APQC’S 2019 PROCESS & PERFORMANCE MANAGEMENT CONFERENCE

Breakout Sessions and Descriptions

BREAKOUT SESSION TRACKS

The breakout sessions for the 2019 Process & Performance Management Conference (PPMC) are categorized into five topical tracks. Attendees are not required to follow any single track and can move between tracks to choose the ideal combination of sessions to suit their needs.

Sessions are blocked by the times offered. You may only attend one session per block, but follow-up materials for all sessions will be provided to conference attendees.

<table>
<thead>
<tr>
<th>Track</th>
<th>Description</th>
<th>Key Topics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aligning for Growth</td>
<td>This track focuses on business integration and supporting the strategic goals of the organization.</td>
<td>strategic alignment, organizational strategy, governance, business integration, critical knowledge, and risk</td>
</tr>
<tr>
<td>Driving &amp; Sustaining Change</td>
<td>This track focuses on overcoming organizational resistance and engaging the workforce in change initiatives.</td>
<td>buy-in, communications, the change journey, employee engagement, and organizational resistance</td>
</tr>
<tr>
<td>Managing &amp; Improving Processes</td>
<td>This track focuses on the optimization of underlying processes and how to achieve more efficient results.</td>
<td>defining and improving processes, continuous improvement, process frameworks, process maturity models, and the value chain</td>
</tr>
<tr>
<td>Optimizing Data &amp; Digitalization</td>
<td>This track focuses on digital efforts in the organization through analytics and the adoption of new technologies to manage and improve organizational performance.</td>
<td>data management, predictive analytics, data-driven decision making, automation, simulation, and digitalization</td>
</tr>
<tr>
<td>Aligning Improvement to District Goals</td>
<td>This track includes the benefits of process improvement and aligning to the strategic goals in the education industry.</td>
<td>process improvement, strategic alignment, stakeholder engagement, and continuous improvement</td>
</tr>
</tbody>
</table>
## SCHEDULE

<table>
<thead>
<tr>
<th>Block 1</th>
<th>Thursday</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strike Team: A Case Study in Conscious Leadership</td>
<td>Aligning for Growth</td>
</tr>
<tr>
<td>Driving &amp; Sustaining Change Creating a Culture of Outcomes</td>
<td>Managing and Improving Processes Enabling Technology for Digital Transformation and Streamlined Processes</td>
</tr>
<tr>
<td>Optimizing Data &amp; Digitalization Simulation for Process Improvement at the Vancouver Fraser Port Authority</td>
<td>Aligning Improvement to District Goals Lean Approach to Process Improvement</td>
</tr>
<tr>
<td>Making Process Actionable Think Tank</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Block 2</th>
<th>Thursday</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Planning Alignment</td>
<td>Let’s Get Intentional About Accelerating and Sustaining Process Improvement Behavior Change Coaching for Lean Transformation</td>
</tr>
<tr>
<td>Pursuit of Excellence through Standardizing Core Processes and Process Mapping</td>
<td>Value Pursuit Utilizing Enterprise Process Optimization and Standardization</td>
</tr>
<tr>
<td>TAOS - Targeted Automation</td>
<td>Building Momentum Together: Our Journey of Continuous Improvement</td>
</tr>
<tr>
<td>Data and You: Finding, Collecting, and Organizing a Life Think Tank</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Block 3</th>
<th>Thursday</th>
</tr>
</thead>
<tbody>
<tr>
<td>Four Steps to Improve &amp; Monetize Your Process Improvement Program</td>
<td>Reinventing Your Talent Ecosystem</td>
</tr>
<tr>
<td>Improving Process Execution and Lowering Risk through Knowledge Management Influencing Change through Process Visualization</td>
<td>Digital Process Transformation - A Value-driven Approach</td>
</tr>
<tr>
<td>Ready, Set, Go! Continuous Improvement Using Quality Tools</td>
<td>Lightning Session: How APQC Members Use APQC Process Frameworks</td>
</tr>
<tr>
<td>Value Chains, Policy Busting and Concept Models – Key Engineering Techniques for Escaping Silos</td>
<td>Enhancing Business Value Through Project Training &amp; Mentoring</td>
</tr>
<tr>
<td>Digital Divide - And What to Do About It</td>
<td>Yes, and...Moving a School District from Great to World-Class Using Process Improvement and Innovation</td>
</tr>
<tr>
<td>Shaping the Future of the PCF®</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Block 4</th>
<th>Thursday</th>
</tr>
</thead>
<tbody>
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<td>Being Agile: Adapting Design Processes</td>
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</tr>
<tr>
<td>Improving Process Execution and Lowering Risk through Knowledge Management Influencing Change through Process Visualization</td>
<td>Digital Process Transformation - A Value-driven Approach</td>
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</tbody>
</table>

