

AMERICA'S ONLY  
EXECUTIVE-LEVEL  
OPEX AND BUSINESS  
TRANSFORMATION  
EXCHANGE COMES  
TO TEXAS FOR THE  
FIRST TIME

## Aligning your organizational transformation with your operational excellence strategy

FOSTERING A  
COMMUNITY,  
FORGING GREAT  
RELATIONSHIPS

# OPEX Exchange

Automation Answers - Preparing And Optimizing  
Your Processes For Automation With New  
Discussions And Case Studies

For The First Time At The OPEX Exchange - Exclusive  
Workshop Lead By Nigel Thurlow, Chief Of Agile, Toyota

Pre-Conference Transformation Excellence Workshop  
Examining The Future Of Continuous Improvement  
And Business Transformation For Senior Leaders

11TH - 13TH APRIL  
THE WESTIN AUSTIN AT THE DOMAIN,  
AUSTIN, TEXAS

C-Suite Only Panel Discussion Examining Organizational  
Buy-In And Employee Engagement With Expert Insight  
From C-Level Leaders With Fortune 500 Experience

### NEW SPEAKERS FOR 2018 INCLUDE



**KEN GOLDMAN**  
Former Global CFO



**DR CHARLES BRANDON**  
Director Process Improvement  
Program Office



**MOLLIE BELL**  
Chief Engagement  
Officer



**AUBREY JONES**  
Senior Director Global  
Continuous Improvement



**JAMES WEBB**  
Chief Operating  
Officer



**NIGEL THURLOW**  
Chief of Agile

**YAHOO!**



MANY MORE LEADING INDUSTRY FIGURES INSIDE...

## AGENDA CREATED WITH INPUT FROM OUR 2018 OPEX EXCHANGE EXPERT ADVISORY BOARD

At the OPEX Exchange we endeavor to create a compelling, impactful agenda for two days to deliver you real tangible take-aways that will result in improved operational efficiencies and process improvement. In our journey to achieve this, we've researched with senior Operational Excellence and Business Transformation executives stretching the depths and breadth of the space.

Every member of our advisory board has been carefully selected for their expertise, experience and knowledge to ensure that the OPEX Exchange is receiving well-rounded advice and delivering you a valuable program for the event. The Advisory Board assist us in researching and developing relevant, timely and thought leading content for the community, as well as guiding us on market trends, industry leaders, high quality contributors and speakers and agenda content for our upcoming 2018 series of events.



