>th</sup> May, 2021: LIVE INTERACTIVE SESSIONS

	LIVE INTERACTIVE ROUNDTABLES
8:00 -	4 Executive Boardroom-Style Group Discussions: OPEX Executive Think Tank Series 2021
10:00	Understand, Redesign, Improve, Strategy Annual Meeting – Four sessions, Four unique experiences
EST	The PEX Network, in collaboration with Veolia and Cristian Matei, Ph.D, LSS MBB, President of Advanced
	Thinking, is delighted to invite its members to join a series of very private virtual gathering with other senior
	OPEX and Business Transformation Executives. The OPEX Executive Club will be an opportunity for senior leaders
	to discuss real challenges as well as learning and benefit from Veolia's award-winning Business Transformation
	case study and Cristian's unique perspectives. Each meeting will become a space for leaders to experiment and
	for experts to get inspired. Session Dates below:
	Session 1: Monday May 24 <sup>th</sup> -14.00 -16.00 CET/8.00am-10.00am EST (In collaboration with OPEX Spring): "UNDERSTAND" - Transforming business DNA towards the new reality: Starting by dissecting Key leadership challenges
	Session 2: Monday August 23 <sup>rd</sup> - 14.00 -16.00 CET/8.00am-10.00am EST (In collaboration with OPEX Summer): "REDESIGN" - How to practically address these challenges? The verified integrated redesign of our Organizations – including Veolia case study that won the OPEX Process Excellence Award for the Best
	Transformation Session 3: Monday September 27 <sup>th</sup> - 14.00 -16.00 CET/8.00am-10.00am EST (In collaboration with OPEX Europe)
	"IMPROVE" - How to sustain the gains? A different way to implement successful Continuous - type Programs – Including Veolia case study
	Session 4: Monday November 15 <sup>th</sup> - 14.00 -16.00 CET/8.00am-10.00am EST
	"STRATEGY" Annual Meeting: 2022 and beyond
	Session 1 – "Understand" - Transforming business DNA towards the new reality: Starting by dissecting Key leadership challenges
	Transforming business DNA towards the new reality: Starting by dissecting Key leadership challenges
	Setting up and carrying out an enterprise business transformation program to achieve significant growth and turnaround results is far from an easy task. It is even more difficult to sustain the results afterword and to
	embed the Continuous Improvement capability within the new created framework. Cristian has done it many
	times delivering millions in business value. In this transformation leader's series discussions, Cristian will lead us
	on a ground-breaking journey of understanding the key challenges, re-engineering enterprise business process, and sustaining continuous improvement. Join the first discussion to gain a deep understanding of the following
	<ul> <li>key questions:</li> <li>Why it is so difficult to REALLY get rid of fragments-based management? An Organizational Assessment across 25 years from all continents, diverse industries</li> </ul>
	Why wave after wave of "flavors of the day"- type improvement programs failed? The REALITY check of improvement methodologies, largely developed from the same fragmented perspectives
	• Why wave after wave of new technologies implementation have never really solved the organizations' fundamental problems, leaving the Organizations basically unchanged? Let's discuss the digitalization trap.
	Cristian Matei, Ph.D, LSS MBB, Founder, Advanced Thinking Irina Munteanu, Chief Financial Officer Veolia Romania Deputy General Manager, Apa Nova
	VEOLIA ADVANCED THINKING
LO:00-	Interactive Roundtable: Improving Your ROI of Customer-Facing Digital Processes
1:30	For Senior Process Excellence Leaders From the Insurance Sector
	This group conversation will focus on how to better engage with customers through digital journeys and ensure
	the implementation process is the most agile and efficient possible. Our moderators will share how to digitize

and streamline manual customer-facing processes and improve ROI of customer-facing digital processes. During the session, we will cover:

- How to deploy a digital journey in a matter of days
- How much you could save by removing the friction associated with manual processes from your enterprise operations
- How to improve customer experience and drive revenue growth with a self-service, no-code platform With the leading expertise of our session moderators, Omer Shirazi and Alex Karavousanos, this session will allow you to learn about digital transformation strategies and best practices in the insurance industry and discover digital solutions for your organization in 2021.