<table>
<thead>
<tr>
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<th>Friday</th>
</tr>
</thead>
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</tr>
</tbody>
</table>
SESSION DESCRIPTIONS

BLOCK 1

Strike Team: A Case Study in Conscious Leadership
Thursday | Aligning for Growth

Government entities have a reputation as hierarchical, conservative, and characterized by silos. Ohm Engineering interviewed front-line employees, that were able to enact significant change at a western North-American municipal utility, without official supervisory titles. They were assigned to a failing multi-million-dollar project on the verge of cancellation and encountered a widespread lack of adherence to core values and strategic goals, accountability, collaboration, and innovation.

Participate in this session to learn how:
- conscious leadership drove trust in the organization,
- the self-driven team members aligned the goals,
- to standardize team processes, and
- transition from the worst performing capital program to a model for success.

Creating a Culture of Outcomes
Thursday | Driving & Sustaining Change
Presenters: Mary Nelipovich & Kristin Walle | ADP

In a world where businesses shift strategies at a rapid-fire pace, and virtual unification has created equality amongst competitors, it is critical for Portfolio Management Offices (PMO) to expand their measures of success, and span of control, to include the management of desired outcomes. PMO’s are uniquely positioned and qualified to provide objective, transparent benefits realization identification, management, and fortification. Risk mitigation is our wheelhouse!

It is time to look beyond the delivery of the project, and to grab a seat at the strategy table so that the organizations we support have an impenetrable portfolio of strategic initiatives with a high likelihood of success. Participate in this session to hear ADP’s Mary Nelipovich and Kristin Walle discuss the importance of the PMO in driving strategic alignment and the critical role we must play in driving outcomes in addition to outputs.

Enabling Technology for Digital Transformation and Streamlined Processes
Thursday | Managing & Improving Processes
Presenters: Kevin DePree | Rand Group - Exclusive Conference Sponsor

Today’s businesses are facing a multitude of challenges: distributed work force, inefficient processes, increased competition, and customer demand to name a few. All key drivers of
organizations’ digital transformation initiatives. Unfortunately, most organizations weren’t designed for the digital world. Systems are too fragmented, their operations too complex. Maybe that’s why digital transformation is easy to talk about but difficult to actually achieve. Organizations often make three, well-intentioned mistakes:

1. They focus on channels rather than journeys — reinforcing the same old disconnected experiences.
2. They attempt to automate existing tasks — rather than redesigning end-to-end experiences that deliver outcomes.
3. They maintain silos — instead of building experiences that cut across boundaries.

To transform the right way, doesn’t mean ripping everything out and starting over. Instead, harness technology to make your organization a better version of itself: more efficient, more customer-centric, and more resilient in a time of constant disruption.

In this session you will see how Rand Group enables digital transformation using technology such as the Microsoft Power Platform (Microsoft Flow, PowerApps, and PowerBI).

**Simulation for Process Improvement at the Vancouver Fraser Port Authority**

**Thursday | Optimizing Data & Digitalization**
**Presenters: Erez Iancu Ben Haim & Luis Lopez | Vancouver Fraser Port Authority**

Simulation modeling provides a risk-free, cost efficient mean of examining the operation of complex processes and test improvement ideas before they are implemented. In this presentation, Vancouver Fraser Port Authority’s Erez Iancu Ben Haim and Luis Lopez will share their experience establishing a successful simulation program to support the improvement of operational and knowledge-related processes.

Participate in this session to learn about:

- a three-phase methodology to deliver simulation projects (Define, Design, and Deliver);
- how the usage of simulation models has allowed process owners and their stakeholders to visualize current state processes, test potential improvements and support decision making;
- two successful simulation projects at Vancouver Fraser Port Authority, and
- lessons learned from their projects.