**CARL LOBUE JR**  
Partner  
LoBue Group



**GREGORY NORTH**  
Founder & President  
Globe North



**AARON STYLES**  
VP Operational Excellence  
thyssenkrupp Elevator Manufacturing



**CLINT WESTBROOK**  
VP Global Operational Excellence  
Aramark



**JOSEPH TOOMER**  
Director Enterprise Process Excellence  
USAA



**ABOUBACAR CISSOKHO**  
Head of Lean Center of Excellence  
Discover Financial



**DONALD KUK**  
Former VP Global Business Transformation  
AIG



**VIJAY PANDIARAJAN**  
Program Director, Product Management  
IBM Digital Process Automation



**Ken Goldman**  
Former  
Global CFO



**Dr Charles Brandon**  
Director Process Improvement  
Program Office



**Nat Ganesh**  
Director Process  
Excellence & Innovation

**Stephen Sledge**  
Continuous Improvement  
Director



**Nigel Thurlow**  
Chief of Agile



**Donald Kuk**  
Former VP Global Business  
Transformation



**James Webb**  
Chief Operating  
Officer



**Aubrey Jones**  
Senior Director Global  
Continuous Improvement



**Mollie Bell**  
Chief Transformation  
& Engagement Officer



**Leslie Pemberton**  
VP Global  
Quality



**Bilal Muhammad**  
VP Product & Solution  
Engineering and Implementation



**Paige Buechley**  
Director, Process  
Improvement and Change



**Kevin Kellow**  
Director Process  
Improvement



**Joseph Toomer**  
Director Enterprise  
Process Excellence



**Aboubacar Cissokho**  
Head of Lean  
Center of Excellence



**Doug Drolett**  
Continuous Improvement  
Leader Americas



**David Hadd**  
SVP Continuous  
Improvement



**Matthew Gill**  
Director Operations  
Excellence



**Cheryl Tulkoff**  
Director Corporate Quality &  
Continuous Improvement



**Stephen Indelicato**  
Director Operational  
Excellence, Global Quality



**Florencia Salvio**  
Director Process  
Excellence - LATAM



**Gregory North**  
Founder &  
President



**Veradej Thongintra**  
VP Head of Corporate Strategy  
& Digital Transformation



REGISTRATION AND WELCOME COFFEE

4.00PM

OPENING REMARKS FROM THE HOST

4.30PM

TRANSFORMATION EXCELLENCE:

4.40PM

TRANSFORMING YOUR ORGANIZATION THROUGH A CULTURE OF OPERATIONAL EXCELLENCE AND CONTINUOUS IMPROVEMENT

- Creating an organizational structure that enables transformation and continuous improvement across the business
  - How can you build a compelling case with your leadership team to drive improvement?
  - Alignment of single metrics to foster collaboration and cross-functional processes to measure company performance
- Operational excellence programs to advance the digital transformation
  - Aligning your technology and strategy to deliver disruptive innovation
  - Integrating processes and technology to enable your company to be more reactive to your customers
  - Examining high impact processes and support tools that enable the digital enterprise
- The best practices you can take for impactful RPA adoption
  - The early benefits your finance department will gain through RPA integration
  - Real examples and challenges of implementation
  - The future of RPA and the direction that cognitive AI will develop
- Change Management as a culture of Continuous Improvement
  - Setting the standards for work and delivering them across the organization
  - Implementing a comprehensive framework to shape and measure culture change
  - Quantify and visualize your results with heat maps, cultural parameters, employee engagement surveys and improved finances

Session available for sponsorship: For more information on how to get involved please contact our commercial team at [exchangeinfo@iqpc.com](mailto:exchangeinfo@iqpc.com)

OPENING REMARKS FROM THE HOST

6.40PM

PRE-EVENT NETWORKING RECEPTION

7.00PM

## REGISTRATION AND COFFEE

07.30

## OPENING REMARKS FROM THE CHAIR

08.30

Gregory North, Founder & President, Globe North

## OPENING OPEX EXCHANGE KEYNOTE:

### TRANSFORMING YOUR FINANCE OPERATIONS AND EXPENSE STRUCTURE TO IMPROVE YOUR COMPANY CORE

08.40



- Thinking operationally and effectively working to cut costs and improve oversight of your core finance operations
- Implementing a culture of operational efficiency across the organizational expense structure
- Improving communication across the organization and setting key goals and KPIs to ensure accountability
- Mapping accounting and transactional functions to measure their competitiveness and effectiveness across operations
- Reinvesting savings in appropriate areas to foster innovation and aid company growth

Ken Goldman, Former Global CFO, Yahoo!

## DRIVING CUSTOMER-CENTRIC OPERATIONS WITH DIGITAL PROCESS AUTOMATION

09.10

Business depends on continual innovation. But, too often, repetitive tasks and inflexible processes hamper the flow of great ideas, hinder productivity and make it hard to create and sustain great customer experience. We will share our approach on how to build a digital process automation strategy that combines Business Process Management and Decision Management capabilities with the flexibility of the cloud and the intelligence of cognitive to improve customer-centricity, speed response time, reduce errors and lower costs.

