



# Lean Continuous Improvement Summit

*do more better*

## Conference Keynote

**Rebecca Kleefisch** is Wisconsin's 44th lieutenant governor. Since January 2011, she has been Wisconsin's Jobs Ambassador, a champion for worker training, and a leader for creative solutions to our state's toughest challenges.



A former small business owner, Rebecca developed the annual Governor's Small Business Summit. She works frequently with economic developers and business owners to recruit new businesses and grow current employers. Her colleagues elected her chair of the national Aerospace States Association, which advocates for our aviation and aerospace industries. And as Wisconsin creates more jobs, she's working hard to expand the talent pipeline that fills them.

Rebecca wants our state's success to embrace all our citizens, especially those who must overcome barriers to prosperity. So she co-chairs the Governor's Task Force on Minority Unemployment and the Governor's Task Force on Opioid Abuse, works on the issues of homelessness and offender reentry, and advocates for returning veterans and people with disabilities looking to join the workforce.

Through her travels and activities, Rebecca's earned a reputation as an effective policy leader who doesn't shy from a challenge or a fight. She has been recognized with a "Courage in Leadership Award" by the Faith & Freedom Coalition and a "Woman of Exceptional Courage" award from the Clare Booth Luce Institute. In May 2014, the Washington Post cited her as one of 40 rising stars in American politics.

Rebecca is a colon cancer survivor, a recovering news reporter, a member of the NRA, and graduate of the University of Wisconsin-Madison. She is the mother of two daughters, Ella and Violet, and lives in Oconomowoc with her husband, State Representative Joel Kleefisch.

## Morning Plenary Session

American Family is undergoing a cultural transformation to bring its traditional customer focus to a whole new level through: collaboration, experimentation, empowering people closest to customers and processes to create an agile culture of experimentation and innovation.

With over 8,000 people and operations spread across the country, American Family has had many successful local process improvement efforts that never scaled into a coordinated companywide effort. Matt Cornwell will share how the company is changing that through the American Family Lean System, digital transformation, and driving change with their employees - not to them.



Matt Cornwell, Lean Customer Value Associate Vice President, American Family Insurance

Matt leads a team of lean coaches who support the company's cultural transformation efforts through the implementation of the American Family Lean System.

His team's purpose is to help the organization: empower employees closest to the customer, experiment, increase agility, and become more customer driven. In his thirteen years at American Family, Matt has held leadership roles in process improvement, strategy, corporate planning, and executive administration functions.

Matt started his career as an industrial engineer and earned a six sigma black belt before joining American Family

## Intensive Sessions

### Business Transformation- Delivering Results In 90 Days

Are you interested in transforming the results from your processes in 90 days? Leveraging a proprietary approach and combination of the best integration of continuous improvement methodologies your company, division or function can achieve exceptional results! Our proven approach is

built from over 20 years of helping transform organizations into high performing companies. Understanding this approach can help if you are looking for a proven performance improvement approach or are looking to strengthen your existing capabilities. This intensive hands-on session will walk you through the process and engages you in exercises that show you how to create a “model process” that doubles the good, halves the bad and doubles the speed!

Chris Vogel specializes in the Development of Lean Leaders and Administrative Lean. He has over 15 years of Lean Administrative and Process Improvement experience including holding a variety of senior management positions in Operations Management, Lean Deployment, Financial Analysis & Planning and Information Technology. During his 15 years at Wells Fargo, Chris led and used Lean to transform a division of Wells Fargo with 1,200 staff members. Starting in 2002 new costs of imaging and data lifting in Wells Fargo were rapidly rising due to independent growth across organizational lines. The Document Management department was formed to control costs through focused vision, consistent technologies and reduction in redundant processes. Taking the leadership of this department Chris saw the opportunity for Lean / Six Sigma / Operational Excellence and began to drive culture, knowledge, and tools learned from the Toyota Production System. The actions undertaken created a transformation of processes, physical environment, and most importantly, mindset. While the numerical results clearly proved the worth of this approach, we were also able to fully engage our work force completing the transformation with retention of nearly 100% of the original workforce.

### **IBM Design Thinking**



Ready for a new way to work? Enterprise Design Thinking by IBM can help.

Design Thinking is a collaborative and inclusive way for cross-disciplinary teams to address complex problems with human focus. In basic terms, Design Thinking is a practical framework for action. Learn how IBM is embracing Design Thinking and Agile in concert to enable greater client value and measurable outcomes. In this interactive session, Justin will engage you in the Enterprise Design Thinking framework and expound on the benefits within reach for any organization willing to do the same.