**Lean Approach to Process Improvement**

**Thursday | Aligning Improvement to District Goals**
**Presenters: Dr. Deborah Posner | Broward County Public Schools**

As a highly effective approach to quality assurance, Lean Six Sigma focuses on continuous improvement tools and techniques to eliminate waste, increase productivity, and achieve breakthrough results in performance excellence. Broward County Public Schools’ executive director for strategic initiative management, Dr. Deborah Posner, applies her skills and experience as a Lean Six Sigma Black Belt to facilitate process improvement projects throughout the district.
Participate in this session to hear Dr. Posner share how:
- she has launched and successfully facilitated a process improvement program at the sixth largest District in the country;
- to form and train cross-functional teams to apply the Lean Six Sigma framework; and
- how certifying hundreds of employees as Lean Six Sigma White and Yellow Belts extends her team, or ‘Champions of Continuous Improvement’ across all levels of the District.

Think Tank
Thursday | Making Process Actionable

Join like-minded peers during crowd-sourced think tank sessions to explore ideas and gather lessons. Lightly facilitated by seasoned process professionals, participants will build on each other’s ideas for concepts that can immediately be taken back to the office!

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BLOCK 2

Business Planning Alignment in Shell
Thursday | Aligning for Growth
Presenters: Eric Thompson | Shell Exploration & Production Company

Business planning is a complex end-to-end process, that touches every part of an organization. From 2015 to 2017, Shell launched a series of in-depth improvement projects that focused on efficiency and organizational structure. In 2018, Shells’ unconventionals continuous improvement manager, Eric Thompson, embarked on a holistic improvement program that incorporates elements of process management such as: continuous improvement, Lean, strategy deployment, change management, organizational development, offshoring, and the application of technology.

Participate in this session to learn:
- background on the business problem Shell was trying to solve;
- an overview of what Shell did and the results; and,
- some of the methods, tools and models that were used, particularly on people, behaviors, culture and change management.

Let’s Get Intentional About Accelerating and Sustaining Process Improvement Behavior Change
Thursday | Driving & Sustaining Change
Presenters: Paul Fjelsta | accomplir, inc.
There are decades of research showing that the majority of improvement initiatives fail to meet performance expectations. We believe this performance expectation disconnect occurs because leadership is not effectively engaged and the specific behavior changes desired are not identified. Behavioral science defines behavior as "what we say or do". Typically, we see organizations speaking about behavior in a generalized manner. They end up with "behavioral" clichés without defining specific leader and performer behaviors. accomplish, Inc. has developed methodologies that integrate behavioral science into process improvement and technology deployment frameworks, to identify and prioritize performer and leader desired behaviors while engaging leaders to establish their active involvement and accountability for sustaining behavior-change dimension results and ROI.

Participate in this session as Paul takes a practitioner's viewpoint, focusing on behavioral science concepts and selected tools applicable to both:

- the participant's personal leadership behaviors, and
- their process improvement projects.

**Pursuit of Excellence through Standardizing Core Processes and Process Mapping**

Thursday | Managing & Improving Processes
Presenters: Mary De LaCruz Sabalbaro, MS, CLSSBB, CBPA | Adventist HealthCare Rehabilitation

In the past two years, Adventist HealthCare Rehabilitation's (AHC) director of business processes and projects, Marya De LaCruz Sabalbaro, has worked with her organization to map over 1,000 core processes; bringing its total processes mapped to 97%. In addition to mapping, process measures are also tracked and inspired process improvement at AHC.

Participate in this session to hear Marya’s journey and learn:
- AHC’s strategy for mapping its core processes;
- how to develop a plan utilizing the healthcare PCF;
- how to obtain leadership support and break through barriers; and,
- the outcomes realized by these efforts.

**TALOS - Targeted Automation: Lead, Order, Sale**

Thursday | Optimizing Data & Digitalization
Presenters: Jason Harms | Cherwell Software

Cherwell Software needed a program to streamline manual and sometimes duplicative processes in place to convert a prospect to a customer. This session will focus on a strategic initiative Cherwell built that is cross-functional, collaborative, and business-unit driven to streamline and automate the steps to convert a prospect to a customer. This process includes building the strategy, prioritization roadmap, and operational teams to support implementing projects and developing business process best practices that didn’t existed in the company before.

Participate in this session to learn:
how to align your business process operation to your strategic framework (and if you don't have a strategic framework, how to build one!);
• the importance of building standardized, repeatable templates early, using them quickly, and refine them often; and,
• how to leverage existing resources in building documentation to support an end-to-end project, even with limited resources.

Building Momentum Together: Our Journey of Continuous Improvement
Thursday | Aligning Improvement to District Goals
Presenters: Jason Radford | Boone County Schools

Boone County Schools is focused on resource optimization and working to improve instruction so that ALL students are college, career, and life ready. Several years ago, it experienced success in its operations department using process and performance management principles. Participate in this session as Jason Radford, director of process and performance shares:
• Boone County Schools’ process and performance management journey,
• Response to Intervention program, and
• the 5-step method that helps build momentum and capacity together.