Session led by IBM

## ONE-TO-ONE BUSINESS MEETINGS & NETWORKING

### THINK TANK ONE

09.45

### RATIONALIZING YOUR PROCESSES BEFORE YOU AUTOMATE

## ONE-TO-ONE BUSINESS MEETINGS & NETWORKING

10.20

## ONE-TO-ONE BUSINESS MEETINGS & NETWORKING

### THINK TANK TWO

10.55

### OPERATIONAL EXCELLENCE AND CHANGE MANAGEMENT

## DRIVING TECHNOLOGY INNOVATION AND CHANGE TO REINVENT YOUR ORGANIZATION AND SUPPORT GROWTH

11.00

- Discussing how innovation and continuous improvement methodologies can be utilized through your entire organization to influence change
- Addressing your IT strategy from a business perspective and examining how best to maintain efficiencies
- Exploring how you can implement technology whilst adhering to compliance and regulation
- Investigating how OPEX can support and create business growth in an era of technology disruption
- Examining the demands of your new IT model and how you can best manage this at an enterprise level
- Triaging your processes before IT begins to ensure reduced wastage and a culture of process-first

**Bilal Muhammad, VP Product & Solution Engineering and Implementation, Wells Fargo**

## DELIVERING INTELLIGENT AUTOMATION TECHNOLOGY FOR YOUR BUSINESS & IT PROCESSES TO DELIVER AN IMMEDIATE IMPACT TO YOUR ENTERPRISE - TOPIC TBC

11.30

- Finding the business case for robotic process automation within your organization and assessing how you can prepare yourself for implementation of RPA
- Creating software robots to automate any process end-to-end and advancing your automation with cognitive bots that learn as they work
- Examining how analytics and automation can provide insights to better measure effectiveness and set scales for your operational excellence
- Optimizing employee productivity and better utilising your human resource through process automation
- Realizing immediate cost savings and new efficiencies instantly and bolstering your Operational Excellence strategy through process automation

**Session Lead By Automation Anywhere**

## ONE-TO-ONE BUSINESS MEETINGS & NETWORKING

### THINK TANK THREE

12.05

#### CREATING A CONSISTENT MIND-SET OF OPERATIONAL EXCELLENCE THAT IS SCALABLE ACROSS DIFFERENT COUNTRIES AND CULTURES

- Evolving your process improvement programs to develop a mind-set of problem solving that can be repeated and scaled across regions
- Moving away from traditional six sigma and identifying new best practice for performance improvement
- Aligning business excellence and transformation to develop skills and culture that contributes to performance improvement
- Understanding that different environments have different requirements and finding something consistent that works for all

**Florencia Salvio, Director Process Excellence – LATAM, American Tower**

## INTERACTIVE NETWORKING LUNCH

12.40

**PANEL DISCUSSION:**

**HARNESSING PROCESS INTELLIGENCE TO INFORM BETTER DECISION-MAKING AND STREAMLINE YOUR OPERATIONS**

1.30

- Uncovering why your processes may not be working like they should and assessing how you can make broad process improvements through greater operational intelligence
- Investigating what information you need to examine to deliver greater process knowledge back to the enterprise
- Customer Journey Mapping
- Advanced Process Mining
- Examining how clearer process intelligence can help you target and prioritize improvement initiatives
- Exploring how you can create an operational excellence and business transformation strategy around your process intelligence

**Session Hosted By Gero Decker, CEO & Founder, Signavio**

**Aboubacar Cissokho, Head of Discover Networks Lean Center of Excellence, Discover Financial**

**Joseph Toomer, Director Enterprise Process Excellence, USAA**

**Nat Ganesh, Director Process Excellence & Innovation, Verizon**

**ACCELERATING THE IMPLEMENTATION OF POWERFUL RPA PLATFORM FOR FAST AND SCALABLE AUTOMATION THAT WILL EVOLVE STRATEGICALLY AND INCREASE BUSINESS VALUE**

2.15

- Examining how automation can support your organizational goals and help make your company's vision come true
- Empowering your organization by developing your RPA journey as an internal, self-sustaining and scalable expertise to run and maintain robots
- Embedding RPA deeply and effectively into your organization and to redistributing accumulated knowledge and resources across future deployments
- Building the skills and capacity for RPA and creating a Robotic Operating Team as part of your Operational Excellence strategy
- Creating a scalable, functional & technical environment and articulating an effective governance model for your automation