Justin Gilbert is an Enterprise Design Thinking Coach, Master Black Belt, IBM Mentor, Supply Chain Engineer, Performance Excellence Advocate, Industry 4.0 Explorer, Midwest Country Lover, Dad, “Creative Confidence” Builder, and a Performance Excellence Network 2017 Karl Shurson Quality Award Recipient!

### **Gemba Tours**

Join us at the gemba for a chance to see the American Family Lean System in action and interact with teams that are implementing it.



Nichole Caya, Director of Lean Customer Value, American Family Insurance.

Nichole helped design the American Family Lean system and the implementation strategy used across the enterprise. She manages the day to day operation of the system and works with all levels of employees and leaders to teach, coach, and execute on lean principles.

In her eleventh year at American Family, Nichole has led teams responsible for continuous improvement, planning, divisional strategy, analytics and reporting, and has led numerous improvement initiatives across the organization.

Prior to her work at American Family Insurance, she practiced six sigma at a global pharmaceutical company.

### **Concurrent Breakout Sessions**

#### **Standard Work and Error Proofing**

Standard work is a system. While we often think standard work as a procedural or work instruction artifact, it is a system, a life cycle. And for it to work well all the parts need to be there. The system needs standard procedures, metrics, problem solving, experimentation, counter measures and implementation back to standard procedures.

Error proofing occurs in problem solving and experimentation phase. It's here where we use the controlled experiments (limited changes) to see how the process reacts to our counter measures, knowing that making too many changes at once makes it extremely difficult to know what is improving and what is not improving the process.

Joe Gergen has spent last 15 years working in the mortgage banking industry, specifically in the Servicing arena, on continuous improvement activities using lean engineering, change management, A3 problem solving and standard work philosophies. His recent experience includes

working in an Agile environment supporting a technology delivery team, with activities including continuous improvement liaison between technology and operations as well as training of internal staff on A3 problem solving, lean, Agile grooming, communications and other foundational continuous improvement skills.

## Leading Lean

Personal Lines Underwriting Operations is the largest product line operations group at American Family Insurance with over 500 employees spread across three regional offices. Over the last four years they have led the organization in adoption of lean behaviors and tools. In this session, we will hear from their leader, Bob Andrew to learn about his team's lean journey. He will share his experiences and tips as both a lean leader, and an internal customer of lean coaching.



Bob Andrew, Personal Lines Underwriting Operations Associate Vice President, American Family Insurance

In his role, Bob has overall accountability for Underwriting, policy administration and agency support center operations for Personal Lines. Prior to his current role, Bob led the Business Excellence team, which consisted of Corporate Planning & Program Management, Lean Customer Value, Change Leadership, and Sourcing and Procurement. He also led the Advance business transformation program and was responsible for all change leadership aspects to all employee and agency stakeholder groups. Bob began his career at American Family as part of the Marketing team, where he held roles in Product Marketing and Strategy.

Prior to joining American Family, Bob was a small business owner, Marketing Vice President at WPS Health Insurance in Madison, Wisconsin and Vice President of Client Services at Event Management Corporation in Grosse Pointe Farms, Michigan. He has also held various Marketing roles in his career.

## Racial Equity Impact Analysis Tools

You may have heard of an environmental impact analysis – but have you heard of a similar tool to address potential inequities in processes, systems, and work flows? The City of Madison has been piloting the use of Racial Equity Tools to help with decision making in everyday work as well as in hiring. Come learn more about how to ensure that your processes are as equitable as possible and producing excellent results for everyone regardless of socioeconomic status or race.

## Process Mapping for Beginners

Learn how to use the most important continuous improvement tool: the process map! In this breakout session, Samuel Schmitt from the State of Wisconsin's Lean Government Program will teach an introductory process mapping course. Samuel will start the session by explaining the fundamentals of process mapping before having you split up into groups for a hands-on process mapping activity. This session is ideal for beginners who haven't been involved in a process mapping activity before.

Samuel Schmitt is a Continuous Improvement Consultant with the State of Wisconsin's Lean Government Program. In this role, Samuel is responsible for leading projects, developing training material, and offering advice to Lean teams in state agencies.

Samuel has a master's degree in Industrial Engineering from the University of Wisconsin-Madison and has been improving processes within the State of Wisconsin since 2015. Prior to joining state service, Samuel received local and international recognition for the continuous improvement projects he completed in the healthcare sector.

## Operational Efficiency and Effectiveness through Kaizen

Learn how Goodwill Retail Services of Southeastern Wisconsin achieves operational efficiency and effectiveness through the use and deployment of kaizen, and kaizen principles.