Data and You: Finding, Collecting, and Organizing a Life
Thursday | Making Process Actionable
Presenter: Chris Dancy | The World’s Most Connected Man

Data abounds in every aspect of our lives. Not only are we constantly consuming data, we are also constantly producing data. But the hard part is understanding what data is useful, where it lives, and how to extract it.

In this session, Chris Dancy will explore these concepts using the relationship between peoples’ phones and data, for example, and answer questions like: Where do you live in your phone, where do your customers live in their phone? Can you extract data about your behaviors, desires, or cycles just by looking at the data on your phone?

Participants in this interactive session will learn about:
• understanding data triggers;
• aggregation systems and how to create them; and
• behavioral programming and triggers.

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BLOCK 3

Four Steps to Improve & Monetize Your Process Improvement Program
Thursday | Aligning for Growth
Presenters: Michael Mugford | DN Tanks & Carla Zilka | NexGen Advisors

This presentation is focused on the four key steps to a successful process improvement program. In this interactive session, participants will walk through a four-step process and toolkit, with real life examples from DN Tanks’ continuous improvement manager, Michael Mugford. Then, participants will get a chance to practice using the tools with example case studies. This is an open breakout session with lots of discussion, questions, and best practices to share.

Coaching for Lean Transformation
Thursday | Driving & Sustaining Change
Presenters: Margo Rose | Federal Home Loan Bank of San Francsico

Enterprise Lean Value Delivery is responsible for establishing lean leaders across the bank to drive the most meaningful outcomes for the enterprise through a holistic lens on the end-to-end process, automation opportunities, and the use of Lean design thinking. Developing Lean capability is intended to drive a company-wide Lean transformation effort with a key focus on process re-engineering and execution excellence that results in superior business results. This session will talk about establishing the infrastructure to build Lean capability within a financial services organization.

Participate in this session as Federal Home Loan Bank of San Francisco’s Margo Rose discusses:
• selecting team members,
• establishing a Lean framework,
• and building a pipeline of Lean ideas.

Value Pursuit Utilizing Enterprise Process Optimization and Standardization
Thursday | Managing & Improving Processes
Presenters: Kevin Kaiser | Raytheon

In order to strengthen Raytheon's competitive position in a changing landscape, Raytheon pursues business process standardization to minimize cost and improve cycle time and quality; thus, delivering customer value. APQC's Aerospace & Defense Process Classification Framework (PCF)® enabled Raytheon to create a core common-language across businesses, enabling it to align people, processes, systems/tools, and information.

By defining the process workflow across the different stages of a product's lifecycle using the PCF, Raytheon was able to align its diverse businesses, provide process governance, help functional organizations speak a common language, and help identify key processes to optimize and automate.
Participate in this session as Raytheon’s system engineer/architect, Kevin Kaiser, shares how:

- Raytheon assessed business needs and opportunities to improve current business processes, and
- adopted standardized process based on APQC’s PCF to delivering more value to customers and impacting Raytheon strategy.

**The Evolving Role of Data & Analytics**
Thursday | Optimizing Data & Digitalization
Presenters: Marisa Brown & Andrea Stroud | APQC

During this session, APQC’s Senior Principal Research Lead for Supply Chain Management Marisa Brown and Senior Statistician Andrea Stroud will draw from several recent research projects with quantitative data, qualitative insights, and company examples.

Participate in this session to learn:

- how the data and analytics landscape is evolving,
- changes within organizations and their supply chain analytics over the past 3 years, and
- how organizations are evaluating their data and analytics efforts.

**Shifting Organizational Climate, Culture, and Expectations**
Thursday | Aligning Improvement to District Goals
Presenters: Dr. Todd Cramer | Maumee City School District

Over the past three years, Dr. Todd Cramer with Maumee City School District has been driving change—working to shift the climate, culture, and expectations within his organization. This session will focus on the establishment of core beliefs, strategic planning, as well as management techniques used to improve the districts’ organizational performance, including strategies and lessons learned.

Participate in this session to learn:

- how to find opportunities for improvement within your organization,
- the essential pieces you need to know before moving forward with organizational change, and
- how Maumee City School District’s went from a 24% approval rating to be named a Top Workplace by the University of Toledo.