**Session Lead By UI Path**

**INVESTIGATING HOW TO BETTER INTEGRATE YOUR OPERATIONAL EXCELLENCE WITH YOUR QUALITY STRATEGY**

2.45

- Examining Sonoco's Operational Excellence initiatives delivering successful productivity improvement
- Exploring strategies to ensure quality improves rather than suffers as a result of your OPEX initiatives
- Developing new ways of measuring success beyond cost savings and productivity improvement
- Bringing together a new team to deliver Quality & OPEX and drive a new way of thinking
- Transitioning to a new digital mind-set and achieving new levels of quality through a forward looking OPEX strategy

**Leslie Pemberton, VP Global Quality, Sonoco**

## ONE-TO-ONE BUSINESS MEETINGS & NETWORKING

3.20

### THINK TANK FOUR

EXAMINING HOW TO TRANSFORM THE MINDSETS OF YOUR  
WORKFORCE TO CREATE A CULTURE OF PROCESS IMPROVEMENT

3.20

Paige Buechley, Director, Process Improvement and Change, The University of Texas System

## ONE-TO-ONE BUSINESS MEETINGS & NETWORKING

3.55

## ONE-TO-ONE BUSINESS MEETINGS & NETWORKING

4.30

### THINK TANK FIVE

EXAMINING HOW TO TRANSFORM THE MINDSETS OF YOUR  
WORKFORCE TO CREATE A CULTURE OF PROCESS IMPROVEMENT

4.30

Doug Drolett, Continuous Improvement Leader Americas, Shell

## C-SUITE PANEL DISCUSSION:

### ENGAGING FROM THE C-SUITE DOWN IN YOUR OPERATIONAL EXCELLENCE PROGRAMS

5.00

Operational excellence requires support from leaders across the whole organization. It is not enough to simply achieve buy-in from your CFO and expect the rest of the business to follow suit. Process transformation requires buy-in from across the whole C-suite. In this panel discussion we bring together a number of C-Suite Experts to discuss how they are driving operational excellence forward in their department and are supporting the business as a whole.

- How can you achieve buy-in across the C-Suite of your organization?
- How does process excellence and operational transformation affect different functions within your organization?
- What leadership programs have you developed to create an operational excellence mindset?
- What is your primary focus to achieve through operational excellence and business transformation?

Donald Kuk, Chief Transformation Officer, TBC

Ken Goldman, Former Global CFO, Yahoo!

Mollie Bell, Chief Transformation & Engagement Officer, Credit Union National Association

James Webb, Chief Operating Officer, Farmers of North America





## CLOSING KEYNOTE:

### SHIFTING THE PARADIGM OF YOUR ENTERPRISE TO BE MORE TRANSFORMATIONAL TO BUILD A WORLD CLASS CONTINUOUS IMPROVEMENT PROGRAM

5.50

- Moving from a point systems to an end-to-end operating system to encourage a transformational mindset
- Developing a clear vision for optimizing the organization and preparing for a full "eco-system" solution
- Examining how a shift from point systems solutions to an E2E eco-system model will result in increased transparency, greater returns and pull-through rates and gaining a competitive advantage
- Achieving buy-in across the organization to ensure all legs of your CI stool work in collaboration
  - Risk, People, Process and Technology
- Aligning your organizational strategy with your technology needs to work towards a scalable solution that integrates all aspects of your operation

David Hadd, SVP Continuous Improvement, Webster Bank

## CLOSING REMARKS

6.20

Gregory North, Founder & President, Globe North

## NETWORKING DRINKS RECEPTION

6.30

*Create new lasting connections over drinks following an insightful day one at the OPEX Exchange. Drink, dine and debate with your new peers in this picturesque setting as we unwind for the evening.*

Hosted By ThoughtExchange

END OF EXCHANGE DAY ONE

## REGISTRATION AND COFFEE

07.00

### BREAKFAST BRIEFING:

#### CREATING A RESILIENT AND SUSTAINABLE OPEX STRATEGY THROUGH TECHNOLOGY TO SECURE YOUR OPERATING MODEL FROM DISRUPTION

07.30

- Preparing your enterprise for disruption through a resilient and sustainable operational excellence strategy
- Developing a mindset and culture of innovation to ensure your enterprise stays ahead of disruption
- Futureproofing your organization through a combination of sustainable and scalable problem-solving methodologies
- Scaling your continuous improvement culture across all functions and locations to ensure an organization-wide focus on performance improvement