Omer Shirazi, Co-Founder, COO, EasySend

Alex Karavousanos, Head of Business Development, EasySend



11:00

Break

### Tuesday 25th May, 2021: LIVE INTERACTIVE SESSIONS

Tuesday 25" May, 2021: LIVE INTERACTIVE SESSIONS		
	LIVE INTERACTIVE ROUNDTABLES	
10:00-	Redefining The Future of Work by 2025 Implications for Shared Services and GBS Leaders	
11:30	As covered by the World Economic Forum, the discussion will focus on four things that will redefine the way we	
	work by 2025 and the specific implications for shared and global business services:	
	"Remotopia" work from home – from the margins to the mainstream	
	Blue collar. White collar. Green collar?	
	The gig economy evolution	
	Automation and AI augment the workforce	
	re-source and Enate are delighted to provide Shared Services and GBS Leaders with a unique platform to learn and share best practice on the themes that are disrupting the way business services are delivered. This live virtual industry roundtable has been designed specifically for senior leaders looking at improving their organisation's performance as the world of work continues to be disrupted and transformed.  Barry Matthews, Founder & Managing Director, re-source  Martin Boakes, EU Managing Director, Enate	

### Tuesday 25<sup>th</sup> May, 2021: KEYNOTE SESSIONS

Keynote Case Study: Digital transformation accelerated for business impact: Connecting customer,
employee and new ways of working through automation, machine learning and an agile mindset
At Ericsson, 85% of the company are working remotely, requiring more robust and accurate systems supporting transformation at all levels. They have also taken a hard look at the current ways of working to examine what changes are required to fit better for the new world. This case study will share practical steps they have taken in digital transformation to achieve real business impact:  • What are the key pillars in the Ericsson digital transformation?
<ul> <li>Sharing practical examples of levering technologies in driving real impact in business value: RPA, ML, Al, Data mining</li> </ul>
Redefining the roles and skillsets for people to fit the new flow: Managing behavior, competence and culture in a continuous changing environment
How to balance the pillars towards a successful Digital transformation
Jose Teixeira, Director of Process Management and Center of Excellence, Ericsson
Likhit Verma, Performance Improvement Manager, Ericsson
<b>Keynote:</b> Organizational Ambidexterity - Balancing Efficiency and Innovation

Organizational Ambidexterity represents the successful balancing of efficiency and innovation and has been linked to things like organizational learning, competitive advantage, and organizational survival. Being both efficient and innovative can be a challenge in the best of times; achieving this while adapting to massive market disruption can feel impossible. In this session, hosted by ThoughtExchange COO and Sweden's most innovative leader in 2019, Jessica Nordlander will explore this balancing act in an era of distributed leadership and increased digitalization.

Jessica Nordlander, Chief Operating Officer, ThoughtExchange

# Thought Exchange

# Beyond Online Collaboration – pushing the boundaries of innovation and continuous improvement in the new normal

Strategy deployment and collaboration requires complete new thinking in the new virtual environment to make real business impact. And what happens if we combine proven improvement methods such as the Toyota A3 thinking, the Danaher's policy deployment model and the design thinking methodology on a digital platform as your new collaboration tool? Hear from Jon Armstrong, Founding Partner of Changeway and Andrew Cogan, Head of Department Consulting at Siemens Healthineers to discover how you can re-invent business innovation, transformation and find out what the future holds for CI.

- The four post-pandemic challenges and opportunities for the CI community
- The three-horizon model for the future development of CI practice in response to these challenges and opportunities
- Examples of Intelligent Improvement
- The possibilities of Augmented Improvement and how this can be unlocked
- Q&A with Andrew Cogan learning from delivery of improvement at the NHS front line

Jon Armstrong, Founding Partner, Changeway

Andrew Cogan, Head of Healthcare Consulting, Siemens Healthineers



### 11:50 | Content Break

### 12:30 Know the Facts: Make better decisions and improve process execution through Process Intelligence

Process Intelligence provides an end-to-end view of your processes. This includes monitoring and alerting capabilities, a wide range of process metrics, and predictive analytics. Beyond that, it allows users to define process behaviors of interest to them. This frees information that was once lost in raw data. So, behaviors that were once unobservable become known and actionable. Ultimately, this enables advances in reporting, compliance, automated control, and analytics.

This session will show you how and why to use Process Intelligence in your business. We will also share use cases of how different organizations got started on their Process Intelligence journey and the benefits they've realized along the way.