**Think Tank**
Thursday | Making Process Actionable

Join like-minded peers during crowd-sourced think tank sessions to explore ideas and gather lessons. Lightly facilitated by seasoned process professionals, participants will build on each other’s ideas for concepts that can immediately be taken back to the office!
BLOCK 4

**Being Agile: Adapting Design Processes**
Thursday | Aligning for Growth
Presenters: Sophie Regnier | Booz Allen Hamilton

Many companies are switching gears from a waterfall to an Agile approach for developing products. However, the process documentation has not necessarily caught up with the way that people are actually doing things, and that's something we need to remedy. During this session, Booz Allen Hamilton’s senior quality advisor, Sophie Regnier, will share her journey, specifically, how to adapt design processes to reflect a new agile way of being.

Participate in this session to learn:
- basic agile principles, and what it means to "be agile;"
- waterfall versus Agile, and what Agile isn't; and
- a step-by-step, case study of how to adapt a waterfall-based design process to reflects agile methodologies.

**Reinventing Your Talent Ecosystem**
Thursday | Driving & Sustaining Change
Presenters: Amy Leschke-Kahle | The Marcus Buckingham Company, an ADP Company

Businesses today require a complete talent strategy built for maximum performance. Understanding how to build this requires diligent assessment of the latest research, best practices and current offerings. In this session, dive into what modern human resources looks like and how a complete talent strategy can fulfill business needs.

Participate in this session as Amy Leschke-Kahle reveals:
- the three key pillars in designing your talent ecosystem,
- how to rethink the perfect candidate,
- redesign the infrastructure that runs your people process, and
- reinvent how to unlock performance.

**Improving Process Execution and Lowering Risk through Knowledge Management**
Thursday | Managing & Improving Processes
Presenters: Carol Southwood & Joe Williams | Amgen

Do any of the following sound familiar: Have you read a SOP and walked away unclear how to do your job? Are you confused about where you fit in a larger process and your upstream and
downstream connections? Spent an overwhelming amount of time searching for additional information and resources? Tried to understand the expectations for your role but left with more questions than answers?

During this session, Amgen’s Carol Southwood and Joe Williams will provide an overview of process architecture and knowledge categorization that builds a direct relationship to advance process maturity and drive performance. Overlaying process knowledge (e.g., controlled documents and training) with end-to-end process design creates a holistic and comprehensive understanding for business process owners and roles identified.

Participate in this session to learn about:
• capturing and categorizing knowledge,
• aligning process knowledge to processes,
• identifying gaps and redundancies, and
• optimizing processes for the end user.

Digital Process Transformation - A Value-Driven Approach
Thursday | Optimizing Data & Digitalization
Presenters: Mathias Kirchmer | BPM-D

Over 70% of organizations worldwide have started digital transformation initiatives. New digital tools are available almost daily - and many of them have major business impact potential; helping organizations achieve a level of process performance never have thought of before. However, many organizations underestimate the challenges of digital business transformation, resulting in initiatives delivering little or no business value.

Participate in this session to hear BPM-D’s Mathias Kirchmer share:
• how organizations used the approach of value-driven digital process transformation;
• approaches, methods, and tools that help to focus on the right sub-processes; and
• how to sustain results through appropriate governance and hybrid workforce management, aligning people and digital technologies.

Ready, Set, Go! Continuous Improvement Using Quality Tools
Thursday | Aligning Improvement to District Goals
Presenters: Susan Allred | Susan Allred Consulting, LLC

During this session, Susan Allred, a process champion for Iredell-Statesville Schools (2008 Baldrige Award Winner) and an implementer of quality tools will discuss four quality tools. The four tools: PDSA, Plus/Delta, Data Questions, and 30-60-90 Day Planning; are free and easy to implement for classrooms, teams, schools, districts or states who are ready to begin a continuous improvement approach to improvement and effectiveness.

Participate in this session to learn:
• what each tool is,
• why and when to use each tool,
• a template for each tool, and
• an example of how each tool has been used.

**Lightning Session: How APQC Members Use Process Frameworks**  
Thursday | Making Process Actionable

This session is unique and features lightening round discussions. Well-seasoned Process Classification Framework (PCF)® users will share how their organization uses the PCF within a short time frame followed by an interactive Q&A with the audience.

Join this interactive session to:
♦ hear first-hand accounts of how organizations use the PCF,
♦ ask questions about implementing the PCF at your organization, and
♦ collaborate with your peers.