Carrie Cyr leads Goodwill Retail Services Training and Development team. She and her team are responsible for the ongoing growth, development and engagement of GRS' over 3,000 employees. She's facilitated numerous kaizen events, and is a leader in change management and process improvement.

Peter LaBonte is Goodwill Retail Services Director of Performance Excellence. As a member of the Retail Services leadership team, he is responsible for the development and implementation of Retail Services process improvement and performance excellence strategies and initiatives.

## Metric of Urgency: The Best Metric to Prioritize Your Work

The way organizations approach strategic issues determines their level of success or failure. Senior leaders are looking for improved



results. Process owners and project leaders are challenged to initiate and prioritize new projects on a daily basis. Organizations must align around the vital few projects that will deliver results that matter.

You need an approach to achieve Meaningful Impact.

The “Metric of Urgency Way” (based on the principles of Lean Six Sigma) is a methodology designed to work within any process improvement framework and deliver Meaningful Impact. Metric of Urgency Way consists of 7 key components which must be followed to solve any strategic challenge. While the process remains the same, the level of rigor to execute each step may vary significantly with the magnitude of the problem. At the center of the Metric of Urgency Way sits

the **Metric of Urgency** – a process metric that acts as the leading indicator to improve strategic outcomes and it prioritizes the work!



Join Edwin Boon and Mike Gratz from MiPro and learn how to select the key metrics that deliver change that matters. Develop problem statements, explore leading and lagging metrics and learn how your organization can stay focused on the vital few projects.

## Improving Processes and Programs to Maximize Enrollments at Chippewa Valley Technical College

During times of high employment, enrollment at colleges and universities typically declines and that was the case at Chippewa Valley Technical College in Eau Claire. In an effort to reverse this trend, increase enrollments, and produce more graduates, the college is streamlining and improving several processes and programs. The areas of the college that are engaged in this effort include student recruitment, admissions, financial aid, scheduling as well as high school relations, several academic and apprenticeship programs.



Julie Furst-Bowe currently serves as the Academic Vice President at Chippewa Valley Technical College, a multi-campus institution serving more than 16,000 students annually in the Wisconsin Technical College System. Dr. Furst-Bowe served as the Chancellor of Southern Illinois University Edwardsville from 2012 to 2015 and as Vice Chancellor for Academic and Student Affairs at the University of Wisconsin-Stout from 2005 to 2012. She has also served as a tenured faculty member, graduate program director, department chair, associate vice chancellor and assistant chancellor for assessment and quality improvement.

## What's a data intermediary and what can they do for you?



Data intermediaries come in all shapes and sizes. What they have in common is that they bridge the gap between data and local stakeholders: nonprofits, government agencies, foundations and residents. They access data that are often confidential and indecipherable to the public and make them accessible and useful. They connect people who need data to people who have data. Imagine if you had access to the data you need. Or if having data meant it was the right data to answer your questions. But good data doesn't just happen. Learn what Data You Can Use is doing in Milwaukee to build local capacity and uncover useful, actionable information.

Kathleen Pritchard is President of DATA YOU CAN USE, Inc., a Milwaukee-based nonprofit organization that works with foundations, government, and other nonprofit organizations to access and use data to inform decisions and improve communities. She is a skilled evaluator and specializes in integrating quantitative and qualitative data to measure success and communicate results. She is also a seasoned planner and implementer of cross-sector efforts that are informed both by theory and the voice of those most affected. Her work includes contributions to articles and textbooks on evaluation in scholarly journals and textbooks.

Katie holds a Ph.D. in Political Science, a Master's Degree in Public Administration and has served as a policy and research analyst, and consultant for the State of Wisconsin, Milwaukee County and the City of Milwaukee. Additionally, Ms. Pritchard served three terms as the elected President of the Village of Whitefish Bay, was a Director of the North Shore Fire Department, and on the Executive Council of Metropolitan Milwaukee Sewerage District, and the Lake Front Development Advisory Commission.

In the nonprofit sector, Dr. Pritchard was President and CEO of the Planning Council for Health and Human Services, and before that Director of Community Impact for the United Way of America where she led the national outcomes measurement work and the community engagement Standards of Excellence. She serves on the Research Committee of the Public Policy Forum, the Chair of the Data Council for Milwaukee Succeeds and as Milwaukee's representative to the Urban Institute's National Neighborhood Indicators Partnership. She is a founding member of Healthier, Safer, More Prosperous Milwaukee.