Richard Rabin, Product Marketing Manager, Process Intelligence, ABBYY

## **ABBYY**

# 13:10 Panel Discussion: Drive exponential business impact through end to end digital transformation: Embrace the era of hyperautomation

Hyperautomation is set to be the future of Intelligent Automation by marring multiple AI tools with RPA to go beyond rule based tasks and automate complex business processes. This session invites the

true leaders and pioneers who are on the journey towards hyper automation to share from first-hand experience what the future looks like: Moving from Intelligent Automation to Hyperautomation: What does the journey look like and how are you preparing for it? What are the key capabilities required to move towards hyperautomation Driving end to end digital transformation through AI, Machine Learning, API Enabled Microservices How to prepare for hyperautomation? Key lessons learned Joseph Peri, Chief Automation Officer, Change Healthcare Moderator: David Hadd, Senior Director Office of Intelligent Automation, Cigna 13:50 Panel Discussion: Bolstering business transformation with effective organizational change management Exploring and sustaining a new agile way of working accelerated by the pandemic Overcoming key challenges of managing organizational change Embedding new digital ways of working into our change management framework Changing the way we change by focusing on long-term mindset and behavior changes Ryan Kerekes, Vice President, Process Excellence, GM Financial Ewerton Pavan, Senior Director of Business Transformation and Continuous Improvement, Philips

### Wednesday 26<sup>th</sup> May, 2021: KEYNOTE SESSIONS

End of Day

14:30

10:00	Inspirational Keynote: Right Makes Might: Lessons in Crisis Leadership from Abraham Lincoln The American Civil War was the single most transformative event in the history of the United States. The leader who navigated the nation through this fiery crucible was President Abraham Lincoln. The story of Abraham Lincoln is a study in leadership during times of crisis. In this thought- provoking presentation, John Baranzelli will peel away the myth of Abraham Lincoln to demonstrate
	that the greatness of his leadership lies within all of us.
	Unique challenges of leadership during times of crisis
	Leadership attributes necessary to lead transformational change
	The role of vision in building a guiding coalition for change
	John Baranzelli, Deputy Director, Office of RAPID Results, Illinois Department of Central
	Management Services
10:45	Case study: Building Operational Excellence into Critical Business Pivot to Enable Scalability This case study will share the Mastercard journey where technology, platform and operational excellence have come together to drive rapid business growth.  • Scaling business rapidly leveraging technology platforms and operational excellence • Driving Operational Excellence in product development: Overcoming the key challenges
	Orchestrating enterprise transformation to drive growth and scalability
	Kelli Pierce, SVP Operational Excellence, Mastercard
11:25	Break
11:50	Case study: Bringing together agile, lean and digital tools to transform at scale
	As the transformation toolkits continue to develop and expand, it is clear that a blended approach
	with proven methodologies and technologies are more effective in driving efficiency and business
	result. In the past few years, S&P's global operations team transformed from transactional support

	to a value-add business partner and engine modeling transformation across the company. Ekaterina
	will share the key approaches in:
	A top-down transformation approach to bring global operations from "good" to "great"
	Driving a multi-faceted transformation strategy leveraging lean, agile and automation
	<ul> <li>Developing skills for the future - using Lean Academy and RPA Academy to automate processes and drive business value</li> </ul>
	Transforming from support to partnership with 70% millennials
	Sharing key lessons learned
	Ekaterina Curry, Global Head of Operations & Business Transformation, S&P Global Ratings
12:30	Case study: Accelerate agility and improving efficiency and customer experience
	Correlate the impact of driving sustainable CX improvement with the right product strategy
	Investing in operational excellence initiatives that improve service quality
	Increase agile ways of working in non-technical functions/ teams
	Upskilling transformation focus with the right technical expertise
	Sedwin Vadukut, Enterprise Technology Transformation Leader, Experian
13:10	End of Day

### Thursday 27th May, 2021:

### **Chief Transformation Officer & Transformation Leaders Executive Club**

### (INVITATION ONLY, EST TIME ZONE)

Incorporating a Chief Transformation Officer module, the dedicated executive club brings together 50+ top-level transformation leaders in an interactive setting to discuss, debate and explore holistic transformation strategies to develop new ways of working and charter the deep change on the organisational, cultural and market levels.

In addition to benchmarking and sharing critical insights with the same calibre transformation leaders, the executive club also offers best opportunities to have 121 conversations with leading solution providers to explore how you can leverage these latest developments to supercharge your transformation and achieving business excellence.

9:30	Chief Transformation Officer: A New Imperative
9:30	Keynote Panel: Designing a Blueprint for Breakthrough Value Creation
	Defining the transformation north star vision to be a true business enabler
	What does a holistic business transformation look like from the chief transformation officer perspectives
	Defining a digital strategy to accelerate transformation
	Beyond technology: Driving meaningful change through leadership and culture development
	Paul Krebs, Chief Information Officer & Chief Transformation Officer, Koch Industries
	Jasmine Ahmed, Senior Vice President, Global Finance Transformation, News Corp

	Amir Farid, Chief Operating Officer & Chief Business Transformation Officer - Small Business, Westfield Insurance
10:15	Six key lessons to accelerate business transformation: How not to fail at scale  Many enterprise transformation programs fail at scale. This session will bring together 6 key lessons to help transformation leaders beat the odds and successfully drive their enterprise transformation forward:
	<ul> <li>Establish a culture where transformation can thrive</li> <li>A clear vision &amp; strategy and how to connect that with your transformation objectives</li> </ul>
	<ul> <li>A clear vision &amp; strategy and how to connect that with your transformation objectives</li> <li>Invest in change management: Have we done enough?</li> </ul>
	<ul> <li>Enable managers and unleash the transformation power</li> </ul>
	<ul> <li>Lead with Empathy: Sharing examples where empathy makes a huge difference</li> </ul>
	<ul> <li>Innovate with technology that drives customer and business value</li> </ul>
	Bhavana Bartholf, Global Head for Solutions Digital and Sales Strategy, Microsoft WW Solutions
10:45	Content break
10:55	A new approach to assess culture: Discover the truth from the employees' perspectives  Culture is one of the biggest pillars in business transformation yet it is never easy for leaders to get to the bottom of what employees truly think, despite of all efforts in surveys and engagement programs. This challenge has been amplified further with most of our workforces now working remotely for more than a year now. This session is looking into new methods and approaches for leaders to create an environment where the truth from the employees' perspectives are revealed. This is also aimed to be an interactive session so please come armed with your questions, challenges and suggestions.  Why are traditional culture surveys not working effectively?  What are the new ways to find out about the truth when workforce is remote and distributed?  Sharing the approach and examples that have been working at Siemens Gamesa  An open discussion: What are you working on in your organization?  Alexander Breskvar, Corporate VP Quality Management, Siemens Gamesa
	Lee Butcher, Head of Quality Management, Offshore, Siemens Gamesa
11:25	A Practical Approach: Design and Implement Business Excellence as the company DNA  OPEX leaders spend much time and efforts pitching the importance of systematic and step change.  Once you get the go head and start to execute, where do you begin? This session will share a practical approach and experiences in developing an operating model for Business excellence including:
	<ul> <li>Developing a target operating model from the group level where people, technology and process come together to strive for business excellence</li> </ul>
	Advancing functional maturity in customer-centricity, technology improvement, process and performance governance to support the Target Operating Model
	Building the roadmap for a different way of working: Sharing key challenges and best practices along the way
11:55	Kevin Wojcikewych, Vice President, Business Excellence, CALYX  Break
11.33	Digital Transformation & Navigating Deep Change
12:30	Case study: Driving next level business performance by Integrating BPM & Intelligent Automation
12.30	Case study. Driving next level business periormance by integrating Drivi & intenigent Automation

	<ul> <li>Moving from RPA to Intelligent Automation through AI, Machine Learning and Cognitive Capabilities</li> </ul>
	Driving end to end digital transformation by complimenting Intelligent Automation with BPM
	Sharing business cases and results: Embedding RPA in your BPM infrastructure to create maximized business result
	Emilie Ly, Senior Director, Business Process Management and Intelligent Automation, VMware
13:00	Case study: Re-imagine business models and processes achieve greater cost savings by strategically leveraging digital workforce technologies
	This case study will share how Chase has successfully deployed and matured their digital workforce agenda with stellar results.
	<ul> <li>Maturing digital workforce deployment through Robotics, Artificial Intelligence and cognitive solutions</li> </ul>
	Embedding digital workforce with traditional process re-engineering approach
	Re-imagine a mixed workforce of human and digital employees
	Develop capabilities through a COE approach and lessons learnt/best practices
	Hemant Purkar, Executive Director, Digital Workforce COE, JP Morgan Chase
13:30	Culture by design: Creating a powerful and sustainable continuous improvement culture
	Steven Hall, Vice President, Process Excellence Leader, Liberty Mutual Insurance
14:00	End of Executive Exchange