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**BLOCK 5**

**Value Chains, Policy Busting and Concept Models – Key Engineering Techniques for Escaping Silos**  
Friday | Aligning for Growth  
Presenters: Ron Ross | Business Rule Solutions

Silos continue to plague many organizations. They diminish lifetime customer experience, and act as a practical barrier to rapid product innovation and agile market response. In the larger picture, they also diminish overall worker satisfaction. How can the company move beyond silos? The first order of business is to provide executives and managers with an approachable, bite-size picture of what the business is about holistically. That requires a top-level value-chain view of its operations. But this view needs to be friendly to the fuel of the Knowledge Economy - knowledge.

Just tinkering with organizational charts or high-level processes won't do the trick. You'll also need to know how to work the levers of immediate improvement - business policies - and coordinate the stuff of communication - vocabulary.

Based on two real-life case studies with large organizations, this presentation explains how such a view can be created, then assessed to create a pragmatic plan for engineering silos away. Gain fresh insights about how your company can create actionable plans to operate more effectively. Truly workable answers aren't necessarily in the direction you've been looking!
Enhancing Business Value Through Project Training & Mentoring  
Friday | Driving & Sustaining Change  
Presenters: Northrop Gruman

Northrop Grumman’s Advance Technology Labs (ATL) was tasked with maintaining pace with the anticipated growth in production requirements for a major program. However, its Micro Electronics Die output was limited by the throughput, capacity, and yield of its manufacturing process steps. To address the anticipated increase in Die demand, Northrop Grumman needed to improve its processes. Hence it enlisted the Green Belt candidates to leverage their skills and concentrate their projects on these high-value process improvements.

Participate in this session as Northrop Grumman’s chief engineer, John King shares their:

- the Green Belt mentoring process,
- the improvement projects, and
- their combined impact on Integrated Circuit Die Production at ATL.

Influencing Change Through Process Visualization  
Friday | Managing & Improving Processes  
Presenters: Sarah Ricciardi & Rupesh Patel | The Vanguard Group

In The Vanguard Group’s old state, it was operating in business silos. It was a very inefficient process which led to multiple handoffs; a staggering 45% of work was not in good order, and quality errors were increasing. It wanted to tear down barriers and remove silos across all departments. Through Karen Martin’s book, Value Stream Mapping, The Vanguard Group learned to leverage the key framework for business transformation, found success in the co-location of employees, and eliminated the silo of work distribution.

Participate in this session to learn:
- why creating a visual map of a process is important and how it can influence impact and change for the business and directly to the customer;
- where to start, how to identify the need for change, and the key outcomes for your business; and
- why looking at the end-to-end process and key metrics can influence your current state and ways to get to your future state.

Digital Divide - And What to Do About It  
Friday | Optimizing Data & Digitalization  
Presenters: Charles Jessup | TechnipFMC

Have you ever felt like the technology that you have at home is better than the technology you use at work? We felt that way too. TechnipFMC, created a Digital Services and Innovation (DSI) team to help bring cutting edge technology from the marketplace into the workplace.

Participate in this session to hear Charles Jessup, TechnipFMC’s business facilitation manager, share:
• how FMC’s DSI team operates,
• give examples of applications that they built internally, and
• share some business results.

Yes, and...Moving a School District from Great to World-Class using Process Improvement and Innovation
Friday | Aligning Improvement to District Goals
Presenters: Karen Cheser | Ft. Thomas Independent Schools

The Ft. Thomas Independent Schools district, ranked #1 in Kentucky, has traditionally done well on standardized assessments and state-wide rankings. In spite of its achievements, the Board charged the district with continuing to excel on these measures, while at the same time ensuring its students were ready for the future, with no additional budget.

Participate in this session to hear Ft Thomas superintendent, Karen Cheser, discuss how the district used process improvement practices to decrease costs and increase efficiency (in areas such as maintenance, energy usage, technology, and instructional resources), as well as change management principles in order to bring the new district, Portrait of a Graduate, to life.

Register today!

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ABOUT APQC
APQC helps organizations work smarter, faster, and with greater confidence. It is the world’s foremost authority in benchmarking, best practices, process and performance improvement, and knowledge management. APQC’s unique structure as a member-based nonprofit makes it a differentiator in the marketplace. APQC partners with more than 500 member organizations worldwide in all industries. With more than 40 years of experience, APQC remains the world’s leader in transforming organizations. Visit us at www.apqc.org, and learn how you can make best practices your practices.