## OPENING REMARKS FROM THE CHAIR

08.20

Gregory North, Founder & President, Globe North

### OPENING KEYNOTE:

#### PROVIDING AN OVERVIEW OF A MULTI-YEAR CONTINUOUS IMPROVEMENT JOURNEY

08.30

- Transforming a successful business from a traditional project oriented system using standard improvement thinking and tools into a focused, high performing continuously improving organization
- Utilizing both the LSS tools and the DMAIC process to give you a variety of problem-solving methodologies that will equip your enterprise
- Changing how the business talks about CI as well as the ongoing training and improvement activities from the top to the bottom of the organization
- Keeping our costs for our customers as competitive as possible while delivering a superior product through our continuous improvement system
- Building your own maturity model and taking your organization on a never-ending, multiyear journey to a Continuous Improvement organization



Aubrey Jones, Senior Director Global Continuous Improvement, Ingredion

## BUGS BUNNY AND THE CASE OF THE LEARNING CULTURE

09.00

In this interactive session participants will be asked to consider learning and culture in some new ways. We'll discuss process, brain science, group learning and we'll get a chance to put Thoughtexchange through its paces as we explore what is important to the group.

Dave MacLeod, CEO, Thoughtexchange

## CREATING A VISION ROADMAP TO TIE DIGITAL TRANSFORMATION TO YOUR CORPORATE STRATEGY

09.30

- Supporting corporate initiatives and strategy through digital transformation and innovation groups within your enterprise
- Creating a lifelong customer strategy through digitalization and voice of customer programs
- Focusing on digital as a path to efficiency and making life easier for your consumers
- Improving self-service operations through mobile integration and RPA proof of concepts
- Rolling out new lean programs to streamline processes before you digitally transform

Veradej Thongintra, VP Head of Corporate Strategy & Digital Transformation, Hyundai Finance

## ONE-TO-ONE BUSINESS MEETINGS & NETWORKING

10.05

## ONE-TO-ONE BUSINESS MEETINGS & NETWORKING

10.40

## ONE-TO-ONE BUSINESS MEETINGS & NETWORKING

11.15

## EXCLUSIVE C-SUITE WORKSHOP

10.05

### GUIDING CONTINUOUS IMPROVEMENT THROUGH AGILE & SCRUM FRAMEWORKS

- Examining how you can adopt new agile methodologies and ways of working to drive continuous improvement and innovation
- Using a scrum behavioural framework to develop a standardized, repeatable process that can be repeated in any context
- Helping to guide transformation through implementation of agile as a foundation for teaching
- Becoming an advocate for agile in your enterprise and changing mindsets to drive quality improvement and waste reduction
- Building and coaching teams to deliver new agile ways of working across your enterprise

Nigel Thurlow, Chief of Agile, Toyota Connected

**TAILOR-MADE OPEX ROUNDTABLE DISCUSSIONS:  
HAVE YOUR SAY!**

11.50

**TABLE ONE**

**DESIGNING A UNIFIED OPEX CULTURE - WHAT CHALLENGES DO WE FACE IMPLEMENTING LEAN PRACTICES ACROSS DIFFERENT CORPORATE/INDUSTRIAL ENVIRONMENTS?**

**Stephen Indelicato**  
Director Operational Excellence, Global Quality  
Bristol-Myers Squibb

**TABLE TWO**

**IMPLEMENTING LEAN WORKING AT SCALE IN A LARGE ORGANIZATION**

**Stephen Sledge**  
Continuous Improvement Director  
Walmart

**TABLE THREE**

**OPERATIONAL EXCELLENCE AND CULTURE CHANGE**

**Rob Stewart, President, OPUSWORKS**

**TABLE FOUR**

**LEADING FROM ABOVE:  
C-SUITES ROLE IN OPERATIONAL EXCELLENCE**

**SPONSORED SESSION:**

**USING BUSINESS PROCESS MANAGEMENT TO ENABLE TECHNOLOGY SOLUTIONS TO SUPPORT THE MOVE TO A CONTINUOUS IMPROVEMENT ENTERPRISE**

12.40

- Documenting and mapping out business processes and seeking IT solutions that enable the process
- Aligning your business transformation with your IT strategy to support your change management
- Engaging with project teams on IT solution to execute communication, training and support
- Ensuring alignment between business and IT key stakeholders to ensure delivery of your process management strategy through support tools
- Developing and delivering a technology solution and successfully managing the change

**For more information on how to get involved please contact Ina Ukstina, Commercial Director at [ina.ukstina@iqpcexchange.com](mailto:ina.ukstina@iqpcexchange.com)**

**ONE-TO-ONE BUSINESS MEETINGS & NETWORKING**

1.15

**INTERACTIVE NETWORKING LUNCH**

1.30

## ONE-TO-ONE BUSINESS MEETINGS & NETWORKING

### THINK TANK SIX

#### CONSOLIDATING YOUR SYSTEMS INTO A SINGLE PLATFORM TO REDUCE INEFFICIENCIES WITHIN THE ENTERPRISE

2.30

Aboubacar Cissokho, Head of Discover Networks Lean Center of Excellence, Discover Financial

## WINNING THE CULTURE BATTLE...FINALLY

3.00

How subtle shifts in our change management approach allowed us to change the culture of the enterprise to meet our targets in a more efficient, cohesive, and cost-effective manner.

- Learning to speaking the same language across the organization
- Finding better ways to measure success
- Enrolling co-conspirators that can help champion your change
- Establishing a brand and marketing your successes

Kevin Kellow, Director Process Improvement, BAE Systems

## IMPROVING KNOWLEDGE CENTERED SERVICE TO DRIVE SYSTEMIC CONTINUOUS IMPROVEMENT

3.30

- Examining how you can improve your customer communication and engagement processes
- Optimizing your customer journey process to result in higher levels of customer satisfaction and quality
- Combining the benefits of customer satisfaction and curated knowledge to bolster your CI strategy
- Building a long-term roadmap to improving the customer journey and creating a more customer-centric organization
- Putting the customer at the center of your quality and continuous improvement strategies

Cheryl Tulkoff, Director Corporate Quality & Continuous Improvement, National Instruments

## DEVELOPING AN END-TO-END APPROACH FOR YOUR TRANSFORMATION TO BETTER SUPPORT YOUR ORGANIZATIONAL STRATEGY

4.00

- Working as internal consultants within the enterprise to identify key opportunities across the company and support transformation across all business functions
- Leading the organizational transformation to ensure it is sustainable and to guarantee traction within the enterprise
- Marrying key principles of process excellence with technology enabled capability development
- Creating business value through a strategic end to end approach
- Assessing strategic opportunities for where automation can support your business transformation

Matthew Gill, Director Operations Excellence, Abbvie



## BEYOND OPEX:

### BRANCHING OUT FROM TRADITIONAL PROCESS IMPROVEMENT METHODOLOGIES TO DELIVER A HOLISTIC TRANSFORMATION ACROSS YOUR ORGANIZATION

4.30

- Looking beyond lean six sigma and other traditional OPEX techniques to include more problem-solving methodologies
- Identifying challenges and opportunities to better resolve business processes throughout the US Army
- Revitalizing what is seen as best practice for dealing with your process and performance initiatives
- Using data science as part of your continuous improvement to better understand and help resolve your process challenges
- Exploring how leadership in all levels of The Army must work to increase efficiencies effectively in back-end processes
- Breaking down silos and working with leaders across your whole business to develop a culture of continuous process improvement

Dr Charles Brandon, Director Process Improvement Program Office, HQDA, Office of Business Transformation

## CHAIR'S CLOSING REMARKS

5.15

Gregory North, Founder & President, Globe North

## END OF EXCHANGE DAY TWO





11TH - 13TH APRIL 2018 - THE WESTIN AUSTIN AT THE DOMAIN, AUSTIN, TEXAS

SPONSORS FOR 2018 INCLUDE:

