Global LEAN SUMMIT™

The 2025 Global Lean Summit Playbook

22-25
SEPTEMBER, 2025

20+
Industry Experts

Developing a Lean Organization

Global LEAN
EXECUTIVE PROGRAM™

A Year of Excellence:

Monthly Lean Mastermind Sessions
Japan Kaizen Learning Missions

Join us in Japan November 16th - 22nd, 2025 or
April 19th - 25th, 2026 or
November 15th - 21st, 2026

https://www.globalleansummit.com/japanmission/

The 2025 Global Lean Summit Playbook

Welcome to the Global Lean Summit

"Success is a journey,
not a destination.
The doing is often more
important than the outcome."

- Arthur Ashe

OUR COMMITMENT TO YOU:

Just like at work, we aim to continuously improve what we are doing during and after the summit. We will be asking for your Voice of the Customer feedback, and will adjust to make this an amazing experience for you. Your active participation and honest feedback are greatly appreciated.

We will track performance on our Summit Obeya Board by measuring our Summit KPIs. We will be tracking the sessions and speaker scores. How many times the "Gold Nugget" cards are used. How many "I'M STUCK" cards are resolved. There are a number of factors we will be measuring among the attendees, speakers, and sponsors. This is going to be FUN!!!

HOW TO PARTICIPATE:

You get out of it what you put into it, therefore Play Full Out! The best way to get the most out of the summit is to actively participate. Here are some other tips:

1. **Share with Your Network**, post about the Summit and use the hashtags: **#GlobalLeanSummit** and **#gls25selfie**
2. **Share Your Challenges:** What problem(s) are you working on? Share it at the Summit. Get help and give help. We will collaborate together to put you on a path to getting your answers.
3. **Network Between Sessions** with the speakers, other participants, and the sponsors, there is a lot to learn. Use the breaks to share and ask, you'll be glad you did.
4. **Invest in Yourself** and share when you have questions using the "I'M STUCK" card. *Don't be afraid to see red!*
5. **Have Fun and Actively Participate** for chances to win prizes. More on that later.

PRE-SUMMIT WORKSHOP DAY

MONDAY
SEPTEMBER 22ND

WORKSHOP SCHEDULE

Registration Opens/Breakfast
7:00am

Workshops
8:30am


Setting Up Your Obeya Room – Part 1 – All-Day Workshop – Sam McPherson, Founder – Lean Leadership Academy


Foundational Lean 101: Continuous Cost Improvement – Jared Thatcher, Host – Global Lean Summit

SUMMIT DAY 1

TUESDAY
SEPTEMBER 23RD

DAY 1 SCHEDULE:

Registration Opens/Breakfast
6:30am

Summit Kick-off
8:00am

Break (15 minutes)
8:30am

Session 1
8:45am

Lean Leadership Track


Olaf Boettger – VP DBS, Biotechnology Group at Danaher – "Execution is the Only Strategy Your Customers Ever See: Hoshin Kanri Lessons from 26 Years in Procter & Gamble and Danaher."

Lean Implementation Track:


Karil Sampson – Director Of Process Improvement at Cuyahoga County, Ohio – "Matrix Influencing – For Lean Sustainability"

Healthcare Track:


Kevin Fleming – Sr. Continuous Improvement Advisor at Cleveland Clinic Florida – "The Cleveland Clinic Improvement Model: Engaged. Empowered. Expected."

Break (15 minutes)
9:45am

Session 2
10:00am

Lean Leadership Track


Nix Juban – Lean Strategy Leader Assembly Test Manufacturing at Intel Corporation – "The Power of Small Wins: Empowering the Frontline to Solve, Learn, and Deliver using Lean Learning Card."

Lean Implementation Track:


Mark Graban – Author of "The Mistakes that Make Us", Podcast Host, Consultant – "Why Don't People Speak Up? What Every Lean Leader Must Know"

Healthcare Track:


Isaac B. Mitchell – VP, Project Management and OpEx at Ballad Health – "Fall Down Seven, Get Up Eight My Top 3 Lessons Learned: Insights Gained From Two Decades of Experimenting With Lean"

Break (30 minutes)
11:00am

SUMMIT DAY 2

WEDNESDAY
SEPTEMBER 24TH

DAY 2 TOYOTA EXPERIENCE PASS SCHEDULE:

Buses Leave for Toyota
6:30am

Arrival and Continental Breakfast
7:30am

Welcome & Housekeeping
8:00am

This is Toyota (Presentation)
9:00am

Plant Tour
10:00am

DAY 2 FOUNDATIONAL IMPROVEMENT PASS SCHEDULE:

Breakfast
7:00am – 8:00am

Workshop Session 1
8:00am – 9:15am

Chartering to Win – Use Leadership Commitment to Set Your Teams Up for Success


Adam Lawrence – Author, Speaker, Lean Consultant at Process Improvement Partners

Workshop Session 2
9:35am – 10:50am

Value Stream Mapping – Visualize the Customer Journey to Drive Breakthroughs


Adam Lawrence – Author, Speaker, Lean Consultant at Process Improvement Partners

SUMMIT DAY 3

THURSDAY
SEPTEMBER 25TH

DAY 3 LEAN MANAGEMENT SCHEDULE:

Networking Breakfast
7:30am – 9:00am

Keynote Session 1
9:00am


Phil Wickler – Chief Transformation Officer of GE Aerospace – "FLIGHT DECK: A Lean Operating Model to Drive Operational, Financial and Customer Outcomes."

Networking Break
10:00am

Keynote Session 2
10:30am


Andrew Koenig – CEO of CITY Furniture – "CITY Furniture – Implement Lean Systems Thinking with Heart, A True Lean Transformation Story."

Lunch (Provided)

12:00pm

Afternoon Workshops

1:00pm

Setting Up Your Obeya Room – Part 2 -All-Day Workshop – Sam McPherson, Founder – Lean Leadership Academy

Connecting Continuous Improvement to the Bottom Line – Nick Katko, Author of "The Lean CFO" & Founder of BMA

Session 3

11:30am

Lean Leadership Track

Mohamed Saleh, Phd. – Director Lean North America at Benchmark -"Rewiring Your Operating System to Drive Meaningful Change."

Lean Implementation Track:

Jared Thatcher – Host of the Global Lean Summit – "Setting up Daily Management for the Office."

Healthcare Track:

Dr. Danna Qunibi – Chief Operational Excellence Officer at Children's Health – "Unlocking Hospital Capacity: Transforming Hospital Operations through Push to Pull Lean Redesign of Inpatient Flow."

Lunch (Provided) Lean Panel Discussion

12:30pm – **1:45pm**

Bus Leaves

Session 4

2:00pm

Lean Leadership Track

Michel Baudin – Engineer, Author, and Consultant at Takt Times Group – "When and How One-Piece Flow Enhances Quality."

Lean Implementation Track:

Adam Lawrence – Author, Speaker, Lean Consultant at Process Improvement Partners – "8D Problem Solving: Using a Structured Approach to Improve the Customer Experience."

Healthcare Track:

Chuck Russo – Retired Director Operational Excellence at IU Health South Region – "Our Journey to IU Health Bloomington at the Regional Academic Health Center: Day 1 and Beyond"

Break (30 minutes)

11:00am

Session 5

3:30pm

Lean Leadership Track

Hide Oba – 大庭英嗣 – Operations Management Consultant at H&M Operations Management LLC. – "Daily Management."

Lean Implementation Track:

Katie Votolato – Senior Lecturer, at Indiana University - "Operational Rhythm: Increasing Personal & Team Continuous Improvement Rhythm and Building Lean Culture"

Healthcare Track:

Tour of IU Health Bloomington Hospital

Break (15 minutes)

4:30pm

Evening Keynote Session

4:45pm

Sam McPherson – Founder of The Lean Leadership Academy – "Leading The Toyota Way: Good Results; Good Behaviors"

Lunch (Provided) / Toyota Panel Discussion with Q&A

11:30am

Divide into Tour Groups & Immersive Session

12:45pm

Final Q&A / Wrap-Up

3:00pm

Columbus Excursion Trip

3:30pm

Buses Leave

5:00pm

Arrive Back at Indiana University

Workshop Session 3

11:10am – 12:25pm

Trees Have More Than One Root – Root Cause Analysis

Karil Sampson – Director Of Process Improvement at Cuyahoga Co, Ohio

Lunch (Provided for registered attendees)

12:25pm

Workshop Session 4

2:20pm – 3:35pm

Facilitate Like a Ninja – Techniques to Engage, Empower, and Drive Ownership

Adam Lawrence – Author, Speaker, Lean Consultant at Process Improvement Partners

Workshop Session 5

3:55pm – 5:10pm

Sustainable Leadership – Drive Lasting Results with the Wheel of Sustainability

Adam Lawrence – Author, Speaker, Lean Consultant at Process Improvement Partners

Lunch & Panel Discussion

11:30am

Workshop Session

12:45pm – 2:30pm

Jared Thatcher – Summit Host – "Designing Your Organizational Lean Roadmap for Lasting Change"

Closing Remarks

2:40pm – 3:00pm

Global LEAN SUMMIT™

SUMMIT SCHEDULE
PRE-SUMMIT WORKSHOPS
MONDAY, SEPTEMBER 22nd

7:00AM REGISTRATION OPENS

8:30AM - 12:00PM AM WORKSHOPS

Dogwood Room:
Setting Up Your Obeya Room Pt. 1 (ALL-DAY WORKSHOP) - Sam McPherson (pg. 13)

Maple Room:
Foundational Lean 101: Continuous Cost Improvement - Jared Thatcher (pg. 19)

12:00PM - 1:00PM LEAN COFFEE LUNCH DISCUSSIONS

1:00PM - 4:30PM PM WORKSHOPS

Dogwood Room:
Setting Up Your Obeya Room Pt. 2 (ALL-DAY WORKSHOP) - Sam McPherson

Maple Room:
Connecting Continuous Improvement to the Bottom Line - Nick Katko (pg. 31)

5:30PM - 6:00PM SUMMIT OBEYA (Summit Staff)

Attendees are welcome to attend and observe

DAY 1 SCHEDULE

TUESDAY, SEPTEMBER 23rd

6:30AM REGISTRATION OPENS

7:00AM WELCOME BREAKFAST OPENS

7:30AM - 7:45AM MORNING STANDUP - Sponored by iObeya (Summit Staff)
Attendees are welcome to attend and observe

8:00AM - 8:30AM SUMMIT KICKOFF

Alumni Hall: Summit Kickoff - Jared Thatcher

8:30AM - 8:45AM BREAK
8:45AM - 9:45AM SESSION 1

Lean Leadership Track:
Execution is the Only Strategy Your Customers Ever See: Hoshin Kanri Lessons from 26 Years in Procter & Gamble and Danaher (Alumni Hall) - Olaf Boettger (pg. 45)

Lean Implementation Track:
Matrix Influencing – For Lean Sustainability (State Room East) - Karil Sampson (pg. 71)

Lean Health Care Track
The Cleveland Clinic Improvement Model: Engaged. Empowered. Expected. (Georgian Room) - Kevin Fleming (pg. 97)

9:45AM - 10:00AM BREAK
10:00AM - 11:00AM SESSION 2

Lean Leadership Track:
The Power of Small Wins: Empowering the Frontline to Solve, Learn, and Deliver using Lean Learning Card (Alumni Hall) - Nix Juban (pg. 51)

Lean Implementation Track:
Why Don't People Speak Up? What Every Lean Leader Must Know (State Room East) - Mark Graban (pg. 77)

Lean Health Care Track
Fall Down Seven, Get Up Eight - My Top 3 Lessons Learned: Insights Gained From Two Decades of Experimenting With Lean (Georgian Room) - Isaac B. Mitchell (pg. 105)

11:00AM - 11:30AM BREAK
11:30AM - 12:30PM SESSION 3

Lean Leadership Track:
Rewiring Your Operating System to Drive Meaningful Change (Alumni Hall) - Mohamed Saleh, Phd. (pg. 57)

Lean Implementation Track:
Setting up Daily Management for the Office (State Room East) - Jared Thatcher (pg. 81)

Lean Health Care Track
Unlocking Hospital Capacity: Transforming Hospital Operations through Push to Pull Lean Re-design of Inpatient Flow (Georgian Room) - Dr. Danna Qunibi (pg. 111)

DAY 1 SCHEDULE

12:30PM - 1:45PM LUNCH
12:45PM - 1:40PM LEAN PANEL DISCUSSION

Lean Panel Discussion: (pg. 127)
Jenny Spry
Laura Pullen-McMichael
Troy Tinsley

1:45PM BUSES LOAD FOR IU HEALTH TOUR
Lean Health Care Track
Travel to IU Health Bloomington Hospital for Lean Health Care Tour

1:45PM - 2:00PM BREAK

2:00PM - 3:00AM SESSION 4

Lean Leadership Track:
When and How One-Piece Flow Enhances Quality (Alumni Hall) - Michel Baudin (pg. 59)

Lean Implementation Track:
8D Problem Solving: Using a Structured Approach to Improve the Customer Experience (State Room East) - Adam Lawrence (pg. 87)

Lean Health Care Track
Our Journey to IU Health Bloomington at the Regional Academic Health Center: Day 1 and Beyond (IU Health Bloomington Hospital) - Chuck Russo (pg. 117)

3:00PM - 3:30PM BREAK
3:30PM - 4:30AM SESSION 5

Lean Leadership Track:
Daily Management (Alumni Hall) - Hide Oba – 大庭英嗣 (pg. 63)

Lean Implementation Track:
Operational Rhythm: Increasing Personal & Team Continuous Improvement Rhythm and Building Lean Culture (State Room East) - Katie Votolato (pg. 93)

Lean Health Care Track
Tour of the IU Health Bloomington Hospital (pg. 121)

4:30PM - 4:45PM BREAK
4:45PM - 5:30PM PM KEYNOTE

KEYNOTE: Leading The Toyota Way: Good Results; Good Behaviors (Alumni Hall)- Sam McPherson (pg. 129)

6:00PM - 6:15PM DAY 1 RETROSPECTIVE - Sponsored by iObeya (Summit Staff)
Attendees are welcome to attend and observe

6:30PM - 7:30PM OPTIONAL ACTIVITY:
Walking Limestone Tour of the IU Campus (Meet at Alumni Hall)

DAY 2 SCHEDULE
FOUNDATIONAL LEAN IMPROVEMENT PASS

WEDNESDAY, SEPTEMBER 24th

All Sessions in the Georgian Room

7:00AM - 7:45AM BREAKFAST

8:00AM - 9:15AM SESSION 1

Chartering to Win – Use Leadership Commitment to Set Your Teams Up for Success
- Adam Lawrence (pg. 147)

9:35AM - 10:50AM SESSION 2

Value Stream Mapping – Visualize the Customer Journey to Drive Breakthroughs
- Adam Lawrence (pg. 153)

11:10AM - 12:25PM SESSION 3

Trees Have More Than One Root – Root Cause Analysis
- Karil Sampson (pg. 157)

12:30PM - 2:20PM NETWORKING LUNCH

2:20PM - 3:35PM SESSION 4

Facilitate Like a Ninja – Techniques to Engage, Empower, and Drive Ownership
- Adam Lawrence (pg. 161)

3:35PM - 5:10PM SESSION 5

Sustainable Leadership – Drive Lasting Results with the Wheel of Sustainability
- Adam Lawrence (pg. 167)

DAY 2 SCHEDULE
TOYOTA MATERIAL HANDLING EXPERIENCE PASS

WEDNESDAY, SEPTEMBER 24th

6:15AM BUSES START BOARDING

6:30AM BUSES LEAVE (pg. 135)

7:30AM - 8:25AM ARRIVAL - CONTINENTAL BREAKFAST

8:30AM - 9:45AM WELCOME, PHOTOS, AND "THIS IS TOYOTA"

9:45AM - 10:00AM BREAK

10:00AM - 11:30AM PLANT TOUR

11:30AM - 1:00PM LUNCH Q&A WITH TOYOTA TEAM

1:00PM - 2:30PM SESSIONS

2:30PM - 2:45PM BREAK

2:45PM - 3:15PM FINAL Q&A AND WRAP UP

3:15PM - 3:30PM LOAD BUSES AND DRIVE TO COLUMBUS

3:30PM - 5:00PM COLUMBUS EXCURSION TRIP

Architectural Tour & Lean Comparison to Toyota's Woven City
Ice Cream Social - Sponsored by **KaiNexus**

5:00PM - BUSES DEPART FOR INDIANA UNIVERSITY

DAY 3 SCHEDULE

THURSDAY, SEPTEMBER 25th

7:30AM - 9:00AM NETWORKING BREAKFAST & LEAN COFFEE DISCUSSIONS

8:30AM - 8:45AM MORNING STANDUP - Sponsored by iObeya
Attendees are welcome to attend and observe

9:00AM - 10:00AM KEYNOTE SESSION 1

FLIGHT DECK: A Lean Operating Model to Drive Operational, Financial & Customer Outcomes - Phil Wickler (pg. 173)

10:00AM - 10:30AM BREAK
10:30AM - 11:30AM KEYNOTE SESSION 2

CITY Furniture – Implement Lean Systems Thinking with Heart, A True Lean Transformation Story - Andrew Koenig (pg. 179)

11:30AM - 12:45PM LUNCH
11:45AM - 12:30PM LEAN PANEL DISCUSSION

Lean Panel Discussion: (pg. 185)
Adrian Singleton
Antonio DePaolo PhD
Christopher Carpentier

12:45PM - 2:30PM SESSION 3 - WORKSHOP

WORKSHOP: Designing Your Organizational Lean Roadmap for Lasting Change
Jared Thatcher (pg. 189)

2:30PM - 2:40PM BREAK
2:40PM - 3:00PM SUMMIT CLOSING CEREMONY
Jared Thatcher

AFTER SUMMIT
4:00PM - 4:15PM SUMMIT RETROSPECTIVE (SUMMIT STAFF)
Attendees are welcome to attend and observe

SUMMIT PHRASEOLOGY

To make the summit an exceptional experience we want to maximize our time and efficiency. Please review this list and come prepared to use these phrases and actions at the summit:

WALK & TALK

We want you to take advantage of the networking opportunities and learn from one another, but we also want to be respectful of the other attendees and the speakers and be in our seats on time. Use this phrase a few minutes before the scheduled start time and take your in-place conversations into a WALK-AND-TALK conclusion making your way to your seats.

GOLDEN NUGGET

This refers to the card in your welcome packet. Whenever you hear something in a session that adds value to you, gives you an idea, or you learn a new thing, hold up your GOLDEN NUGGET Card in the air for a few seconds. This will help you actively be engaged in the sessions as you listen for those things that will help you and inspire others to pay attention and give instant feedback to the speakers about what you value.

ANDON-PULL

This serves the purpose of getting the attention and silence of everyone in the room. When the speaker or staff member gives the ANDON-PULL signal, please raise your hand and also give the signal (raise your hand in the air, grab the invisible andon cord, and pull it down), stop your conversation, and give your attention to the speaker.

I'M STUCK

We want to create a safe place to learn, this starts with getting everyone to NOT BE AFRAID TO SEE RED! When you hear something you don't understand, hold up your I'M STUCK card (It's red for a reason). This helps the speaker recognize there is something they need to clarify. This is our version of pulling the Andon cord. It helps you and others (they most likely have the same question you have).

SUMMIT BOARDS

WE PRACTICE WHAT WE PREACH

There are several Summit Boards that we will be using to make this a productive and rewarding event. To gain the most out of this summit, actively participate in using the following boards and cards.

01. As you think of something you would like to get from the Summit, put your SUMMIT WISH CARD on the Summit Future State Board

01

SUMMIT FUTURE STATE BOARD

We want to know what you wish to get out of the Summit. For the speakers and staff to know how to best serve you, understanding the Voice of the Customer is critical. At the start of Day 1, please complete at least one SUMMIT WISH CARD. This will give us insights into how to improve in real-time, and what we can do better next time. Continue to share improvement ideas on this board throughout the week and add a completion sticker as your wish is granted!

02. If there is a problem you are trying to solve, put your OPPORTUNITY (CHALLENGE) CARD up on the Request Board, or add a SEE ME CARD if you can help someone.

02

REQUEST BOARD

This is a place to share the opportunities (challenges) you are facing at work. This board is not just for the speakers and staff to review so we can help you find solutions, but it is an opportunity for you to share your knowledge and experience with your fellow attendees that are seeking help. Complete a *SEE ME CARD* and attach it to the back of their card. Check back often. Help each other.

03. If you have a breakthrough success. If you learned something that will help you. If you thought of a solution. Use the SUCCESS STORY CARD and share it with everyone.

03

SUCCESS STORY BOARD

When your Opportunity (Challenge) is resolved or a remediation is put in place – Celebrate! We want to hear about what positive impacts this summit is having on your work. Did you think of an idea to implement during a session? Share it! Did you get help removing a roadblock? Announce it! This is all about you. We want to capture the Value-Added experiences, ideas, and insights you are getting from the Summit. We want others to learn and gain from those success too. Please share even the littlest success. You never know when that success might be the one thing to help someone else too.

04. You are welcome to attend and observe our frequent stand-ups at the Summit iObeya Board. This is an opportunity for us to quickly respond to make this summit better for you.

04

SUMMIT VIRTUAL iOBEYA BOARD

We will be conducting stand-ups several times during the Summit (see the schedule for times). You are welcome to join us and observe. This is the heart of our Lean Summit, to quickly adjust in real-time based on attendee feedback from each session (please take the time to scan the QR code and complete each survey imediately after the session). As issues arise, we pull the figurative Andon Cord and take corrective action immediately. Our KPI dashboard helps us see if we are reaching our targets to better serve you, our customers.

NOTES:

Setting Up Your Obeya Room

VoC Session Survey

Sam MCPHERSON

Founder - Lean Leadership Academy

Email:
Sam@theleanleadershipacademy.com

LinkedIn:
sammacpherson

Speaker Bio:

Sam McPherson is the founder and president of The Lean Leadership Academy and a Toyota Lean Management System Faculty Fellow for Toyota Material Handling. Additionally, he is an internationally recognized Lean Enterprise Transformation and Leadership Development Expert and is known as "Mr. Obeya" for his knowledge of setting up and operating Obeya rooms. Sam was trained in the Toyota Production System in the early 90's, as a Toyota Scholar Management Intern at TMMK-Powertrain and Engine Assemblvy, TEMA, NAPSC by Toyota's elite Operations Management Development Division and the Toyota Institute in Japan. Today, Sam still works closely with Toyota leaders past and present. In 2017, Sam was named a Shingo Institute Faculty Fellow and is a member of the Lean in Higher Education Steering Committee and POMS.

Session Summary:

Throughout their development and leadership roles, Toyota leaders develop practices that help them live out the Toyota Way of Leadership, and the Obeya room is a key to the organizational heartbeat of their Lean Management System. Join us for this all-day workshop to understand the fundamentals about how to set up and run your own Obeya room.

Key Takeaways:

- How to Set-up and start a Daily Management Obeya
- Leading and Daily Management at Toyota
- Introduction to Toyota's Visualized Management System (The Obeya System)
- Overview of Toyota's Management System Philosophy
- Toyota Daily Management Problem-Solving and Problem-Solving Management

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

Do not make the mistake of dedicating a wall to "PLAN"; a wall to "DO"; a wall to "CHECK"; a wall to "ACT"

Start with the Schedule

Don't just check in the morning, do a mid-day and end of day check

MAKE PROBLEMS VISIBLE

Setting Up Your Obeya:

WHAT IS AN OBEYA ROOM?

Obeya in Japanese means: _____ _____

THE SPIRIT OF OBEYA

1. C_____: Hoshin Direction, Purpose, and Connection at ALL Levels

2. C_____: All things Visual: Proper Problem Awareness

3. C_____: Priorities and Change Point Management

4. C_____: What happens after the Obeya Meetings?

5. C_____: Values, Principles, Attitude, Drive, and Dedication

6. C_____: Use the Obeya to Develop Leaders

7. C_____: Every time we meet in the Obeya we Promote our Culture

8. C_____: The Obeya is a Social Platform

Obeya and Leadership and the Kaizen Mindset

"Having proper awareness of problems and an extremely low lolerance for the current condition is a proper attitude"

- Isao Kato: Father of Standardized Work &
Toyota's Supervisor Leadership Development Program

Abnormality Management
is
Problem Solving Management

Strategic Pillars:

Toyota Leadership Kata

4 Elements to Leadership Routine

- Cast the Vision
- Communicating the Vision
- Influencing the Transformation
- Manage & Leading the Transformation

Types of Obeya & Schedules:

Global Obeya

- When developing a new vehicle, managers responsible for decision making in design, production engineering, and manufacturing, gather in on place to shorten lead-time through real-time communications and simultaineous engineering.

Business Process Layout Obeya

- Daily management target setting, trend analysis, priority setting and action planning, status review.

Focus Obeya

- Floor management and Development
- Team Problem Solving
- Jishuken (Management Study Group)
- Department Hoshin

Toyota Daily Management Obeya aka. “The Adrenaline Room”
Daily Schedule:

7:00 AM How’s Your Process
7:30 AM “The Adrenaline Meeting”
4M Hot Start & Change Management

- Safety
- Quality
- Productivity
- Level Manning
- Top 5 Priorities
- Urgent Customer Requirements
- Challenges
- Top Management Problems TODAY
- Support Needed by Leaders

10:40 AM Progress Huddle
1:30 PM Schedule Attainment and PDCA Review
End of Day: SQD Operation Impreatives & 8 Step Problem Solving Report-out (by Step)

NOTES:

NOTES:

Answer Key: (pg. 14)

Big Room
Clarity; Comprehension; Communication; Collaboration; Calibration; Capability; Culture; Community

PRE-SUMMIT WORKSHOP

Foundational Lean 101: Continuous Cost Improvement

VoC Session Survey

Jared Thatcher

Host of the Global Lean Summit

Email: **thatcher.jared@globalleansummit.com**

Website: **www.globalleansummit.com**

LinkedIn: **jaredthatcher**

Speaker Bio:

Jared Thatcher is the host of the Virtual and Global Lean Summits. He has consulted with companies like Daimler Trucks, Alaska Airlines, Nike, Mercy Corps, and many others to implement Lean & Agile into their organizations, helping contribute in excess of over $1 billion in cost savings and new revenue generation. Jared is a sought after speaker and keynote speaker at conferences & corporate events, and consults with firms to implement Lean into their organizations.

Session Summary:

Where is your money hiding—and how much of it is slipping through the cracks? In this energizing and practical workshop, you'll learn how to see what others overlook. Using Lean principles and drawing on first-hand knowledge on how to structure a Continuous Cost Improvement (CCI) model and program, that helped a major manufacturer over 3 years achieve over a billion in savings. By simply changing how teams think, work, and solve problems, you'll gain hands-on experience with proven tools to uncover and eliminate cost drivers, and walk away ready to lead smarter, faster, and more sustainable improvements in your own organization. You'll learn how a simple, repeatable approach to CCI can unlock savings in any industry. This isn't theory—it's a blueprint for identifying value, eliminating waste, and capturing opportunity. You'll leave equipped with practical Lean tools and the confidence to start your own improvement journey.

Key Takeaways:

- A practical understanding of how Lean drives cost savings
- Real-world inspiration from a high-impact CCI program
- Why it's essential to align goals across the organization to maximize cost savings
- A simple framework to start your own CCI journey
- Gain the confidence in finding "hidden money" without harming people or performance

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

Use Lean Thinking to improve value, eliminate waste, and directly impact the bottom line.

Align cross-functional silos goals (Hoshin Kanri) to not compete with one another.

Balance cost savings initiatives with the long-term view.

Beware: Sort-term gains can sometimes negatively impact long-term growth.

A CASE STUDY (Part 1):
Lean Thinking in Uncertain Times - Developing a Playbook for Cost Savings

Setting: North America — PART 1 - Q1 2012 (Kick-off of New Cost Improvement Program) & PART 2 - The Preparation for the Next Wave in 2015

Company Snapshot:
Acme Manufacturing (a fictitious company) is the number one manufacturer of their product in North American with a multi-brand portfolio, a large dealer/service network, and manufacturing plants located in the U.S and Mexico, with its headquarters in the US.

Manufacturing footprint: 3 U.S. manufacturing plants and 2 Mexico manufacturing plants with one newly built.

Lean context: Lean had been practiced for a long time on the factory floor at Acme. While training was available for the indirect or office functions, it was not part of the culture at the start of 2012.

Situation / Trigger:
Two recessions over the past decade (2000–01 and 2007–09) exposed how vulnerable profit margins and production volume are to economic factors. After a successful three-year Repositioning program (2009–2011) that delivered hundreds of millions in savings and stabilized the business, leadership launched Hurdles to Opportunity (R2O, 2012–2014), a three-year program to embed *Lean Thinking* and continuous cost improvement (CCI) across the organization.

The H2O program was run through a central project management office (PMO) with two clear tracks: ***Core*** — short-term, P&L-impact work across the business; and ***Enablers***—longer-horizon benefits that strengthen products, processes, and customer value with the thought that over time these initiatives would develop direct financial and goodwill impacts to strengthen the Core.

Decision Maker & Governance:
The CEO and the Operational Leadership Team (OLT) set the strartegic direction for the company; a PMO Director oversees the H2O program with each sub-program having an OLT executive sponsor.

First Decision (Q1 2012):
If you're the CEO or a member of the OLT, where would you recommend looking for the *Core* improvement and cost-savings first? What *Enabler* Initiatives would you have H2O focus on? (Consider the full enterprise: U.S. plants, the new Mexico plant, suppliers, subsidiaries, dealership network, and all office (indirect) functions, and of course the customers)

What Would Be The *Core* Functions (Short-Term Financial Impact) You Would Focus On?

_____

_____

_____

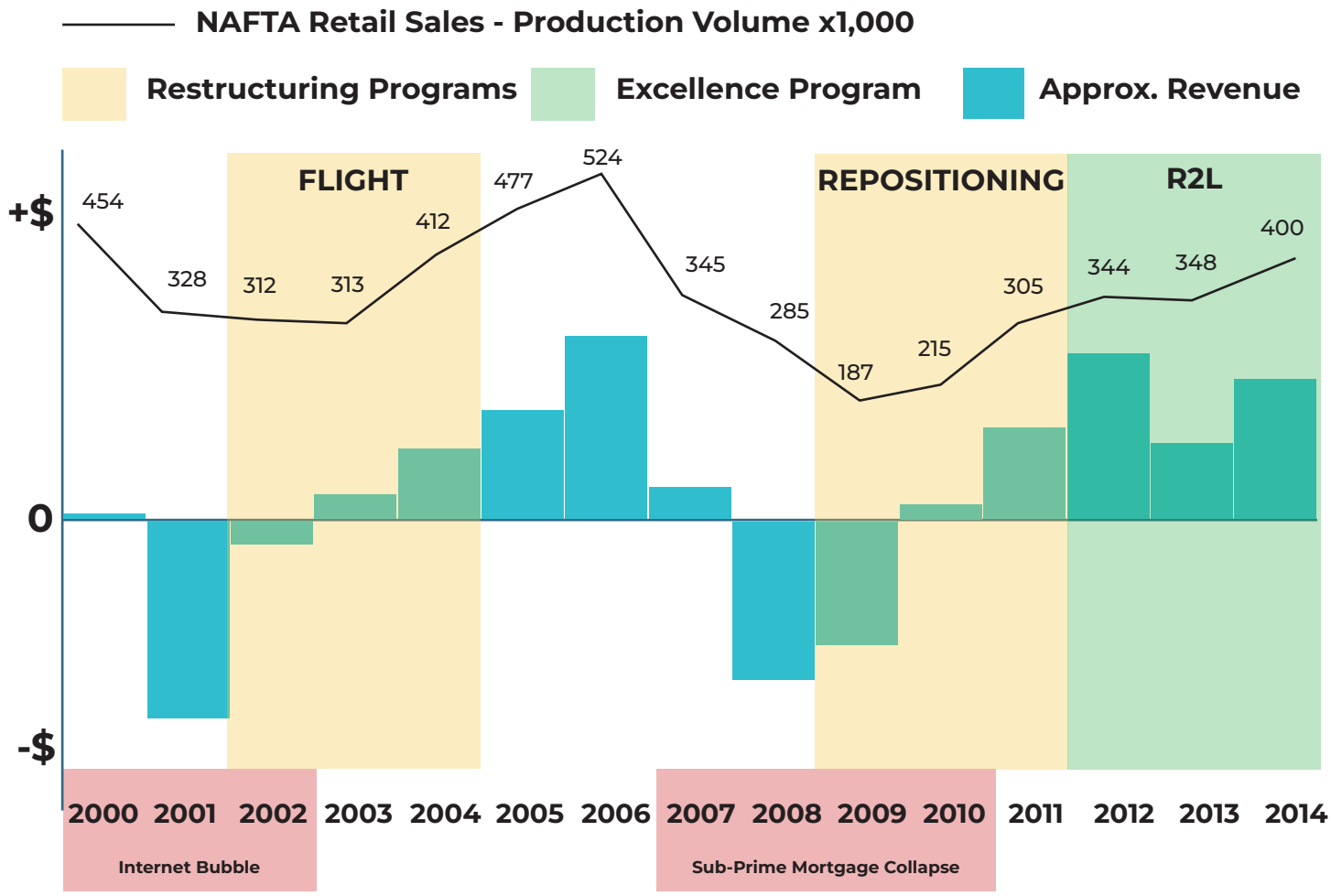
What Would Be Your *Enabler* Functions (Long-Horizon Benefit Levers) You Would Pursue?

_____

_____

_____

Balancing Economic Fluctuation with Improvement



NOTES:

Workstream Structure

COST SAVINGS PROGRAM

CORE
(Short-Term Financial Impact)

- Sales / Marketing
- CCI (Continuous Cost Improvement)
- IIP (Indirect Intensification Program - Office Lean)
- Logistics
- Operations & Quality Management
- Aftermarket
- Pricing Strategy

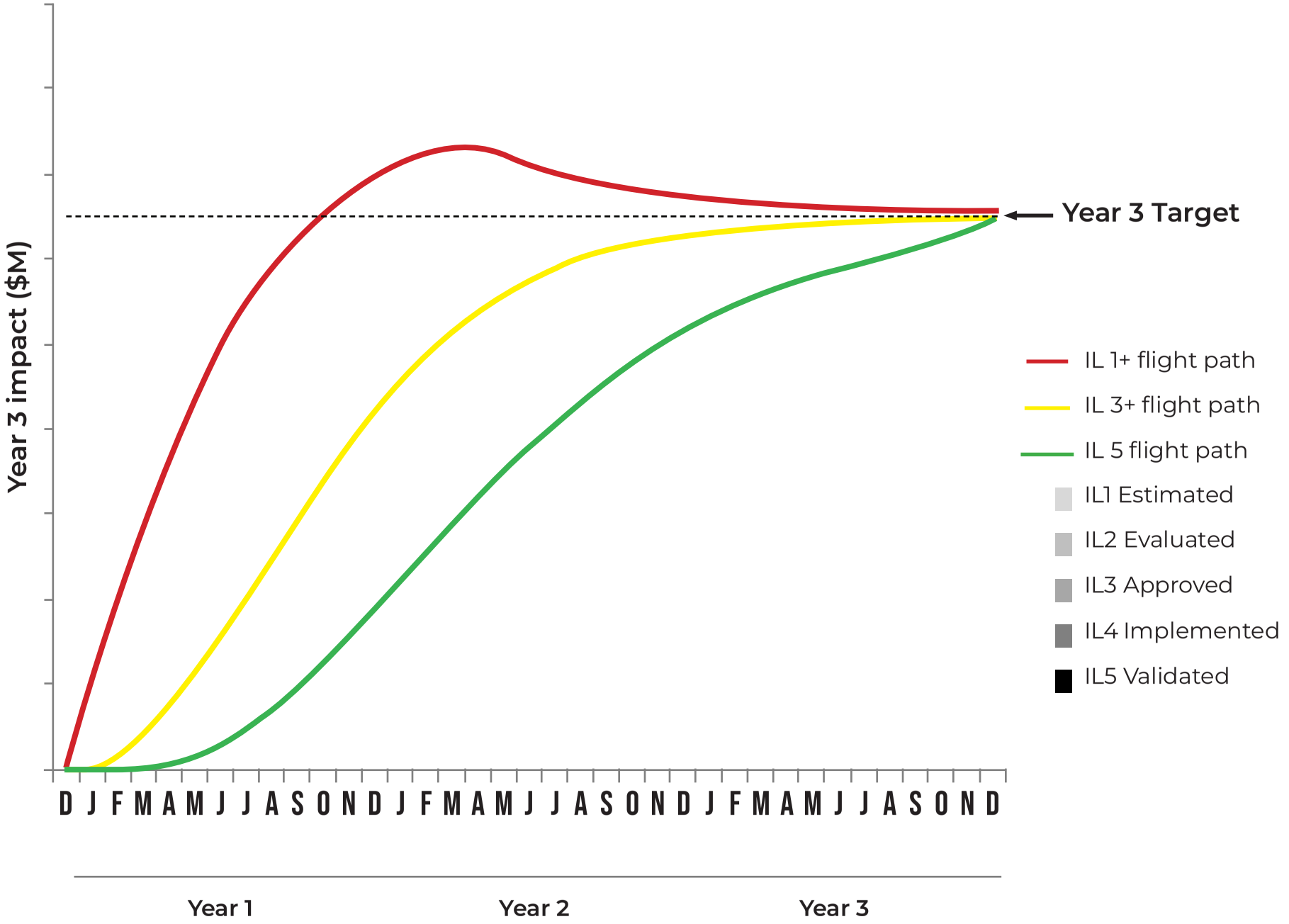
ENABLERS
(Long-Horizon Benefit Levers)

- Reduce Product / Parts Complexity
- TOC (Total Cost of Ownership)
- Distribution Network Improvements
- Employee Benefits
- Reduce Production Complexity
- Readiness to Build
- Ease of Doing Business
- Talent Management

Gate System for Validating Improvement Ideas

IL0 Ideated	IL1 Estimated	IL2 Evaluated	IL3 Approved	IL4 Implemented	IL5 Validated
Improvement Idea is captured in the system, and an analyst is assigned to validate the idea	Business Case viability is looked at and an initial cost estimation of savings is determined	Business Case completed with cross-functional inputs captured and project plan developed	Business Case is approved, and resources can be assigned to implement it	The Initiative has been successfully implemented	Finance reviews the Business Case and the actual implementation, and validates actual savings

Flight Path 3-Year Ramp-Up Curve Template



CCI WORKSHOPS:

Go to the GEMBA (Plants)

Collaborate with Suppliers

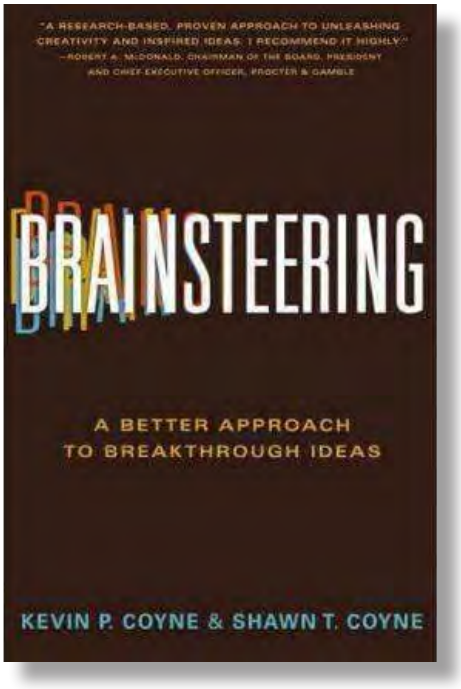
VoC with Customers

Competitor Product Benchmarking

Company-Wide CI Day

BRAINSTEERING

Brainsteering orients and focuses us by asking the “right” questions. It takes all the creative energy normally associated with traditional brainstorming and “Steering” it in a more productive direction, better leveraging the way human beings actually think and work in creative problem-solving situations. It helps you look at things from an entirely different perspective. Best of all, it will help you develop ideas you previously could never have imagined.



PRE-SUMMIT WORKSHOP

IDEA FORM TEMPLATE

Team: *Idea #:*

Title:

Idea Description:

Photo:

Impact:

Questions / Comments:

Next Steps:

Category / Priority:

BUSINESS CASE PARTS IMPROVEMENT TEMPLATE:

Global LEAN SUMMIT

CCI Title:

CCI Tracking No.:

CCI Description:

Department:

Seeking Approval: L3

Main Contact:
Business Case Analyst:
Target L4 Date:
Focus Area(s):

Business Case:

Engineering Hours:		$ per Unit Savings:	$
Other Hours		Volumes Impacted:	
Total Labor Costs:	$	Annual Savings:	$
Tooling Investment:	$	Savings per Day:	$
Other Costs:	$	Payback:	yrs
Total Investment:	$		

Risks / Opportunities:

Risks Identified:

Product Impact:	Y/N
Product Cost Increase:	Y/N
Supplier Change:	Y/N
Marketing Impact:	Y/N
Other Impact(s):	Y/N

Cross-Functional Input:

Department		Input Obtained
Sales:	☐	
Marketing:	☐	
Purchasing:	☐	
Engineering:	☐	
Operations:	☐	
Quality:	☐	
Logistics:	☐	
Regulatory/Legal:	☐	
Supplier(s):	☐	
Other:	☐	

A CASE STUDY (Part 2):
Lean Thinking in Uncertain Times - Developing a Playbook for Cost Savings

Cost Improvement Program Architecture:

A project management office (PMO) was set up to manage the cost improvement program called, "Hurdles to Opportunity" (H2O). Members of the Operational Leadership Team sponsored workstreams. Within the workstreams PMO managers were responsible for running idea generation workshops, validating ideas, and then establishing project plans to implement approved ideas. These projects worked cross-functionally with various departments as well as working with suppliers to sucessfully implement the cost savings or revenue generating ideas.

What Happened:

The H2O program was so successful that they realized they were going to hit the three-year goal before the end of the second year. A stretch target goal was established for the final year adding an additional $250M in savings. The program met the higher bar and finished >10% above the stretched target.

While the efforts of the H2O program played a significant role in reaching this target, there was another factor that worked to their advantage, a competitor failed to meet government regulation standards and was forced to suspend production in order to be in compliance. When this competitor halted production, market share of Acme Manufacturing went from 31.9% in 2011 to 39.1% by 2015, which significantly increased the expected revenue, greatly helping the numbers look successful.

What's Next:

The realization that the company can wait for economic downturns to respond or they could continue the efforts from these improvements and make this a part of their culture. It was determined that the program would continue to advance the organization forward, but what would be the focus of the next three-year improvement wave?

Second decision (Preparation for the 2015 next wave):

You've outperformed over three years. Which option would you focus on next?

Option A — Double-down: Continue the Core (Short-Term Financial Impact) and the Enablers (Long-Term Benefits) playbook with higher throughput, continuing to look for cost improvements.

Option B — Digital & Innovation: Connect IT to product services, develop predictive uptime and a modern digital workplace for Sales/Marketing, looking for ways to be the leader in market innovation.

Option C — Total Cost of Ownership Value Expansion: TCO-based pricing, to bring down the cost for customers, improve network and logistics redesign, increase aftermarket uptime focus, and decrease warranty claims, to lead the industry in ownership cost value.

What would you have the next wave focus on?

_____

_____

_____

_____

_____

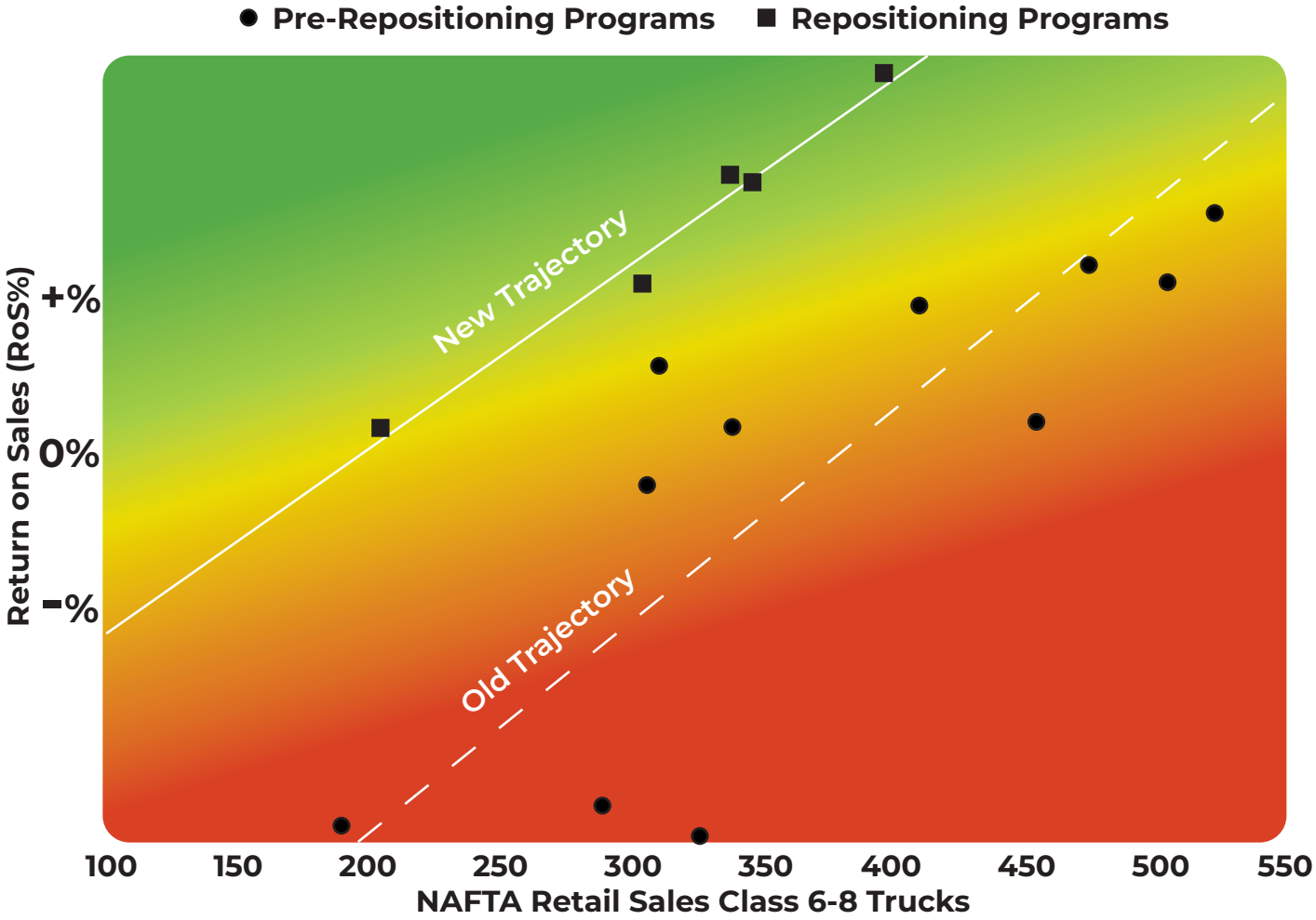
Workstreams 2.0 Focus

BUSINESS INNOVATION

CORE (Short-Term Financial Impact)	CUSTOMER (Total Cost of Ownership)	CULTURE (Long-Horizon Benefit Levers)
Digital Excellence	Quality First	IIP (Indirect Intensification Program - Office Lean)
CCI Continuous Cost Improvement	Service Evolution	Leadership & Culture
Operational Excellence	Dealer Sales Performance	Mexico

Creating a culture where cooperation and innovation is the standard

Impact of Cost Savings Programs on RoS



NOTES:

NOTES:

Connecting Continuous Improvement to the Bottom Line

VoC Session Survey

Nick KATKO

Author of "the Lean CFO"
Founder of BMA

Email: **nkatko@maskell.com**

Phone: **859-608-0683**

LinkedIn: **nickkatko**

Speaker Bio:

Nick serves as the President and owner of BMA. With over three decades of expertise, he has utilized his knowledge in lean accounting to aid companies in designing, leading, and coaching them through their lean accounting transformations. Nick's experience spans globally, working with a diversity of companies ranging from family-owned businesses to multinational corporations across various sectors such as manufacturing, healthcare, software, engineering, and services. Additionally, Nick has delivered presentations on lean accounting at numerous lean conferences across the United States, Europe, Asia, and Australia.

Session Summary:

In this interactive workshop you will learn how to use the Lean Accounting Box Score to connect continuous improvement to the bottom line.

Key Takeaways:

- The principles, practices and tools of a lean management accounting system
- The economics of lean
- The 6 possible ways continuous improvement can impact financial performance
- How to build a value stream box score
- How to connect continuous improvement to the bottom line through a series of Excel-based box score exercises which will require you to make some business decisions

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

Use the right measurement systems

Integrate accounting into continuous improvement

Connect continuous improvement to the bottom line

Analysis & Decision Making System Assessment

	Current State			Future State		
	Method of Analysis	Who performs analysis?	Who makes the decision?	Method of Analysis	Who performs analysis?	Who makes the decision?
Lean & Continuous Improvement						
Quantifying the financial impact of C.I. events						
Quantifying theoperational impact of C.I. events						
Linking operational improvement to financial improvement						
Projecting the financial impact of a future state value stream map						
Make or buy decisions						
Measuring impact of lean practices						
Analysis & Decision Making						
Analyzing labor efficiency/productivity						
Analyzing labor cost						
Analyzing machine efficiency/productivity						
Analyzing machine cost						
Analyzing material usage/efficiency						
Analyzing material cost						
Cell operating performance						
Cell financial performance						
Value stream operating performance						
Value stream financial performance						
Plant operating performance						
Plant financial performance						
Product or service cost						
Product or service profitability						
Profitability of quotes & orders						
Hiring people						
CAPEX purchases						
Make-buy decisions						
New product cost and profitability						

NOTES:

Lean Performance Measurement System Assessment

Use this assessment to evaluate your Lean Performance Measurement System. It can be used to understand the current state and measure achieving the future state.

1. Principles and Practices	Not in place	Working on it	Completed
Performance measurements have been aligned to the company's lean strategy	☐	☐	☐
Teams self-report and self-monitor their performance measurements	☐	☐	☐
Performance measurements are integrated into PDCA practices	☐	☐	☐
Performance measurements align strategy to actions throughout the company	☐	☐	☐
Performance measurements have been developed in a cross-functional collaborative fashion	☐	☐	☐
2. Daily Cell Lean Performance Measurements	**Not in place**	**Working on it**	**Completed**
A. Daily measurements have been created to measure cell stability and control in:			
Delivery	☐	☐	☐
Quality	☐	☐	☐
Lead Time	☐	☐	☐
Flow	☐	☐	☐
Productivity	☐	☐	☐
Cost	☐	☐	☐
Safety	☐	☐	☐
Respect for people	☐	☐	☐
B. Each measurement's reporting cadence is set to identify abnormal conditions based on cell processing times:			
Day by the day	☐	☐	☐
Day by the hour	☐	☐	☐
Week by the week	☐	☐	☐
Week by the day	☐	☐	☐
C. Standard work has been created for each performance measurement (see below)			
D. Measurements are posted visually on cell performance boards	☐	☐	☐
E. Measurements are reviewed in daily huddles	☐	☐	☐
F. Measurements are used to identify performance problems & issues	☐	☐	☐
G. Measurements drive cell-based "just-do-it" improvements or countermeasures	☐	☐	☐

3. Value Stream Lean Performance Measurements	Not in place	Working on it	Completed
A. Value Stream measurements have been created to measure improvement over time in:			
Delivery	☐	☐	☐
Quality	☐	☐	☐
Lead Time	☐	☐	☐
Flow	☐	☐	☐
Productivity	☐	☐	☐
Cost	☐	☐	☐
Safety	☐	☐	☐
Respect for people	☐	☐	☐
B. Standard work has been created for each performance measurement (see below)			
C. Time-based improvement targets have been established for each measurement	☐	☐	☐
D. Each measurement's reporting cadence is based upon both the operating and continuous improvement cycles:			
Weekly	☐	☐	☐
Monthly	☐	☐	☐
E. Measurements are posted visually on value stream performance boards	☐	☐	☐
F. Measurements are reviewed in weekly or monthly team meetings	☐	☐	☐
G. Measurements are used to identify performance problems & issues	☐	☐	☐
H. Value stream measurements are used in value stream mapping events	☐	☐	☐
I. Value stream measurements are used in continuous improvement events	☐	☐	☐
J. Value stream measurements are used to identify improvement opportunities	☐	☐	☒

4. Company Lean Performance Measurements	Not in place	Working on it	Completed
A. Company performance measurements have been created to measure improvement over time in:			
Delivery	☐	☐	☐
Quality	☐	☐	☐
Lead Time	☐	☐	☐
Flow	☐	☐	☐
Productivity	☐	☐	☐
Cost	☐	☐	☐
Safety	☐	☐	☐

Respect for people	☐	☐	☐
B. Standard work has been created for each performance measurement (see below)			
C. Time-based improvement targets have been established for each measurement	☐	☐	☐
D. Measurements are posted visually	☐	☐	☐
E. Measurements are used in annual strategy deployment	☐	☐	☐
F. Measurements are used to evaluate the progress towards the annual improvement objectives	☐	☐	☐
5. Lean Performance Measurement Standard Work	**Not in place**	**Working on it**	**Completed**
For every lean performance measurement, the following standard work exists:	☐	☐	☐
Formula or equation	☐	☐	☐
Source of the data to calculate the measurement	☐	☐	☐
Visual presentation format (number, graph, etc.)	☐	☐	☐
Person/people responsible for collecting the data	☐	☐	☐
Person/people responsibility for reporting the measure	☐	☐	☐
Person/team accountable for improving the measurement	☐	☐	☐

CAPACITY ANALYSIS FOR VALUE STREAM: Enter name here

TOTAL CAPACITY PER MONTH	DATA SOURCE	DATE LAST UPDATED	Process step name	Process step name	Process step name	
Resource performing work						
Number of Resources						
Shift Hrs						
Number of Shifts						
Lunch & Break Time (mins)						
Days in the Month						Value Stream Tota
Total Capacity (Minutes)						

PRODUCTIVE CAPACITY			Process step name	Process step name	Process step name	
Number of Units Shipped						
Number of Units Produced						
Cycle Time per Unit						Value Stream Tota
Total Productive Time						
PRODUCTIVE %						

NON-PRODUCTIVE CAPACITY			Process step name	Process step name	Process step name	
Batch Size						
Total Parts Made						
Number of Change Over						
Change Over Time						Value Stream Tota
Total Changeover time						
Quantity Overproduced						
Cycle Time per Unit						Value Stream Tota
Overproduction Time						
Scrap & Rework %						
Scrap& Rework Qty						Value Stream Tota
Time on scrap & rework						
% Items Inspected						
Total Parts Made						
Inspect Time						Value Stream Tota
Total Inspection time						
Downtime Percentage						
Total Capacity						Value Stream Tota
Total Downtime						
# People for 5S						
5S Time Mins per day						Value Stream Tota
Total 5-S time						
# People for Huddle						
Daily Huddle time in minutes						Value Stream Tota
Total Huddle Time						
# of people in the cell						
Other non-productive, necessary time per day						Value Stream Tota
Total Other NP-N time						
TOTAL NON-PRODUCTIVE, NECESSARY TIME						
TOTAL NON-PRODUCTIVE TIME						
NON-PRODUCTIVE %						

Continuous Improvement Time			Process step name	Process step name	Process step name	
# people						
Total hours per person per month						Value Stream Tota
CI Time						
CI Time Capacity %						
AVAILABLE CAPACITY						%

CAPACITY ANALYSIS FOR VALUE STREAM: **COMPLETED EXAMPLE**

TOTAL CAPACITY PER MONTH	Fabrication	Machining	Anodizing & Assembly	
Resource performing work	Machines	Machines	People	
Number of Resources	8	5	6	
Shift Hrs	9	9	9	
Number of Shifts	1	1	1	
Lunch & Break Time (mins)	60	60	60	
Days in the Month	20	20	20	**Value Stream Total**
Total Capacity (Minutes)	76,800	48,000	57,600	182,400

PRODUCTIVE CAPACITY	Fabrication	Machining	Anodizing & Assembly	
Number of Units Shipped	8000	8000	2000	
Number of Units Produced	8000	8000	2000	
Cycle Time per Unit	3	3	5	**Value Stream Total**
Total Productive Time	24,000	24,000	10,000	58,000
PRODUCTIVE %	31.25%	50.00%	17.36%	31.80%

NON-PRODUCTIVE CAPACITY	Fabrication	Machining	Anodizing & Assembly	
Batch Size	30	10	2	
Total Parts Made	10000	10000	3333	
Number of Change Over	333	1000	1667	
Change Over Time	40	3	5	**Value Stream Total**
Total Changeover time	13,333	3,000	8,333	24,667
Quantity Overproduced	0	0	0	
Cycle Time per Unit	3	3	5	**Value Stream Total**
Overproduction Time	0	0	0	-
Scrap & Rework %	20%	20%	40%	
Scrap& Rework Qty	2000	2000	1333	**Value Stream Total**
Time on scrap & rework	6,000	6,000	6,667	18,667
% Items Inspected	25%	25%	100%	
Total Parts Made	10000	10000	3333	
Inspect Time	1	0.5	6	**Value Stream Total**
Total Inspection time	2500	1250	20000	23,750
Downtime Percentage	10%	10%	10%	
Total Capacity	76,800	48,000	57,600	**Value Stream Total**
Total Downtime	7,680	4,800	5,760	18,240
# People for 5S	11	6	6	
5S Time Mins per day	10	10	10	**Value Stream Total**
Total 5-S time	2200	1200	1200	4,600
# People for Huddle	11	6	6	
Daily Huddle time in minutes	5	5	5	**Value Stream Total**
Total Huddle Time	1100	600	600	2,300
# of People in the cell	11	6	6	
Other non-productive, necessary time per day	20	20	20	**Value Stream Total**
Total Other NP-N time	4400	2400	2400	9,200
TOTAL NON-PRODUCTIVE, NECESSARY TIME	7,700	4,200	4,200	16,100
TOTAL NON-PRODUCTIVE TIME	37,213	19,250	44,960	101,423
NON-PRODUCTIVE %	48.45%	40.10%	78.06%	55.60%

Continuous Improvement Time	Fabrication	Fabrication	Fabrication	
# people	11	6	6	
Total hours per person per month	8	8	8	**Value Stream Total**
CI Time	5,280	2,880	2,880	11,040
CI Time Capacity %	6.88%	6.00%	5.00%	6.05%
AVAILABLE CAPACITY	13.42%	3.90%	-0.42%	6.54%

Value Stream Income Statement Checklist

Value Stream Sales and Contribution Margin	Data Source	Completed
Actual sales for the value stream		☐
Actual material/variable costs: issued, purchased or consumed		☐
Calculate the contribution margin		☐
		☐

Value Stream Direct Costs	Data Source	Completed
Labor – people assigned full-time to value stream		☐
Machines – depreciation, tooling, repairs & maintenance, utilities**		☐
Other – any other cost direct to the value stream (list):		☐
		☐

Production Monument - Shared Costs	Data Source	Completed
Actual material cost: issued, purchased or consumed		☐
Labor – people assigned full-time to the process step		☐
Machines – depreciation, tooling, repairs & maintenance, utilities**		☐
Other – any other cost direct to the process step (list):		☐
Method to assign production monument costs has been determined (e.g. % units by VS)		☐
		☐

Facility - Shared Costs	Data Source	Completed
Actual facility costs:		☐
Depreciation		☐
Maintenance & repair		☐
Rent or interest		☐
Utilities		☐
Other:		☐
Method to assign facility costs has been determined (e.g. % VS space)		☐

Operational Support – Shared Costs	Data Source	Completed
Operational support functions identified		☐
Relationship between support labor and value stream work has been studied		☐
Method to assign support labor has been developed		☐

		☐
Value Stream P&L Design	**Data Source**	**Completed**
"Plain English", simplified P&L format has been designed for value streams		☐
Company-wide P&L in value stream format has been designed		☐
		☐
Company-Wide Value Stream P&L	**Data Source**	**Completed**
The P&L general ledger has been mapped to the VSP&L format		☐
Value stream P&Ls have been created for all value streams		☐
All other departmental/functional expenses have been categorized		☐
Required cost allocations are segregated from actual costs		☐
The change in inventory can be calculated (manufacturing only)		☐
The company VSP&L reconciles to the P&L used for external reporting		☐
		☐
		☐

Box Score Analysis & Decision Making Checklist

Use this checklist to determine how Box Scores will be used

Operational Analysis & Decision Making	Notes	Completed
Calculate capacity requirements		☐
Capital expenditure justification		☐
Demand planning		☐
Hiring decisions		☐
Identify improvement opportunities		☐
Make or buy decisions		☐
Measure impact of an improvement event		☐
Measure impact of improvement events over time		☐
Measure impact of lean operating practices		☐
Review value stream performance		☐
Use in weekly value stream management		☐
Other:		☐
		☐
		☐
		☐
		☐

Financial Analysis & Decision Making	Notes	Completed
Analyze costs: labor, machine & material		☐
Calculate profitability of products & services		☐
Capital expenditure financial analysis		☐
Contribution margin analysis		☐
Cost of products & services (existing & new)		☐
Financial analysis of value streams		☐
Financial impact of improvement events (individual or cumulative)		☐
Insourcing/Outsourcing decisions		
Profitability of additional demand		☐
Profitability of new products & services		☐
Profitability of prices & quotes		☐
Setting prices & quoting		☐
Target costing		☐

Other:	☐
	☐
	☐
	☐

Planning Activities	Notes	Completed
Budgeting		☐
Future state value stream mapping		☐
Hoshin/Strategy deployment		☐
Monthly SOFP/Hoshin reviews		☐
Product & process development		☐
		☐

Practices to stop:	Completed
	☐
	☐
	☐
	☐
	☐
	☐
	☐

NOTES:

NOTES:

NOTES:

Execution is the Only Strategy Your Customers Ever See: Hoshin Kanri Lessons From 26 years in Procter & Gamble and Danaher

VoC Session Survey

Olaf BOETTGER

VP DBS, Biotechnology Group - Danaher

Email: **o.boettger@web.de**

Phone: **+49-176-6129 3523**

LinkedIn: **olaf-boettger**

Speaker Bio:

27 years of experience in IT, Brand Management, Business Leadership, and Continuous Improvement at Procter & Gamble and Danaher - led businesses of up to $0.5B revenue. Worked in Danaher's DBSO and created new DBS tools in Innovation. DBS Leadership Coach in Danaher and Marshall Goldsmith certified coach in Stakeholder-Centered Coaching.

Session Summary:

Execution is the only strategy your customers ever see: Hoshin Kanri Lessons from 26 years in Procter & Gamble and Danaher.

Key Takeaways:

- Hoshin Kanri aims to connect strategy with execution. The best teams do this by building the business and building the organisation.
- 55 guiding questions for Hoshin Kanri: what, how far, how, how much, and who.
- 3 capabilities required for good strategy deployment: courage, humility and discipline.

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

Building a culture requires role-modelling and coaching.

Both are best done at Gemba: Go and see, ask why, respect people.

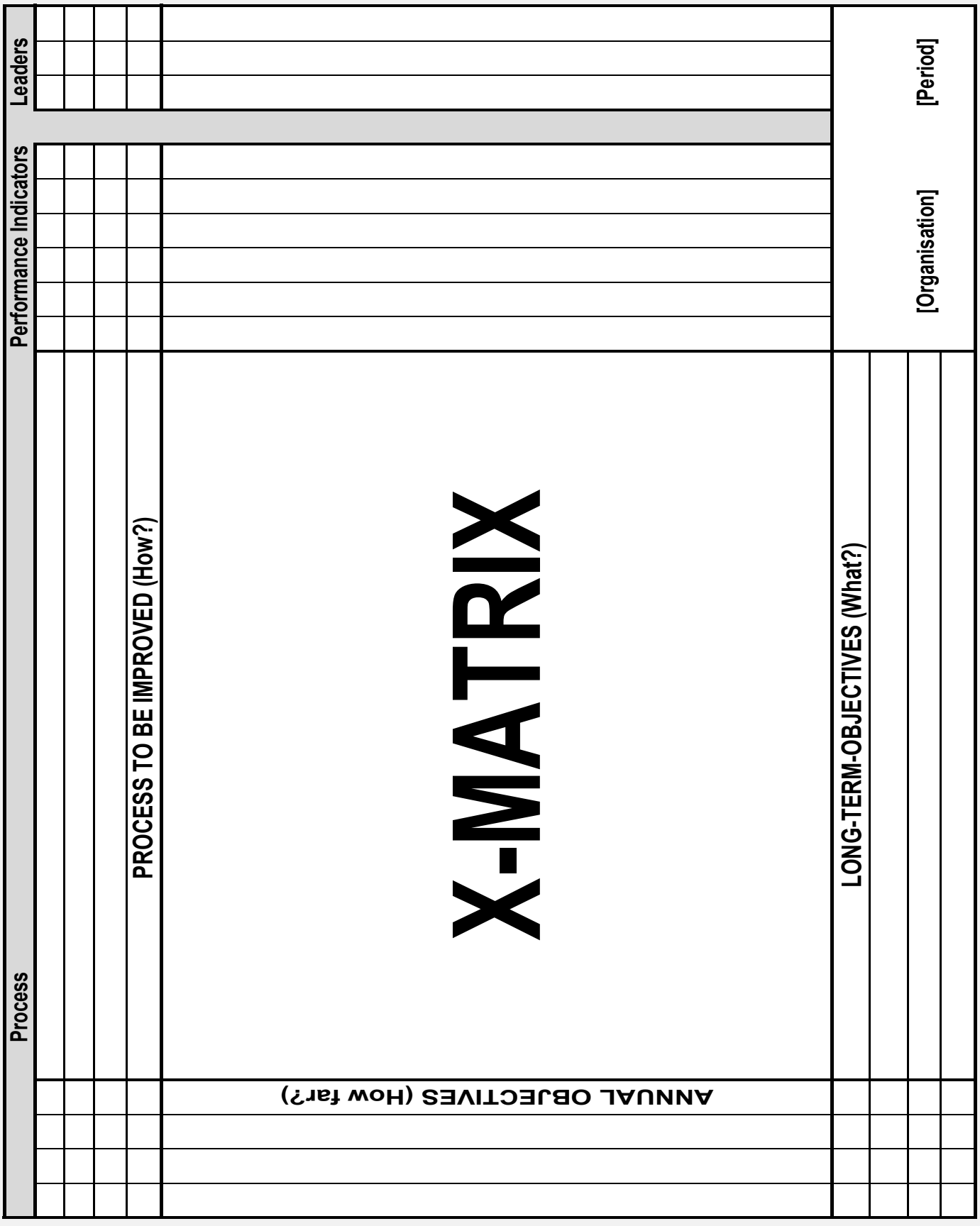
Continuous Improvement Mindset Survey

How ready are you for continuous improvement? (10 = definitely yes, 1 definitely no)

I commit to …

Courage	Score
1. Communicate to others what my team is working on to improve.	
2. Ask my team and others (including customers) for feedback and suggestions regarding our performance.	
3. Avoid waiting for a better time to try out new behaviours and processes.	
4. Honestly look at what behaviours and processes my team would benefit from starting, stopping, or changing.	
Humility	Score
5. Ask others to help me and my team while we are working on continuous improvement.	
6. Truly listen to feedback and suggestions about our behaviours and processes.	
7. Show genuine appreciation for feedback and suggestions by saying “Thank you”	
8. Keep your ego from getting in the way as you collaborate with your team to improve our behaviours and processes.	
Discipline	Score
9. Stick to a daily or weekly routine of following up with my team and others.	
10. Refrain from any defensive reactions when others point out what we have not done well or what we could do better.	
11. Spend the needed time to change a behaviour or process, even if it is not comfortable for me or my team.	
12. Spend a few minutes every day reviewing your scorecard and action plan.	
Total Score:	

X-Matrix Template:



X-Matrix Example

				Process	Performance Indicators						Leaders		
		x		1 Conduct root-cause analysis for top 5 defect types	x								
				PROCESS TO BE IMPROVED (How?)									
		Reduce defect rate by 15% this year	**ANNUAL OBJECTIVES (How far?)**	**X-MATRIX**	Monthly defects (in #)						Queen Quality		
				LONG-TERM-OBJECTIVES (What?)	**Widgets Co.**						**2025**		
		x		1 Improve product quality by 60% in 3 years.									

NOTES:

NOTES:

The Power of Small Wins:
Empowering the Frontline to Solve, Learn, and Deliver using Lean Learning Card

VoC Session Survey

Nix JUBAN

Senior Technical Leader - Intel Corporation

Email: **moonshotenterprisellc@gmail.com**

LinkedIn: **nix-juban-9a676311**

Speaker Bio:

Nix is a seasoned Chief of Staff and Senior Technical Leader at Intel Corporation with 25 years of experience driving operational excellence and strategic execution. A certified Lean Six Sigma Black Belt, she leads Lean Strategy for Assembly Test Manufacturing (ATM) across seven global factories. Proven record delivering over $100M+ in cost savings, driving Lean Six Sigma deployments, and scaling strategic programs across geographies. Nix has facilitated over 1,000 hours of Lean training and 100+ Kaizen events across the U.S. and Asia, spearheading high-impact initiatives in Intel's IDM 2.0, Factory of the Future, and Data Fluency programs. Her leadership in manufacturing operations, engineering, and product development has consistently translated strategy into results, optimizing capital investments and accelerating factory performance.

Session Summary:

See how the Lean Learning Card turns frontline work into on-the-job training and continuous improvement. Rooted in Lean principles, it guides workers to spot waste and variation in real time, diagnose issues, and run small experiments. We'll share its origin in a greenfield Vietnam factory staffed by first-time operators, where it quickly built skills, confidence, and measurable process gains. The approach then scaled across factories in Asia and Costa Rica and into supplier sites. You'll leave with a simple, repeatable method to embed capability-building into daily work and empower frontline teams to drive improvement—regardless of experience or location.

Key Takeaways:

Understand Lean Learning Cards (LLC) – Explore how LLCs drive rapid, structured experimentation to enhance manufacturing efficiency.
Recognize Lean's Impact on Mindset & Behavior – Learn how Lean principles shape thinking and drive continuous improvement.- Apply Lean Tools for Waste Elimination
Use methodologies like PDCA, 5S, and Kaizen to identify and reduce inefficiencies.
Streamline Approval & Standardization – Improve process efficiency through structured LLC submission and disposition.
Demonstrate Business Impact – Assess ROI and strategic alignment of LLCs to operational excellence and cost savings.

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

Build a Problem-Solving Culture at all levels of the organization

Align Lean with Business Strategy

Standardize then only Innovate

Make Changes Stick with Leadership Engagement (Get buy-in)

Go to Gemba, don't be a lean desk keyboard warrior.

LEAN LEARNING CARD FORM

LLC#:

Use Job Aid at the back of form to help you fill up correctly, follow numbering for reference

AREA: _____ ☐ _____ ☐ _____ ☐ _____ ☐ _____ ☐ _____ ☐ _____ ☐

PRIORITY: **COST** ☐ *Will reduce/eliminate cost/consumption in material & spares* **QUALITY** ☐ *Prevent Quality or Yield Issue (Rework/Repair)* **PRODUCTIVITY** ☐ *Reduce Processing, Set-Up, PM & RepairTime*

1 WASTE OBSERVED: **T**ransportation ☐ **I**nventory ☐ **M**otion ☐ **W**aiting ☐ **O**verproduction ☐ **O**ver-processing ☐ **D**efect ☐

2 CURRENT SITUATION

WHAT is the activity/process affected? _____

WHEN is it a problem? _____

WHERE is it a problem? _____

WHO does it affect? _____

HOW does it affect? **(INCLUDE REQUIRED DATA)** **3**

Use data required based on waste observed. Include diagram, pictures or drawings of current situation.

Any additional information you attached? _____

4 PROPOSAL and EXPECTED OUTCOME:

Attach additional sheet and staple if necessary

If we do _____

We expect _____

Include diagrams, pictures, and drawings if you have for your proposal. If you have done a pre-experiment, compare what happened to what you expected. Is it different? Can you explain why?

Originator Name:_____ **Date**: __/__/___
ID#:_____ **Shift**: _____

Process/Activity documented in SPEC/BKM? No__ Yes __
If Yes, what is the **Spec/BKM#**: _____,

Reviewed with:_____
Idea Coach Name (If there is): _____

SUPERVISOR REVIEW: Review Date:___/___/_____
Supervisor Name/ID#: _____
If not approved, please provide reason:
- ☐ Not meet standards (lack info, incorrect entry, not up to standards etc)
- ☐ Not a Learning card (Escalation, Quality/Safety Early Report, PCS)
- ☐ Creates a Safety or Quality concern when implemented
- ☐ Duplicate/Similar Idea under experiment, execution or standardization
- ☐ Not Meet Priority Criteria (Cost, Quality, Productivity)

Return Date :___/___/____

Area Team Reviewer Name: _____
Area Team Review Date (d/m/year): ___/___/_____

Transferred to which forum/group: _____
New Review Date(d/m/year): ___/___/_____

DOE*: ☐ No Go, WHY? *(Please select category, include additional comments if necessary)
- ☐ Not meet standards (lack info, incorrect entry, not up to LC standards etc)
- ☐ Not a Learning card (Escalation, Quality/Safety Early Report, PCS)
- ☐ Creates a Safety or Quality concern when implemented
- ☐ Duplicate/Similar Idea already under DOE, execution or standardization
- ☐ Not Meet Priority Criteria (Cost, Efficiency or Quality)
- ☐ Solves the symptom but not the root cause (waste not reduced/eliminated)/Will cause other wastes
- ☐ Amount to spend on solution standardization outweighs benefit (No significant ROI)
- ☐ Product will EOL within the next weeks to 6 months
- ☐ Out of resource (budget, time, personnel) Delayed to: _____

☐ **Go Assigned to:** _____ **Experimentation Timeframe:** _____ **to** _____

Actual experiment results: _____

Standardization: ☐ **No Go Why?** _____
☐ **Go Standardization Closed Status:** _____ **Date (d/m/year):** ___/___/_____
Spec or BKM Change Required? Y____ N____

ROI (Return on Investment) Unit of measurement and Estimated Value (SELECT ONLY ONE)
- ☐ USD saved/year _____
- ☐ Number of waste eliminated _____
- ☐ Undefined _____
- ☐ Machine-hour saved/week _____
- ☐ Intangible _____

LEAN LEARNING CARD FORM

LLC#:

1 Waste Observed

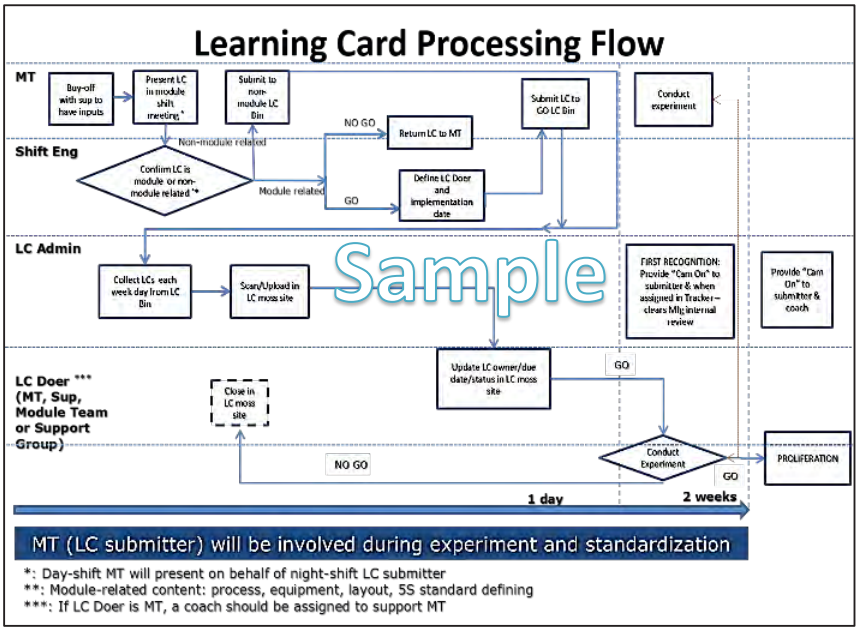
Waste Definition	Examples	Data required for "How does it affect the process" 3
Transportation - Unnecessary transportation & handling of goods	• Walking back and forth to search for hand tools for frequent assist • Frequent travel to drop point to refill indirect material • Long distance pushing of cart due to path blocked	• Distance (steps, meters, etc.) • Frequency (How many times a shift/week?) • Number of times (a day, an event) • Mode of Transport (Ergo cart, carrier, etc.)
Inventory - Goods awaiting further processing or consumption	• Pizza boxes greater than one shift worth kanban at Pack taking a lot of space. • Frequent Over order of indirect material • Books/Manuals kept for obsolete equipment or process	• How much inventory • How long does it stay there • Frequency (How many times it happens)
Motion - Unnecessary motion of employees	• Go around looking for ergo cart, gloves • Have to click mouse 20 times to look for data • Excessive movement reaching of operator	• Type of motion (walking, reaching, bending, searching, etc.) • How frequent? • Quantify impact (time, distance)
Waiting - Waiting for an upstream process to deliver or information	• Late delivery of direct material from warehouse to factory, causing idle in area 15 minutes. • Waiting for multiple approvals Mouse Clicks	• Event • Frequency • Time • What are you waiting for?
Over Production - Producing goods, information, reports that are not demanded by customers	• Always Over-WIP at a kanban • Shift reports available in 2 places • Printing a summary that is not needed in next station	• Where is it documented that it is expected • What would be the impact if we didn't do it any longer
Over Processing – Doing something to a product/ process that is more than the specification or customer requirement	• Multiple # of approvals required • Have to do E-forms online and also ask for paper signature for the same required approver	• If we didn't have to do this process, what is the impact to safety, quality, output, cost
Defects – Producing goods that do not meet specifications. Defect or Rework	• Wrong parts being delivered to downstream • No visual indicator for gauge on acceptable value • No passdown format, always missing information needed for shift • Activities that cause repair or rework	• What is the defect? • Frequency • Impact of defects?

2 Current Situation

Questions	Data to Include/Example
What is activity/process affected	What is affected (i.e. Pack Operations, Weekly PMs, End of Shift Passdown)
When is it a problem	What is the frequency of activity (i.e. During all Monthly PMs, during night shift, every end of shift)
Where is it a problem	Where is it occurring (i.e. Pole H5, Workstation Table inside toolshop, Tool in Area 5,6,7)
Who is affected	Who is specifically affected by this waste (i.e. , All shift EE, All ES, PM Crew)
How does it affect	Quantify the impact (i.e. Pack Operations takes 7 minutes longer, EE has to walk 200 meters). USE 3 in Waste Observed to answer the HOW and attach data required per waste type

4 Proposal /Expected Outcome

Follow below "formula" to help write out your hypothesis by completing the sentence:
If we do: ***What is your proposal that we do and/or change?***
You expect: ***If your idea is implemented what you think will change*** **to** happen



NOTES:

LEAN LEARNING CARD BINGO

Benefits of Developing Problem-Solving	Point of Activity	Name a Waste NOT Shown
The Heart of Lean	FREE	Intel Vietnam's 1st Product
Strategic Module Team Review Period	#1 LLC Waste	LLC Standardization Rate

NOTES:

NOTES:

Rewiring Your Operating System to Drive Meaningful Change

VoC Session Survey

Mohamed SALEH Ph.D.

Director of Lean, North America Region - Benchmark
Founder of Vizibility, LLC.

Email: **Saleh@vizllc.com**
Website: **https://www.vizllc.com**
LinkedIn: **Mohamed-Saleh-phd**

Speaker Bio:

Dr. Mohamed Saleh is a thought leader in shifting cultural mindsets by redesigning business systems. He has a successful track record anchored in two decades of hands-on transformations with a strong interest in making a global difference by providing distinctive leading-edge Lean-inspired education and advisory services aimed at helping organizations in an array of industries achieve the highest levels of performance excellence. He is an international keynote speaker, writer, mentor, executive coach, and experienced trainer.

Session Summary:

What if the real root cause isn't a process failure but a leadership system failure? In this provocative session, Dr. Mohamed Saleh peels back the layers of organizational performance to expose what truly drives—or derails—effective problem solving. Leaders will go beyond tools and tactics and into the architecture of behavior itself. We'll deconstruct four core organizational systems—the People System, Strategy Deployment System, Workflow System, and Daily Management System—to uncover how each either reinforces or erodes the principles your organization claims to stand on and the culture it propagates. Through the lens of systems thinking, we'll analyze how design choices silently shape behavior, decision-making, and ultimately, your culture's capacity to improve. If you're ready to challenge the invisible forces holding your teams back and lead change that sticks, this session is your starting point.

Key Takeaways:

- Identify misalignments between systems and desired behaviors
- Decode the behavioral signals your operating system is sending
- Engage in problem-solving at the system level, not just the symptom level
- Rewire structures to unleash purposeful, principle-driven change

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

Focus on One System at a time

Each Characteristic can have more than one Design Principle

Each Design Principle can be found in more than one Characteristic

NOTES:

When and How One-Piece Flow Enhances Quality

VoC Session Survey

Michel
BAUDIN
Consultant - The Takt Times Group

Email:
michel.baudin@takttimes.com

LinkedIn:
Michelbaudin

Speaker Bio:

Michel Baudin is an engineer, author, and consultant who graduated from Mines Paris PSL in 1977. His career spans Japan and Germany to the U.S., where he lives in Palo Alto. He advises manufacturers worldwide, blending shop-floor observation and stakeholder interviews with data mining to uncover patterns in demand and operations, then turning them into practical recommendations on management and technology. He has taught in-house for clients and with UC Berkeley, the University of Dayton, the Hong Kong Productivity Council, the University of Buckingham, and training firms in multiple countries.

Michel authored five books—Manufacturing Systems Analysis (1990), Lean Assembly (2002), Lean Logistics (2005), Working with Machines (2007), and, with Torbjørn Netland, Introduction to Manufacturing (2023)—and contributed chapters to the Handbook of Supply Chain Management, RFID Applications and Cases, and the Routledge Companion to Lean Management. In 2010, he translated Pascal Dennis's Getting the Right Things Done into French. A LinkedIn Top Voice, he has published 990 blog posts since 2011 at michelbaudin.com.

Session Summary:

Switching from batches to one-piece flow often slashes defects (e.g., from ~3% to ~0.3%) by enabling immediate detection at the next step and preserving sequence so you can spot drift early. It won't help when ~20% of output is bad—you still need buffers and a "hidden factory" for rework—and one-piece flow alone won't reach single-digit DPPM; you'll need robust error-proofing. This session explains how one-piece flow accelerates feedback, why WIP delays and scrambles signals, and how recent approaches—Toyota's Dantotsu Quality (Sadao Nomura), JKK (Shinichi Sasaki), and Nissan's QRQC (Kazuo Kawashima)—leverage these principles.

Key Takeaways:

- Realizing the quality improvement potential of converting to one-piece flow.
- Taking quality performance into account when deciding to convert to one-piece flow.
- Managing to sustain and enhance the quality improvements from one-piece flow.
- Taking the next step with error-proofing.

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

Change the work and the culture will follow

Notes on One-Piece Flow and Quality:

What is Quality?

- Agreement of reality with expectancy
- Conformance to specifications
- Other

Perception of Quality

- The crown jewels of the business
- The key to customer satisfaction
- A cost of doing business

Quality Level of Manufacturing Process

- Defective rate ≥ 10%
- Defective rate ~ 3%
- <10 defective parts per million
- Other

Quality Improvement Technology

- Statistics/Data Science
- Process physics and chemistry
- One-piece flow with FIFO
- Error proofing
- Other

Quality Management

- Specialists are responsible for quality
- Everyone is responsible for quality
- “Quality Management” is a category of software products
- Problem-solving methodology (PDCA, DMAIC, 8D, Why-Why,...)
- ISO-900x certification

Name of Our Approach to Quality Management

- TQM (US version)
- TQM (Japan version)
- Six Sigma
- QRQC
- Dantotsu Quality
- JKK
- Other

NOTES:

NOTES:

Daily Management

VoC Session Survey

Hide OBA 英嗣 大庭

Senior Consultant
H&M Operations Management LLC

Email: **hidetoba@hmoperationsmanagement.com**
Website: **hmoperationsmanagement.com**
LinkedIn: **hide-oba-4259561bb**

Speaker Bio:

Hide Oba is the son of Hajime Oba, a Toyota veteran who founded the Toyota Supplier Support Center (TSSC) and played a pivotal role in disseminating the Toyota Production System (TPS) globally.
In 2002, Hide joined his father's efforts to expand TPS beyond Toyota. From that point, he began working closely with him across North America and around the world.
Together, they founded H&M Operations Management, LLC in 2008 and implemented TPS in various industries. Hide continues to advise globally from his base in New York City, carrying on his father's practical coaching and shop-floor techniques.

Session Summary:

What if you could approach operations with greater clarity? By exploring the principles of Kanri, you can uncover actionable methods to drive better results at the Genba. Let's rethink daily management together.

Key Takeaways:

- Points: Control points and Ishikawa diagram
- Lines: Control Methods and QC Process Chart
- Areas: Standardzied Work
- Mechanism: Visualization and Fact Management
- System: Change point management and Housin Kanri

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

Go to Genba and actually see

Doubt everything

Standardize everything, even if it's temporary

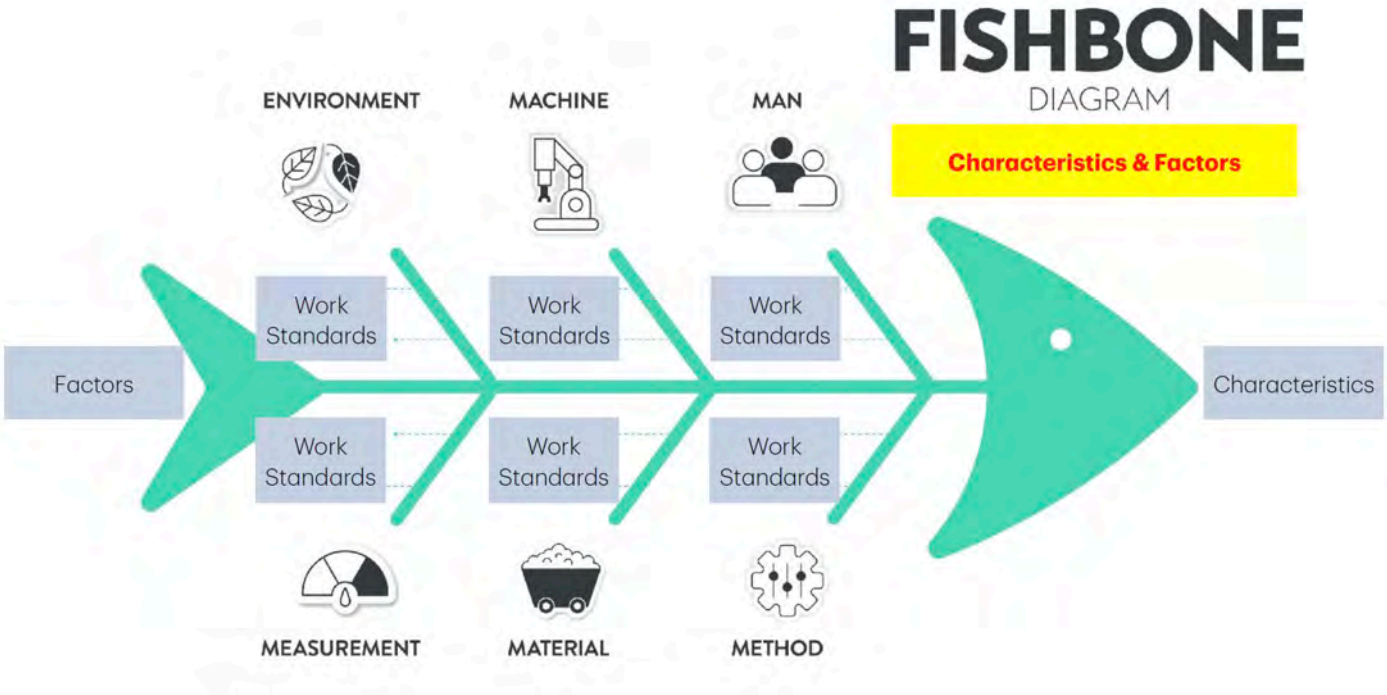
Try now without money before discussion

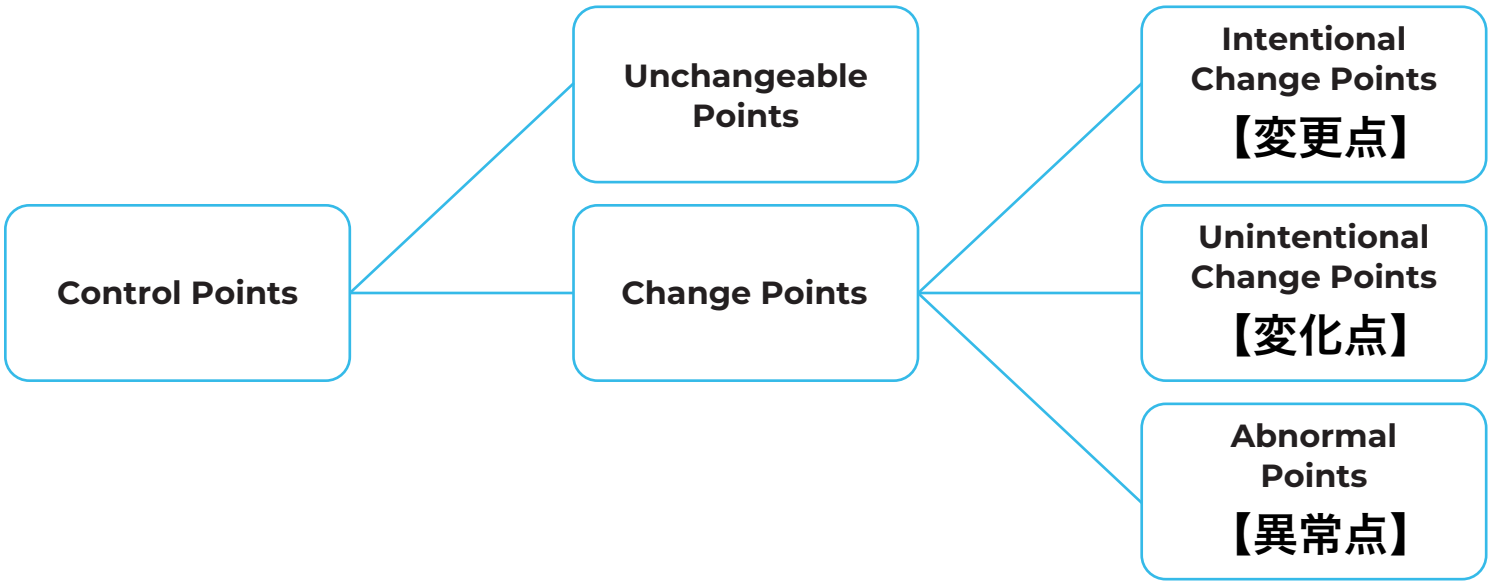
Start small, and then grow

I learn, you learn, we learn

Have fun

KAN	RI
管	理
管轄 Rule based on authority. Jurisdiction.	辨理 Distinction and process.
Administration	





	Safety	Quality	Stability	Productivity	Cost	Lead Time
KPIs						

Visualize

Standardized Work

Kaizen

	Man	Machine	Material	Method
Control Points				
Change Points				

Wisdom & Kaizen

Respect Humanity

Creating a work environment where people can trust the company.	Mechanism to permanently and voluntarily develop wisdom and Kaizen.	Promotion of teamwork, which executes individual roles & responsibilities and total efficiency.	Complete People Development.
Long Term Development.	On the Job Training.	Training Within Industry.	Manager Training.

Hide Oba Modified	TQC	TPM	TPS
Objective	Kaizen of corporate constitution		
	Quality Mindset	Equipment (Technology) centric	★ Human centric ★ Flexible to market
Subject of "Kanri"	★ Quality [Input]	★ Machine [Input]	★ Genba [Input] + [Variation]
Methods	"Systemaization" of "Kanri" (Systematics + Standardization) [Software]	Ideal state of "Genba" "Gebutsu" [Hardware]	Soft + Hard
Human Development	Kanri Technic (QC Method)	Unique Technology (Process & maintenance technology)	On Job Training Daily Learning
Small Group Activity	Voluntary Circle Activity	Office organization and small group activity	Voluntary + Organization
Target	PPM	Elimination of loss (Zero mindset)	Elimination of Waste Execution of Strategy

Process Control Chart

Process Control Table

Product Name		Line Name		Made By		Date	
Product No.		Area		Authorized by			
Type		Note		Control Number		Serial Number	

Process					Control Points						Control (Inspection) Methods												
Components / Material Name	Process Flow			Process Name	Control Characteristics			Quality Characteristics			Frequency				Sampling		Measure-ment Tool	Control Document	Check C Action A				Abnormal Treatment
	Raw Material	Sub	Main		Factor Name (5M)	Check Item	Manufacturing Conditions	Control Item	Check Process	Judge Standard	Shift Start	C/O	End of Shift	Other	Method	Measure-ment Method		Control Chart	FM	GL	TL	OP	

NOTES:

NOTES:

NOTES:

Matrix Influencing – For Lean Sustainability

VoC Session Survey

Karil SAMPSON

Director of Process Improvement
Cuyahoga County, Ohio

Email: **Karil.sampson@outlook.com**

LinkedIn: **Karilsampson**

Speaker Bio:

Karil is the Director of Process Improvement for Cuyahoga County, the second largest county in the state of Ohio, USA. He leads the Cuyahoga County Innovation Academy which teaches & promotes Lean Six Sigma methodology.
Karil has worked in the field of process improvement for 20 years. His journey has taken him through property insurance, information technology, academia, medical devices and public sectors. He has made a career of reminding people that complicated systems are made of simple components.

Session Summary:

The greatest obstacle to sustainable Lean transformation is not the frontline workforce—but the executive suite. This session explores how three critical variables—Work Culture, Leadership Style, and Executive Personality—shape the success or failure of Lean initiatives.
Influence—not authority—is the engine of change in matrixed organizations.

Key Takeaways:

- Diagnose whether the culture is hostile, moderate, or collaborative so you can choose the right Lean interventions and anticipate resistance, and tailor you Lean message to personality types.
- Influence the leader's thinking and engagement style—not their spot on the org chart—to accelerate adoption, and anticipate derailers by reading leadership styles.
- Test whether "collaborative" actually means aligned by probing KPIs, incentives, and priorities.
- Match your evidence to leader style—variation and audit trails for controllers, customer and team signals for harmonizers, future-state projections for visionaries.
- Build durable commitment with soft power—gemba walks, coaching questions, and specific praise—so leaders see themselves in the solution.

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

Listen actively

Communicate effectively

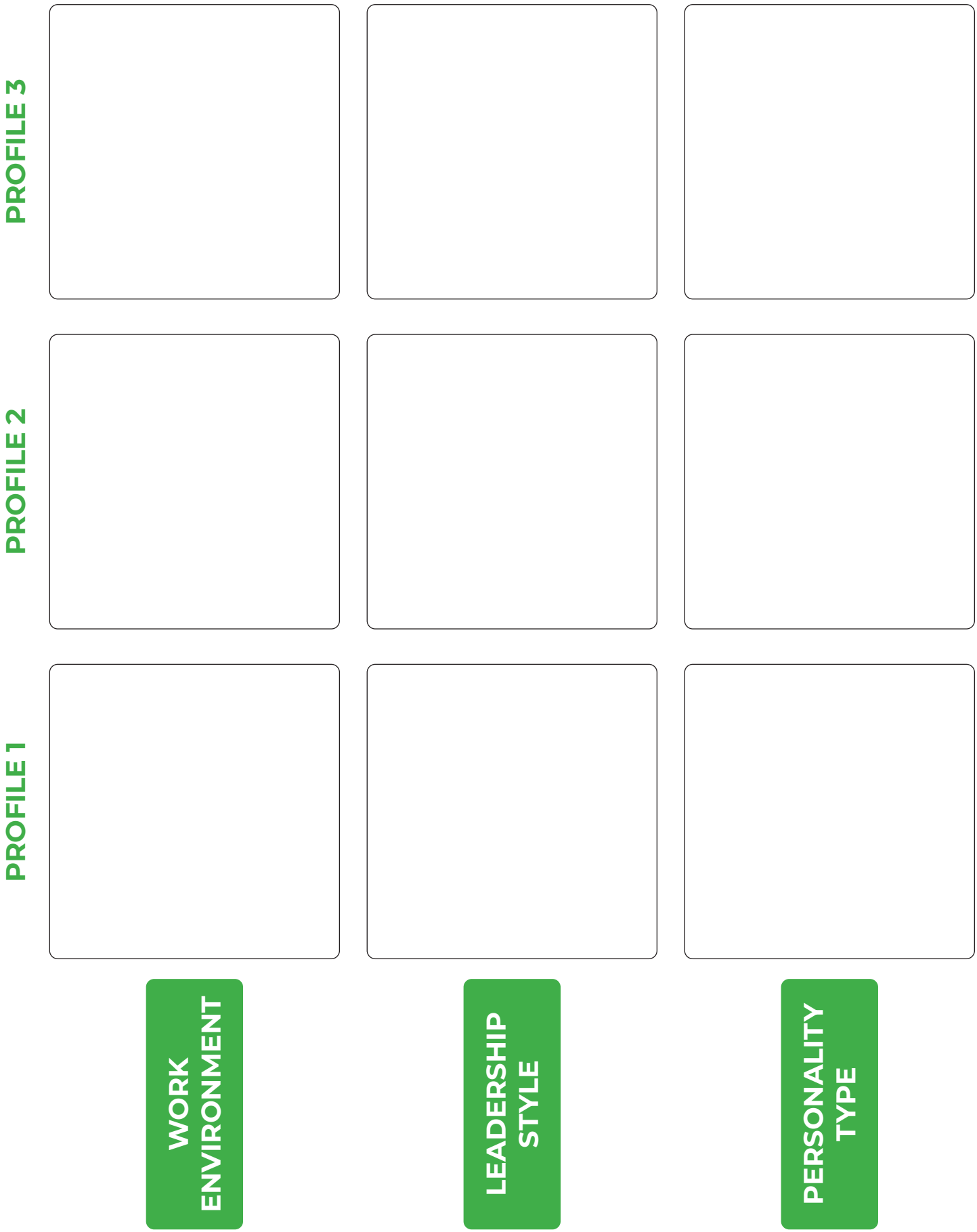
Never have a solution before understanding your environment

WORK ENVIRONMENT	Hostile	Moderate	Collaborative
LEADERSHIP STYLE	Autocratic	Balanced	Laissez-faire
PERSONALITY	Closed	Neutral	Open

WORK ENVIRONMENT	WORK ENVIRONMENT
Hostile	Anchor communication in **evidence and data** - Avoid public challenges; protect stakeholders from blame - Build one-on-one trust before group engagement
Moderate	Use **targeted influence** while observing group norms - Test waters with pilot projects - Find informal allies and gradually expand support
Collaborative	Lean into **co-creation and cross-functional input** - Emphasize shared wins and transparency - Use inclusive language and open feedback loops

LEADERSHIP STYLE	SUGGESTED APPROACH
Autocratic	Provide **clear options with structured recommendations** - Let them feel in control by making the final decision - Use hierarchical language (“executive directive,” “compliance,” etc.)
Balanced	Invite co-ownership of Lean projects - Balance structure and flexibility in your proposals - Use data and team input to support your case
Laissez-faire	Focus on **done-for-you** solutions with minimal burden - Offer quick wins and delegate-ready pilot plans - Be persistent in following up—avoid “set and forget” traps

PERSONALITY TYPE	SUGGESTED APPROACH
Closed	Start with **small, low-risk pilots** - Present peer examples and case studies - Avoid language that suggests sweeping change
Neutral	Frame Lean in familiar or organization-specific terms - Emphasize performance benefits over philosophy - Ask questions that surface latent resistance
Open	Highlight **innovation and experimentation** - Invite big-picture ideation sessions - Connect Lean to broader transformation goals


PROFILE 3
PROFILE 2
PROFILE 1
WORK ENVIRONMENT
LEADERSHIP STYLE
PERSONALITY TYPE

NOTES:

NOTES:

Why Don't People Speak Up?
What Every Lean Leader Must Know

VoC Session Survey

Mark GRABAN

Author of "The Mistakes that Make Us"
Podcaster, and Lean Consultant

Email: **mark@markgraban.com**

Website: **www.markgraban.com**

LinkedIn: **mgraban**

Speaker Bio:

Mark Graban is an internationally-recognized consultant, author, professional speaker, podcaster, and entrepreneur. He has learned, practiced, and taught these methodologies in settings including manufacturing, healthcare, and technology startups. Mark is also a Senior Advisor to the software company KaiNexus.

Session Summary:

Even the best Lean tools and practices won't deliver results if people don't feel safe speaking up. Why do huddle boards sit empty? Why are problems left unspoken? The answer often isn't a lack of motivation—it's a lack of psychological safety.

In this thought-provoking session, Mark Graban draws on real-world examples, data, and stories from healthcare and beyond to show how psychological safety is the foundation for problem-solving, continuous improvement, and innovation. Attendees will explore why well-intended Lean efforts stall and what leaders must do to create environments where mistakes are learning opportunities, not triggers for blame.

This session offers practical takeaways for building trust, encouraging voice, and fostering a culture where Lean thinking can thrive—from the front lines to the boardroom.

Key Takeaways:

- Understand the concept of psychological safety and why it's essential for continuous improvement.
- Recognize common organizational behaviors that unintentionally silence team members.
- Identify the leadership habits that create safer, more open environments for speaking up.
- Apply practical strategies to encourage problem solving and idea sharing across all levels.
- Reflect on their organization's culture and assess readiness for Lean practices to truly take root.
- Commit to actions that foster a culture of learning from mistakes—not one of blame.

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

Ask more than you tell. Genuine curiosity invites conversation.

Celebrate ideas and small wins. Progress reinforces participation.

Respond to mistakes with learning, not punishment.

Model vulnerability. Admit what you don't know. Others will follow.

Don't just install tools—build trust. That's the harder work, and the more impactful.

Key Concepts:

Psychological Safety /ˌsīkəˈläjək(ə)l/ · /ˈsāftē/ noun

"A belief that one will not be punished or humiliated for speaking up with ideas, questions, concerns, or mistakes."

— Amy Edmondson
HBS Professor, Author

Two Ingredients for Speaking Up:

- Psychological Safety – I feel safe to speak.
- Problem-Solving Capability – I know how to act on what I see.

Mistakes Happen – So Let's Learn from Them

- Process mistakes → Prevent with mistake-proofing
- Innovation mistakes → Learn through small tests of change (PDSA)

Signs of Low Psychological Safety

- ☐ Empty huddle boards
- ☐ Silence in meetings
- ☐ Fear of being labeled "negative"
- ☐ Little reporting of issues or near-misses
- ☐ Blame when things go wrong

Leadership Actions That Build Safety

- Respond with curiosity instead of criticism
- Praise speaking up—even when it reveals problems
- Acknowledge your own mistakes
- Follow through when people raise concerns
- Avoid punishing the messenger

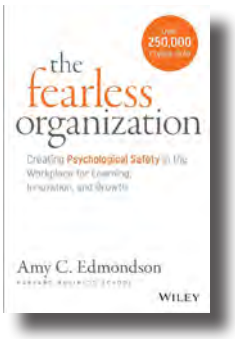
Reflection Questions

- What signals am I sending when someone brings me a problem?
- How does my team respond to mistakes—silence, blame, or learning?
- What's one action I can take this week to encourage speaking up?

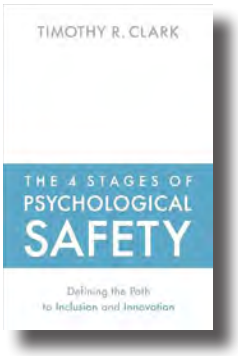
Resources:

The Mistakes That Make Us by Mark Graban

The Fearless Organization by Amy Edmondson



The 4 Stages of Psychological Safety by Timothy R. Clark



"My Favorite Mistake" Podcast

NOTES:

Setting Up Daily Management for the Office

VoC Session Survey

Jared THATCHER

Host of the Global Lean Summit

Email: **thatcher.jared@globalleansummit.com**

Website: **www.globalleansummit.com**

LinkedIn: **jaredthatcher**

Speaker Bio:

Not only is Jared the host of the Global Lean Summit, but he is experienced in introducing Lean rollout strategies to companies like Daimler, Nike, Standard Insurance, Alaska Airlines, and many others. He is an Amazon best selling author with "Parenting the Lean Way", and he is starting an Executive Lean Immersive Mentoring program that will take Lean professionals to see Lean in action in Japan, engage in a year of monthly Lean mastermind sessions to get them to the next level on their Lean journey.

Session Summary:

Office work isn't like the factory floor—and trying to manage it like it is, creates frustration, inefficiency, and confusion. Unlike the rhythmic flow of an assembly line, office work is messy, variable, and deeply cross-functional. So why do most daily management practices treat the office like a production cell? In this session, you'll learn how to create a Daily Management system built for office complexity. One that boosts performance, accountability, and morale, while reducing distractions, silos, rework, and burnout. We'll walk through the tools, structure, and mindsets needed to set up a high-functioning Office Floor Management Board that becomes the team's trusted daily compass and transforms how you manage and utilize Lean in the office.

Key Takeaways:

- Understand the critical differences between shop floor and office environments—and why they demand different management approaches.
- Identify the essential elements of an effective Office Floor Management Board.
- Know how to lead daily team huddles that drive focus, transparency, and continuous improvement.
- Understand the steps for creating an Office Floor Management Board that meets your needs.
- Use simple metrics and visual cues to track work, surface issues, make improvements.
- Avoid common traps like micromanagement, info overload, or creating boards that go stale.

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

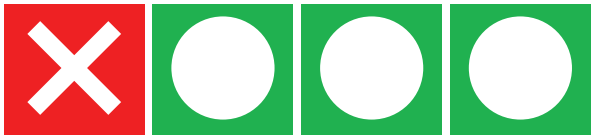
A good leader motivates their people through challenges and praise rather than by fear and intemidation.

Employees are NOT "Human Resources", rather they are individuals, and we need to be adapable and agile in how we lead them.

Respect for People is not a throw-away line, it really is at the heart of Lean.

Shop Floor Management (SFM) Boards

Start of Shift Report Card (Hot Start) -------->



DAILY REVIEW

Section (Dept) Leadership	Dress Code	Toyota Daily News	Starting Position of Team Members	
One-Pt Lessons		KHYP (Kaizen How's Your Process?)		
Safety KPI	KPI	KPI **WED**	Man	
Team Responsibilities	5 Why's	Skills Matrix	Method	
Emergency Evac Areas		Skills Shift 1	Materials	
Tornado Safety Zones	Standard Work	Skills Shift 2	Machine	
MONDAY SAFETY	**TUESDAY QUALITY**	**WEDNESDAY PRODUCTIVITY**	**THURSDAY CHANGE POINT**	**FRIDAY HR DEVELOPMENT**

Elements of an Office Floor Management Board:

Opportunities & Counter-Measures Form

#	OPPORTUNITY / CONCERN	CONTAINMENT / COUNTERMEASURE	STATUS	RAISED BY	OWNER	TARGET DATE	SOP (Y/N)	COMPLETED DATE

Office Floor Management Feedback Form

Areas of focus	Meeting Structure and Team Dynamics	Capacity & Performance	Specific Action / Problem-Solving
	1. Team members arrived on time and were prepared? 2. Structure and agenda are followed? 3. Right level of detail was used? 4. Board remained a safe space, where people were allowed to discuss issues and concerns?	1. Capacity discussed and optimization identified? 2. Discussions about driving future performance? 3. Both positive and negative performance is discussed? 4. Opportunities for improvement identified?	1. Andon cord pulled, and problem documented on the board? 2. Problem-solving requirements identified and captured? 3. Action items defined to close gaps? 4. Responsible people assigned to actions (including deadlines)?

Observations: _____ **Week of:** _____

	Strenghts	Areas of Improvement	Focus/Action for Tomorrow
M			
T			
W			
Th			
F			

	Questions	Assessments
Time Period	· Did the huddle start on time? · Does the meeting take 15 minutes? · Is the time schedule for each agenda item met?	No ——— Yes Longer ——— Shorter Exceeds Time ——— Perfect
Performance Discussions	· Are deviations to the standard documented? · Are the KPIs concisely discussed, and improvements captured? · Are the targets clear?	No ——— All No ——— All Vague ——— Clear
Discussions of Newest Problems	· Are root causes & lasting corrective actions identified for issues? · Is it clear for all actions who is responsible and a deadline set? · Is it clear who updates the SOPs and how they do should do it?	Never ——— Always No ——— All Vague ——— Clear
Discussions of Recurring Long-Term Problems	· Are new problems kept on the board until solved? · Is the counter-measure completely update by meetings end? · Is a 30 – 60 – 90-day tracking used to validate counter-measure?	Never ——— Always No ——— Yes No ——— Always
Discussions of Newest Problems	· Does the leader communicate clearly in a results-oriented way? · Does the leader make sure that the discussions stay on topic? · Does the leader generate enthusiasm and motivation? · Does the leader give positive feedback when appropriate?	Vague ——— Clear Off Course ——— Focused Low Energy ——— Energetic Never ——— Always

Feedback:

NOTES:

8D Problem Solving

Using a Structured Approach to Improve the Customer Experience

VoC Session Survey

Adam LAWRENCE

Kaizen Ninja
Founder of Process Improvement Partners, LLC.

Email: **atlawrence@pi-partners.com**

Website: **www.pi-partners.com**

LinkedIn: **adam-t-lawrence**

Speaker Bio:

Adam Lawrence is the creator of The Wheel of Sustainability and a recognized expert in applying Kaizen and continuous improvement principles to real-world business challenges. As the founder of Process Improvement Partners LLC, Adam partners with leaders and teams across manufacturing, distribution, service industries, and government agencies to drive sustainable, breakthrough results. With decades of hands-on experience, Adam coaches, mentors, and facilitates teams to embed problem-solving capabilities that stick, empowering organizations to reduce waste and improve performance, creating lasting value for their communities and stakeholders. Based in Lancaster, PA, Adam works globally while staying grounded with his family — his wife and son (his Board of Directors).

Session Summary:

Discover how top-performing companies use the powerful 8D problem-solving method to improve quality, reduce risk, and delight their customers. Originally developed by Ford, this high-energy, fast-paced session breaks down the 8 Disciplines (8D) and shows how to apply them in your own operations for immediate impact.

Key Takeaways:

- The eight steps of 8D problem solving—and how they work together
- Practical examples of how leading companies use 8D to improve customer experience
- Why the 5 Whys uncover root causes better than most methods
- How “Show Me” deepens engagement, while “Yes/No” shuts it down
- How to clearly define a problem using 5W2H
- How to use Gemba walks as your secret weapon

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

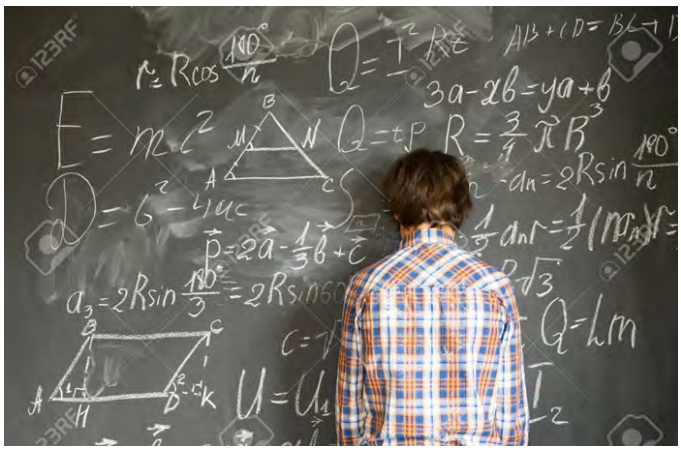
Continuous improvement should be so easy and so engaging that everyone wants to participate. Don’t overcomplicate it – it’s like bowling, anyone can do it.

Kaizen is messy – be flexible and ready to zig and zag to meet the needs of the team.

Don’t let best get in the way of better. Try something, learn from it, and then improve it. No time to wait or waste.

Go to Gemba – the answers are in the Gemba, not in a meeting room.

The 8 (really 9) Ds

	***0D - Containment*** *Stop the process. Contain the problem. Protect the customer.*
	***1D - Form the Team*** *Be purposeful as you pick the team that can help you find the root cause, solve, and prevent recurrence.*
	***2D – Define the Problem*** *Utilize the 5W2H framework to fully describe the problem.*

The 8 (really 9) Ds

3D – Interim Containment Actions

Assuring there are no escapes.

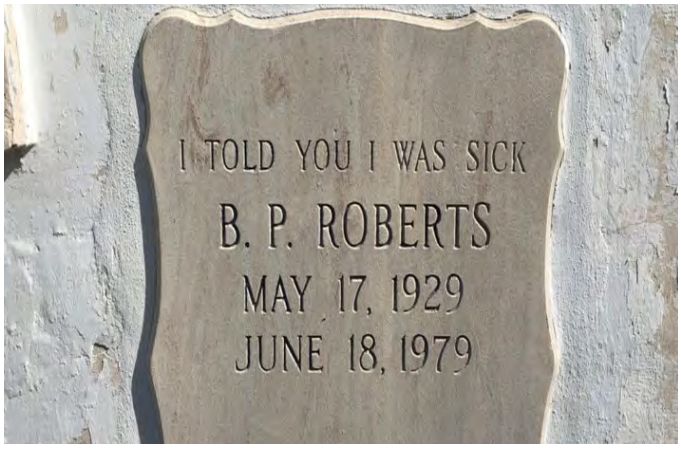
4D – Determine Root Cause

Make no assumptions. Use 5 Whys and other methods to verify you have found the true root cause.

5D – Identify Permanent Corrective Actions

Test and retest until you know the problem is solved.

The 8 (really 9) Ds



6D – Implement permanent corrective actions

Once identified and proven, make appropriate updates to processes and standard work.

"I'm looking for an extra-strength 'ounce of prevention'."

7D – Define systemic preventive actions

What can we do to keep this issue from happening again across all products and processes?

8D – Recognize the team

They worked hard to protect the customer. Let's celebrate their success!

NOTES:

NOTES:

Operational Rhythm: Increasing Personal & Team Continuous Improvement Rhythm and Building Lean Culture

VoC Session Survey

Katie VOTOLATO

Senior Lecturer

Email: **votolato@iu.edu**

Consulting Email: **katie.votolato@continuousresultsllc.com**

LinkedIn: **katievotolato**

Speaker Bio:

Katie is a senior lecturer at the Kelley School of Business, where she earned her MBA. She previously held operations and supply-chain roles at Toyota and GE, working across automotive, aerospace, energy, healthcare, and distribution. Her experience spans quality, engineering, production, purchasing, supplier development, and project management. At Toyota and its suppliers she learned and applied Lean, the Toyota Production System (TPS), and a methodical approach to problem solving. Her focus is building continuous improvement through action-based problem solving that delivers measurable results. At Kelley she teaches Lean & Six Sigma, Design Thinking, and Business Analytics, and she consults through her firm, Continuous Results, helping teams turn ideas into implementation. Her teaching and consulting emphasize simple routines, clear standards, and rapid experiments. Outside work, she's usually outdoors with her family—often pedaling her kids around town and exploring local parks.

Session Summary:

Workflow optimization sounds pretty straightforward, so why do individuals and organizations struggle to make it happen and keep up momentum? It's easy to get busy in your regular daily work and not make time for improvement projects, so you need to build continuous improvement work into your daily, weekly, and monthly rhythms. This session will dive into some practical ways to build in this Operational Rhythm to increase CI work individually and in organizations.

Key Takeaways:

- Strategies for building in Operational Rhythm through these 4 phases:
  1) Commitment & Rhythm;
  2) Rhythm drives momentum;
  3) Momentum requires orienteering; and
  4) Orienteering with collaboration.
- Learn the tools necessary to facilitate Operational Rhythm through each of these phases.

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

Engage strategic groups of people.

Select projects purposefully for early success then growing in scope and impact over time.

Build in operational rhythm to continue momentum towards improvement.

Action Items

	Action Items	Who?	Due Date	Notes
1				
2				
3				
4				
5				
6				
7				

Sample CI Calendar - Project Level

Phase	Item	Feb '20				Mar '20				Apr '20					May '20				Jun '20				Jul '20					Notes
		2/3	2/10	2/17	2/24	3/2	3/9	3/16	3/23	3/30	4/6	4/13	4/20	4/27	5/4	5/11	5/18	5/25	6/1	6/8	6/15	6/22	6/29	7/6	7/13	7/20	7/27	
Planning	Interview stakeholders, 3 tiers	○	○																Key: ○-Planned, ●- Completed									
	Work together on Meaningful Metrics	○	○																									Help as needed to finalize metrics
	Prep for 4 Hour Workshop Training			○																								Customize approach from interviews
	2 Hour Leadership Training				○																							Train Sr. Leadership & Managers
	Determine project & team (5-8ppl)				○																							
1st Project	Prep for Project Kickoff					○																						
	4 hour Kickoff, Training, Charter						○																					Core team mainly, stakeholders for KO?
	4 Hour Kaizen Event, Setup Action Items List							○																				4 hour right amount of time?
	Begin weekly project update meetings								○																			
	Continue weekly update meetings									○	○	○	○	○														Each team 1 hour meeting/week
	Prep for 2nd Kaizen Event - Focus actions													○														Choose focus from action item list
	2nd 4 Hour Kaizen Event													○														
	Continue weekly update meetings														○	○	○	○										Is another Kaizen event needed?
2nd Project	Prep for Project Kickoff										○																	
	4 hour Kickoff, Training, Charter											○																
	4 Hour Kaizen Event, Setup Action Items List												○															
	Begin weekly project update meetings													○														
	Continue weekly update meetings														○	○	○	○	○									
	Prep for 2nd Kaizen Event - Focus actions																		○									
	2nd 4 Hour Kaizen Event																		○									
	Continue weekly update meetings																			○	○	○	○					

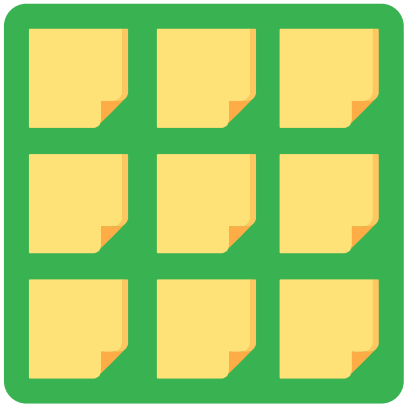
Parking Lot List

	Idea/Issue/Question	Originator	Notes/Comments
1			
2			
3			
4			
5			
6			
7			

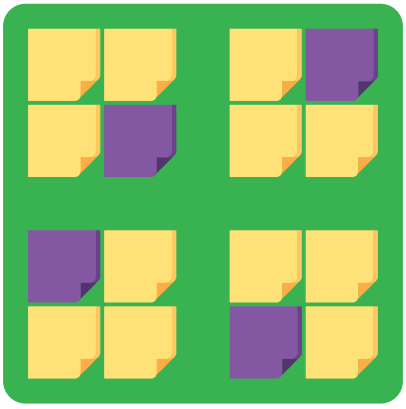
Yes, and...

- **Step 1 - Plan a party with group of 2-3**
  - Every statement must start with “Yes, but...”
- **Step 2 - Plan a party with group of 2-3**
  - Every statement must start with “Yes, and...”
- **Yes, and - Collaborative, cons?**

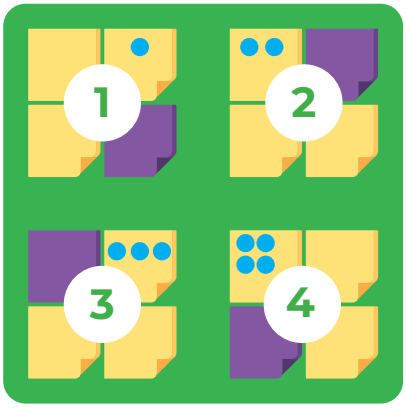
STEP 1
Generate ideas as sticky notes.



STEP 2
Organize notes into clusters.



STEP 3
Prioritize clusters and next steps.



NOTES:

The Cleveland Clinic Improvement Model
Engaged. Empowered. Expected.

VoC Session Survey

Kevin FLEMING

Sr. Continuous Improvement Advisor - Cleveland Clinic Florida

Email: **flemink2@ccf.org**

Phone: **772-262-3084**

Speaker Bio:

Kevin Fleming is a results-driven healthcare improvement leader with 3 decades of experience driving operational excellence across healthcare, manufacturing, and nonprofit sectors. At Cleveland Clinic Florida, he partners with executives and frontline teams on initiatives that have saved over $21 million, reduced hospital-acquired harm, and improved outcomes. A certified Six Sigma Black Belt, Lean Bronze Professional, and Quality Engineer, Kevin brings deep expertise in strategic planning, problem solving, coaching, and team development. At Catawba Valley Health System, he built a Lean Department from the ground up, delivering multimillion-dollar savings and system-wide engagement via the "Raise the Bar" framework. He holds an MBA focused on Human Resources and International Business and is passionate about mentoring future healthcare leaders and embedding continuous improvement into daily work.

Session Summary:

This session offers an in-depth introduction to the Cleveland Clinic Improvement Model. Attendees will learn what the model is, how it was implemented across the Cleveland Clinic, and how it continues to be sustained. We'll explore how the model centers on "What Matters Most" by engaging, empowering, and expecting every individual in the organization to contribute to daily improvement. The session will feature real stories from our journey and concrete examples of the model's impact on both patients and caregivers.

Key Takeaways:

- Describe the key elements of the Cleveland Clinic Improvement Model and the "What Matters Most" approach to driving system-wide transformation.
- Explain how engaging, empowering, and expecting every caregiver to improve supports a culture of continuous improvement.
- Discuss deployment strategies such as "working with the willing" and using model areas to accelerate adoption and momentum.
- Identify practices that sustain a long-term culture of improvement across a large health system.

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

Executive Commitment: A visible and sustained executive commitment to Continuous Improvement

Foundational Training: Train teams to "learn to see"

Engagement: Make it easy for employees to participate in improvement work

Empower: Support the work with time, resources, and coaching

Celebrate: Reinforce by celebrating wins and recognizing contributions

Cleveland Clinic

Cleveland Clinic Improvement Model (CCIM)

Engage Every One to Achieve Our Goals

ORGANIZATIONAL ALIGNMENT

Identify and communicate what matters most.

LEADING LEADERS

- Set Strategy, aligned with our enterprise goals.
- Continually share a common, clear and consistent vision of your area's purpose and future.
- Build alignment. Discuss what matters most with patients and caregivers.

LEADING TEAMS

- Translate leadership's vision. Establish metrics and objectives for team's success.
- Align daily work to enterprise goals.
- Create alignment. Routinely ask patients, senior leaders and team members what matters most.

AS PART OF A TEAM

- Connect your work to local and enterprise goals.
- Understand how your work impacts patients and others you work with.
- Identify your process measures that support Cleveland Clinic's goals.

TOOLS

- Leverage our enterprise **mission and goals** to guide your work.
- Use the Goal Setting: OKR Guide (Objectives and Key Results) and view the Performance Management-OKR Video **at Connect Today.**
- Create **drive-and-watch metrics**.

VISUAL MANAGEMENT

Manage what matters most.

LEADING LEADERS

- Visit with patients and caregivers to see, hear and confirm what matters most.
- Reinforce what matters most and the desired behaviors that support our culture.
- Respond to meaningful changes in drive-and-watch metrics.

LEADING TEAMS

- Advance improvements through sharing and discussing drive and watch metrics with your team.
- Foster team participation in identifying and solving problems.
- Use today's discoveries to improve tomorrow's performance.

AS PART OF A TEAM

- Huddle often.
- Track measures for all to see. Learn from the metrics and improve your work.
- Communicate as a team.

TOOLS

- A step-by-step video tutorial is available at **Visual Management Tutorial.**
- Utilize the Drive-Watch dashboard to monitor performance.
- Use the **tiered huddles** to identify, address, and share issues.

PROBLEM SOLVING

Improve what matters most.

LEADING LEADERS

- Help build team problem-solving skills. Provide time to improve work.
- Provide focus on the problems that matter most to all stakeholders.
- Create a psychologically safe environment for caregivers to share information in support of highly reliable processes.

LEADING TEAMS

- Foster a safe environment and teamwork.
- Discuss problems and errors openly with empathy to enable learning. Share improvements.
- Ask questions that help the team discover root causes. Use data. Encourage experiments.

AS PART OF A TEAM

- Identify and improve activities that don't add value or could go wrong.
- Use team problem-solving process to eliminate waste and drive improvement.
- Innovate through small and large changes.

TOOLS

- Use the five improvement questions and Plan-Do-Check-Adjust (PDCA) process.
- Use **Kaizen cards and boards** to share and prioritize problems.
- Solve problems using **Just Do It (JDI). Root Cause, or Complex (A3) approaches.**

STANDARDIZATION

Sustain what matters most.

LEADING LEADERS

- Go and see standard principles and desired behaviors in your area.
- Ensure processes are designed for all caregivers to be successful.
- Ensure diversity of representation in all activity.

LEADING TEAMS

- Confirm standard processes are maintained and followed.
- Establish an environment that supports all caregivers speaking up about safety, quality, experience, and equity issues.
- Reduce unnecessary variation.

AS PART OF A TEAM

- Identify and document the current, one best way to do a job.
- Take responsibility for following standards each and every time.
- Share and improve standards through the PDCA process.

TOOLS

- Establish and confirm standard work. Follow regulations, standards, and **policies** that apply.
- Use available checklists each and every time.
- Utilize **Process Confirmation** to ensure we follow our most critical processes.

Every caregiver capable, empowered, and expected to make improvements, every day.

Criteria for Spread & Mature Lean Practices

ORGANIZATIONAL ALIGNMENT Identify and communicate what matters most.	VISUAL MANAGEMENT Manage what matters most.	PROBLEM SOLVING Improve what matters most.	STANDARDIZATION Sustain what matters most.
OBJECTIVES & KEY RESULTS Limited # of aligned OKRs at each level with clear gap from desired future state	**MONTHLY OPERATING REVIEWS** MORs exist from dept. to exec. That review OKRs and Op Scorecards, and have clear data driven plans to drive improvement on misses	**KAIZEN (CAREGIVER IDEAS)** Caregivers are consistently submitting, reviewing, and completing improvement ideas *that are delivering results*	**PROCESS STANDARD WORK** Standard work for key processes is documented, and caregivers and leaders understand the current standard
OPERATIONAL SCORECARDS Standard set of core metrics exist across like business functions that are watched for abnormalities	**DAILY MGMT. & TIERED HUDDLES** Local teams huddle daily using standard boards to solve problems and tiered huddles effectively address escalations	**STRUCTURED PROBLEM SOLVING** A3 thinking, PDCA and other CI tools are routinely used to solve complex problems (e.g., OKRs) at all levels, *which is delivering results*	**LEADER STANDARD WORK** Leaders have documented leader standard work and are tracking adherence & follow-up actions

A3 Template

A3 Title:

Project Sponsor:	Project Lead:	Project Owner:	Revised Date:

BACKGROUND

What is the problem you are trying to solve or analyze?

Questions to Consider:

a. Who is the project sponsor, project lead and process owner? What is the project sponsor's commitment to the project?

b. Who is on the project team, and do they understabd their roles and responsibilities? How will the team work together effectively? What is the team's meeting schedule?

c. What is the problem you are trying to solve or analyze? Who is affected by the problem? What is wrong? Where, when and how large is the problem?

d. Who are the stakeholders impacted by this problem? What level of support and engagement do you need from them?

e. What is the target condition (if this problem did not exist)? What is your case for change? What are the rational and emotional reasons for the change?

Tools

A3 Toolkit Link

a. Project Roles, Sponsor Contracting

b. RACI, Ground Rules, Thinking Round

c. Problem Statement, In/Out of Scope

d. Stakeholder Analysis, Drama Triangle

e. Elevator Speech

CURRENT CONDITIONS

What are the current conditions now?

Questions to Consider:

a. What are the current conditions now? What can you go and see at the location where the process occurs (Gemba)? What is working well and not working well in the process?

b. Which process waste(s) exist in the current condition?

c. What facts, data or metrics can you collect that indicate there is a problem? Where can the data be found? How can you show and share the data visually (charts, graphs, maps, pictures)?

d. What could happen that would jeopardize the success of th eproject? What limitations exist?

Tools

a. Gemba Observations, Process Mapping, SIPOC

b. Forms of Waste

c. Check Sheet, Data Collection Plan

d. Risk Plan

GOALS / TARGETS

What specific process and outcome metrics do you plan to impact?

Questions to Consider:

a. What specific process and outcome metrics do you plan to impact? Do you have a SMART goal (is it specific, measurable, attainable, relevant and time bound)?

b. What is your anticipated tmeline for the project?

c. How will you communicate relevant information about the project to your stakeholders? How will you share your case for change (rational and emotional resions for the change) with them?

Tools

a. Aim Statement

b. Project Task Plan

c. Stakeholder Analysis, Communication Plan

ANALYSIS

What are the possible root causes of the problem?

Questions to Consider:

a. What obstacles (process wastes) in the current condition are preventing you from reaching the target condition? What are all the possible causes of the problem?

b. Which of the possible causes are you addressing now? How can you ask the people and ask the process to help prioritize which causes to focus on?

c. Why do these causes exist? What is (are) their root cause(s)?

Tools

a. Crawford Slip, Affinity Sort, Fishbone Diagram

b. Multi-Dot Voting, Decision Matrix, Pareto Analysis (80/20)

c. 5 Whys

RECOMMENDATIONS / COUNTERMEASURES

What are the potential countermeasures for addressing the root cause(s)?

Questions to Consider:

a. What are the potential countermeasures for addressing the root cause(s)? How can your team share the root cause(s) with stakeholders and listen to their ideas?

b. Are there other teams with similar root causes that have implemented countermeasures? Can you learn from them? Which countermeasures will you implement based on their impact and effort?

c. What will the future condition look like? What standard work will you create or update to ensure stakeholders understand the new future process?

Tools

a. Crawford Slip, Affinity Sort

b. Idea Continuum, Impact Effort Matrix/Scoring

c. Process Mapping, Standard Work

PLAN

What tasks will be completed to test and implemented countermeasures?

Questions to Consider:

a. What impact will your countermeasures have when they are implemented? What is the changing between the current condition and the future condition?

b. What actions need to take place before implementing your countermeasures? Who will be responsible for what and by when? How quickly can you go and see results?

c. How can you commmunicate process changes to stakeholders in a way that provides crystal clear direction, gives a jolt of energy and makes the process easy to follow?

d. What specific training needs will stakeholders have? After implementing your countermeasures, how will you check in with stakeholders to support them and evaluate the process?

e. How will you measure the effectiveness of your countermeasures (is it a process metric or outcome metric)? How can you show and share the data visually?

f. Do the project team and project sponsor agree to move forward with implementing the countermeasures on the planned date?

Tools

a. Impact Analysis, Risk Plan

b. Project Task Plan

c. Elevator Speech, Switch Principles

d. Training Checklist, Monitoring Plan, Communication Plan

e. Data Collection Plan

f. Go/No Go Checklist

SUSTAIN

How will you sustain the improvement?

Questions to Consider:

a. How will you ensure ongoing Plan-Do-Check-Adjust (PDCA)? How and when will you know if your countermeasure(s) have had the impact needed? How will you share your progess with stakeholders?

b. Once you achieve your target, what processes will you use to enable, assure and sustain success? Did you make the improvement part of standard work?

c. What were your results? What did you expect to happen? What actually happened? What did you learn?

Tools

a. Monitoring Plan, PDCA Checklist, Communication Plan

b. Sustainment Plan

c. Reflection Questions

RECOGNITION

How will you share and celebrate your story?

Questions to Consider:

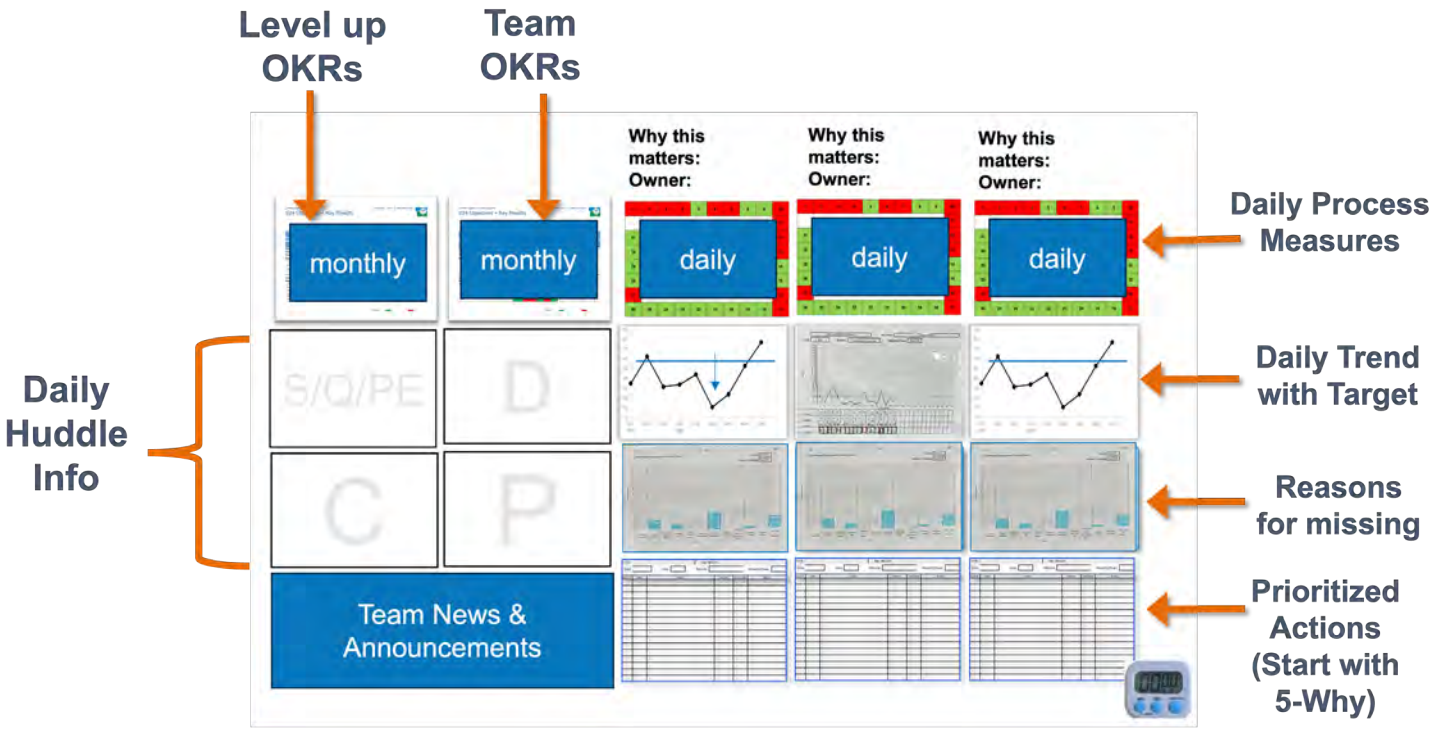
a. How will you share your story and learnings with others who could benefit within your own area as well as externally (poster presentations, conferences, etc.)?

b. How can you celebrate success with stakeholders and thank them for their efforts? How can you recognize the project team?

Tools

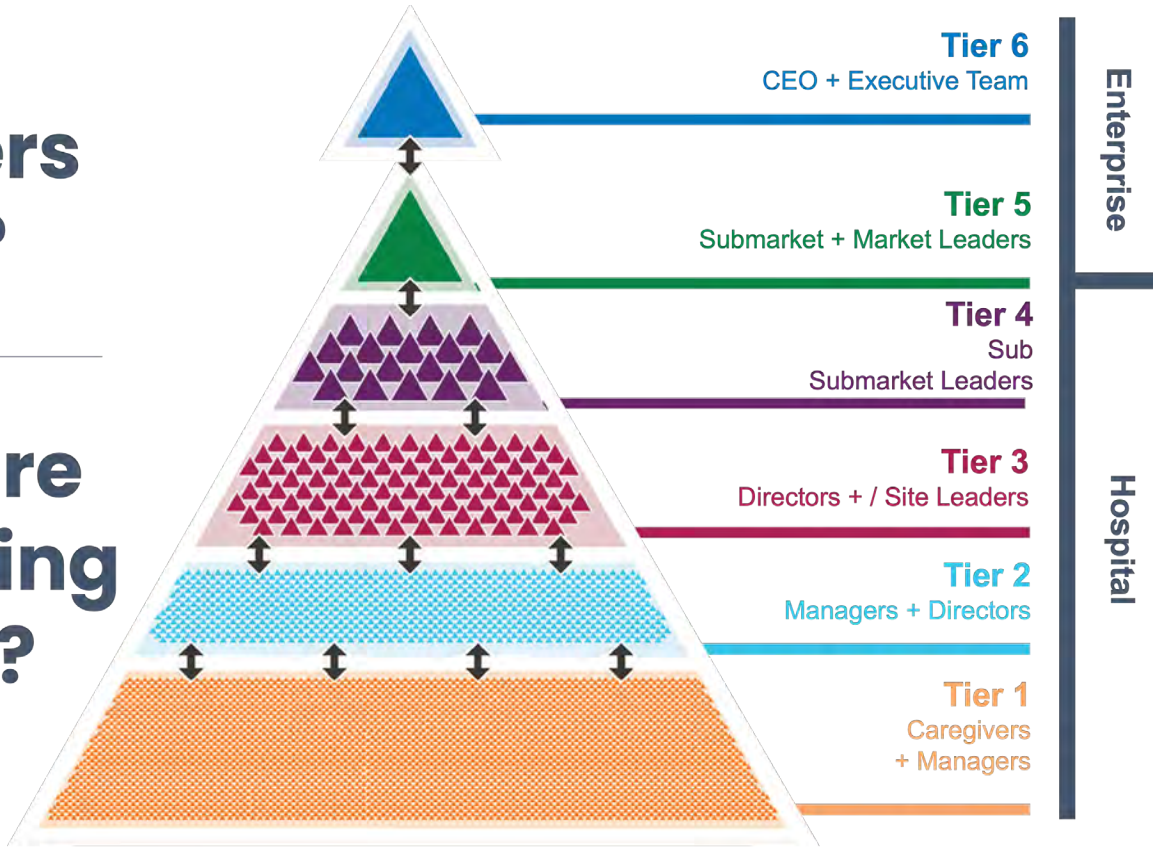
a. Report Out Template


Cleveland Clinic
Cleveland Clinic Organizational Alignment
Mission: To provide better care of the sick, investigation into their problems, and further education of those who serve.
Objectives & Key Results (aka Drive Metrics) (connect with key results from enterprise leaders – these become your objectives)
2021 Objectives + Key Results Institute/Hospital Name
Care for Patients
2021 Objectives + Key Results Institute/Hospital Name
Care for Caregivers
2021 Objectives + Key Results Institute/Hospital Name
Care for the Organization
Objective Level Performance Data (indicate target and baseline, charted)
Key Result Level Performance Data (indicate target and baseline, charted)
Plan to Achieve Results (utilize A3s, 4 Blockers, action plans to share progress)
Plan of Care Visits


Level up OKRs
Team OKRs
Why this matters: Owner:
Why this matters: Owner:
Why this matters: Owner:
monthly
monthly
daily
daily
daily
Daily Process Measures
Daily Huddle Info
S/Q/PE
D
C
P
Daily Trend with Target
Reasons for missing
Team News & Announcements
Prioritized Actions (Start with 5-Why)

What matters most?

How are we doing today?



Lean Road Map

We can use **clear, deliberate questions** to understand:

Improvement Model

- What **matters most**?
- How are we **doing today**?
- What's getting **in the way**?
- Are we **all** using the **best-known way**?

NOTES:

NOTES:

Fall Down Seven, Get Up Eight

My Top 3 Lessons Learned: Insights Gained From Two Decades of Experimenting With Lean

VoC Session Survey

Isaac MITCHELL

VP, Project Management and Operational Excellence
Ballad Health

Email: **isaac.mitchell@balladhealth.org**

Website: **www.isaacbmitchell.com**

LinkedIn: **isaacmitchell**

Speaker Bio:

Isaac Mitchell is a seasoned strategy deployment executive specializing in organizational transformation through Lean methodologies. As Vice President of Project Management and Operational Excellence at Ballad Health, he leads enterprise-wide initiatives that drive measurable, operational improvements and culture change across a 20-hospital healthcare system.

A Toyota-trained engineer with deep expertise and process optimization, Isaac brings a unique perspective to healthcare transformation by identifying solutions at the critical intersection of people, process, and technology. His data-driven approach focuses on improving both patient outcomes and provider experiences while building sustainable operational excellence solutions.

Isaac serves as a guest lecturer and on the Board of Advisors at the University of Tennessee's Department of Industrial and Systems Engineering. He holds Fellow status in both the American College of Healthcare Executives (ACHE) and the Institute of Industrial and Systems Engineers (IISE).

Isaac founded the Lean Book Club (www.leanbook.club) & Lean Coffee Club (www.leancoffee.club)

Session Summary:

Embracing failure as a learning opportunity, maintaining patient-centered focus, and practicing authentic leadership can drive meaningful healthcare improvement through three transformative lessons. The session showcases real-world examples from process redesign, hospital construction, technology integration, systems thinking, visual management, and crisis response. These cases demonstrate how Lean principles lead to measurable patient outcomes while achieving significant cost savings and operational efficiencies.

Key Takeaways:

- Lesson One: Focus on the Patient - Everything Else Will Follow
- Lesson Two: Technology is Not a Silver Bullet Solution
- Lesson Three: Visual Management - Practice What You Preach
- Learning from Mistakes: "Fall down seven times, get up eight"

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

Embrace Failure as a Learning Opportunity: The Japanese proverb "Fall down seven times, get up eight" exemplifies the resilience needed for continuous improvement.

Patient-First Decision Making: Every process, technology, and policy decision should be evaluated through the lens of patient value and experience.

Systems Thinking Application: Understanding interconnected relationships prevents local optimization, which can create global problems.

Technology Integration Strategy: Always design processes around people first, and then implement technology to support optimized workflows.

Visual Transparency: Make work visible at all organizational levels (especially the Lean Department) to drive accountability and collaboration.

Celebration and Recognition: Acknowledge team efforts and share success stories to maintain momentum.

Key Takeaways:

A. Lesson One: Focus on the Patient - Everything Else Will Follow

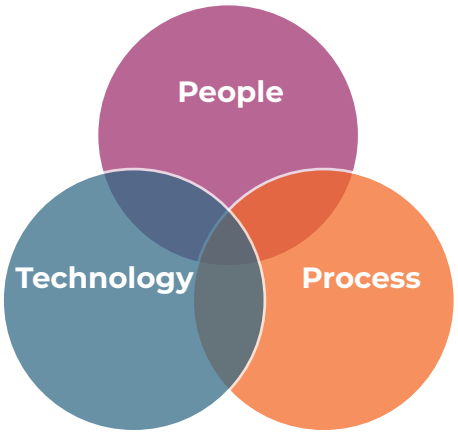
i. Core Principle: Patient-centered design drives all other improvements in healthcare delivery.

ii. Culture Building: Develop strategies for building improvement cultures starting with frontline teams and practicing authentic leadership.

iii. Lean in Healthcare:

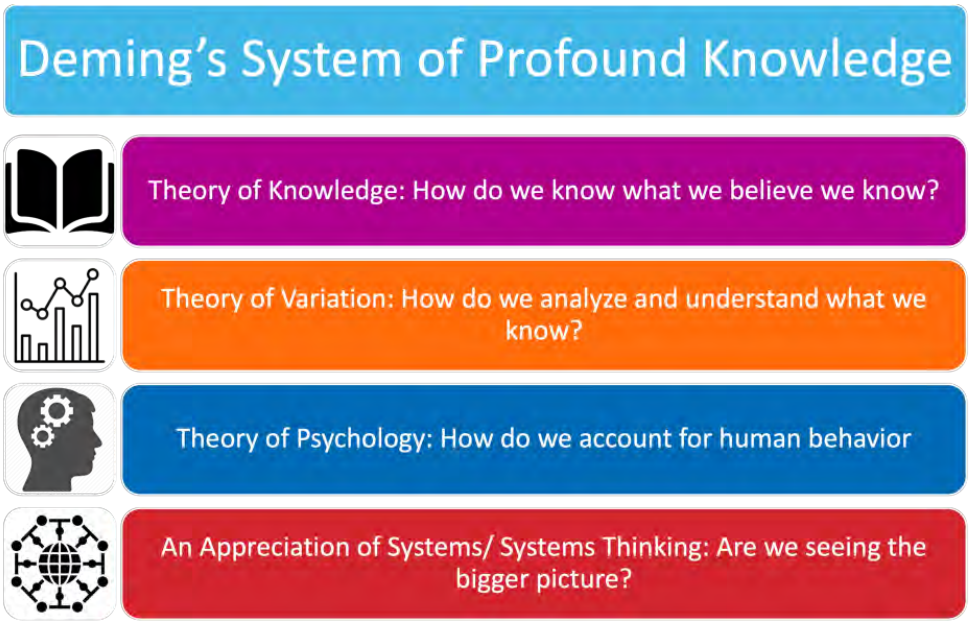
B. Lesson Two: Technology is Not a Silver Bullet Solution

i. Core Principle: Effective healthcare improvement requires harmonious integration of People, Process, and Technology.



ii. Technology alone cannot solve healthcare challenges. Successful implementations require simultaneous attention to all three elements, with particular emphasis on understanding human behavior and process flow before introducing technological solutions.

iii. Systems Thinking: Apply Deming's System of Profound Knowledge to gain a broader perspective and understand the interconnectedness of healthcare processes. Systems thinking is the ability to see how one thing is part of a larger, connected system.



C. Lesson Three: Visual Management - Practice What You Preach

i. Core Principle: Authentic leadership requires leaders to apply the same standards and transparency they expect from their teams.

ii. Visual Management: Are we winning or losing? What's the score? Turn data into information that can help tell the story about the current business status.

1. Makes it easy to understand information
2. Reduces miscommunication and requests for information
3. Improves employee involvement and morale

iii. Article: Ballad Health EPMO Uses Smartsheet Modern PPM to Integrate 20 Hospitals: https://shorturl.at/y5kik

D. Lesson Four: Learning from Mistakes: "Fall down seven times, get up eight."

i. Define Your Goal: Clearly articulate what you want to achieve. Fill in the left eye. This signifies your commitment to the goal.

ii. Place the Daruma: Position the Daruma in a visible location where you'll be reminded of your goal daily.

iii. Achieve Your Goal: Once you've accomplished your goal, fill in the right eye. Some people also burn their Daruma dolls at the end of the year, expressing gratitude and making way for new goals.

Reflection Questions for Leadership Teams

Strategic Reflection

1. How consistently do we apply patient-centered thinking to our decision-making processes? Can you provide specific examples where patient value drove a difficult organizational choice?

2. When implementing new technology, do we adequately address the people and process components? What evidence supports your assessment?

3. In what ways does our visual management system reflect the transparency and accountability we expect from our teams?

Operational Reflection

4. Describe a recent failure in your organization. How did leadership respond, and what learning opportunities were captured or missed?

5. How do frontline staff members connect their daily work to organizational mission and patient outcomes? What mechanisms support this connection?

6. During your last crisis or significant challenge, how did your visual management and communication systems perform? What would you change?

Cultural Reflection

7. If you surveyed your staff about psychological safety to report problems and suggest improvements, what would you expect to learn?

8. How do you currently celebrate and share success stories across your organization? How might you enhance these practices?

9. What would happen if you eliminated your current reporting structure for one month and relied solely on visual management? What does this thought experiment reveal?

Implementation Reflection

10. Looking at your current improvement initiatives, which ones truly focus on patient value versus internal efficiency? How might you reframe projects to strengthen patient centricity?

11. How do you ensure that improvement efforts sustain beyond initial implementation? What systems and structures support long-term change?

12. In what ways do you personally model the Lean behaviors you expect from your organization? Where might you strengthen your own practice?

NOTES:

NOTES:

Unlocking Hospital Capacity:
Transforming Hospital Operations Through Push to Pull Lean Redesign of Inpatient Flow

Dr. Danna QUNIBI

Chief Operational Excellence Officer
Children's Health

Email: **compassopex@gmail.com**

LinkedIn: **dqunibi**

VoC Session Survey

Speaker Bio:

Danna W. Qunibi, MD, MBOE is a physician-executive and Lean Six Sigma Black Belt who leads hospital-wide operational transformation at UT Southwestern and Children's Health. As Chief Operational Excellence Officer, she's known for translating complex challenges into actionable, team-driven solutions that improve flow, cut waste, and elevate the patient experience. A pediatric intensivist by training, Dr. Qunibi completed her residency at Johns Hopkins, fellowship at Northwestern, and holds a Master's in Operational Excellence from The Ohio State University.

Session Summary:

Ready to change how hospitals move patients? Join us for an energizing session that dives into transforming inpatient flow by shifting from outdated push systems to efficient pull models. We'll uncover how batching decisions creates invisible bottlenecks, increases idle time, and limits hospital capacity—even after patients are medically ready. Through hands-on activities and engaging role play, you'll experience the impact of push vs. pull firsthand and leave with practical tools to reduce LOS and unlock bed availability.

Key Takeaways:

- **Think Big, Start Small:** Learn how to tackle hospital-wide flow challenges by zooming into targeted areas—solving locally to drive system-wide impact.
- **Collaboration Without Collision:** Discover tactics to drive cross-disciplinary alignment without stepping on toes—yes, it's possible!
- **Break the Rules (Strategically):** Feel empowered to challenge outdated metrics when data and real-world observations tell a different story.
- **Make Tech Work for You:** Transform your EMR from a burden into a tool that supports, rather than disrupts, team workflows.
- **Change Doesn't Happen Overnight:** Embrace the power of small PDSAs, steady momentum, and persistence to achieve lasting transformation.

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

Ensure inclusive stakeholder involvement

Humble Inquiry

Respect

People who do the work own the improvement

A3 Framework Playbook for Healthcare Throughput Improvement

Getting Started: Using the A3 Framework to Drive Improvement Projects
The A3 Framework is a highly effective tool for initiating improvement projects in healthcare settings. It provides a structured approach to problem-solving that aligns organizational goals with actionable solutions. Below is a step-by-step guide to applying the A3 Framework to address throughput challenges

Step 1: Identify the Overarching Problem
What is the primary problem of the presentation and what was its impact on organizational goals.

_____

_____

_____

Step 2: Narrow the Focus
Tips:
Drill down into the problem by asking "why" to uncover underlying constraints.
- Inventory: accumulation of incomplete work
- Waiting: Patients, tasks, or staff waiting
- Defects: rework due to errors or inefficiencies

Example:
- Why are patients waiting for a bed
- Why are rooms occupied? Patients are waiting:
- For a hospital bed (admission) because patients are medically ready but not discharge ready
- To be discharged from the ED
- For diagnosis and treatment (e.g., lab results, radiology, consultant recommendations)
- For procedures (e.g., sedation and splinting for fractures).

What was the scope/focus of the initiative in today's presentation:

_____

_____

Answer = The problem was hospital capacity. We asked the question is it beds or who is taking up the beds and they said that patients were ready to discharge but had not been.

Step 3: Assess the Current State of Flow
Voice of the Data
Voice of the Process, Staff, Patients and Technology: a Gemba Walk

Tips:
- Collect data, observe workflows, and gather perspectives from staff and patients (Gemba).
- Document findings through value stream mapping with full team involvement.
- Critical Success Factor: Avoid relying solely on unit leader opinions. Observe firsthand, ask questions, and visit across shifts to truly understand current-state reality.

What did the data show about the problem of capacity in the hospital =

_____

_____

_____

Answer: that patients were stuck on the floor despite being medically ready, discharges happened around rounds so there were works in progress accumulating until rounds and not taken care of immediately. This meant patients were waiting in the ED a long time until rounds were done and discharges were placed and that's why capacity is relieved in the afternoons.

Why were patients stuck on the floor without a discharge order

_____

_____

_____

Answer: because no one knew when they would be medically ready until the attending said it. At that time nothing was prepared, so then we have to work on their discharge and this adds at least 1-2 days to their length of stay.

Step 4: Root Cause Analysis – Use Insights to Drive Action

Tips:

- Combine data, Gemba insights, and root cause analysis
- Use tools like fishbone diagrams, '5 Whys', and swim lanes to differentiate value vs. non-value tasks
- Critical Success Factor: Dedicate 80% of time to understanding the current state and root causes. Probe beyond surface-level answers.

Step 5: Develop Targeted Solutions

Design countermeasures addressing the highest impact constraints.

- Critical Success Factor: Use meaningful metrics. The project emphasizes push vs. pull systems and reducing discharge time variability over simply meeting a target discharge hour.

Step 6: Implement Plan for Accountability and Sustainability

Conduct weekly or biweekly team check-ins to:

1. Track progress
2. Discuss challenges
3. Adjust using PDSA cycles as needed

By applying the A3 Framework systematically, teams can transform patient flow, reduce bottlenecks, and elevate care delivery.

What are the 3 categories of support that is needed for true sustainability

_____

_____

_____

PROBLEM SOLVING FRAMEWORK

THE CHALLENGE, THE SCOPE

STAKEHOLDER & TEAM FORMATION (SIPOC TOOL)

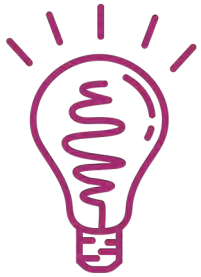
CURRENT STATE ASSESSMENT

CUSTOMER EXPERIENCE (THE PATIENT)

DATA, TECHNOLOGY

GEMBA, THE PROCESS, THE PEOPLE

ROOT CAUSE ANALYSIS



TARGETED SOLUTIONS → SOLVE & SUSTAIN

NOTES:

NOTES:

Our Journey to IU Health Bloomington at the Regional Academic Health Center: Day 1 and Beyond

VoC Session Survey

Chuck RUSSO

Retired Director-Operational Excellence – IU Health South Region

Email: **russoch@iu.edu**

Phone: **1 (812) 361-4267**

LinkedIn: **chuck-russo-081b803**

Speaker Bio:

Chuck is a seasoned executive with leadership positions in engineering, quality, operations, product design, and breakthrough improvement in the Chemical, Plastics, Electronics, Medical Device and Healthcare fields. He has worked for large world-class companies including General Electric, AlliedSignal, Boston Scientific and Indiana University Health, and small startups developing new life saving medical devices.

Session Summary:

On December 5, 2021, in the middle of the one of the worst surges of the COVID-19 pandemic, IU Health Bloomington Hospital, at the Regional Academic Health Center, in Bloomington, Indiana, opened its doors. On Move Day, 122 patients were safely and successfully moved from the legacy hospital in Bloomington, a hospital that served the community since 1905. However, the story of how the IU Health Operational Excellence team utilized Lean methodologies and thinking to help optimize the design and activation of the hospital, started six years earlier, in 2015. The team who was a part of the project will tell this compelling story.

Key Takeaways:

- Understand how Lean methodologies can be effectively used in hospital design.
- Understand the importance of complex program and project management.
- Understand that success comes from doing the simple things well, (e.g. A3 Thinking, Value Stream Management, etc.).

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

Build and cultivate a strong relationship with senior management, with regular progress reviews

Develop a robust structure and processes for your continuous improvement initiative, with simple process and outcome measures

Build momentum with early, visible wins

Get everyone in your organization involved; from the front line to the C-suite

Indiana University Health LEAN Waste Walk Worksheet

1/9/13 v5

Date:		Name:		Hospital/Unit:	

	Type of Waste	Definition	Opportunities in my work area:
D	**D**efects (errors) 	Process does not meet quality standards and customer expectations. **Examples:** Medication errors, missed treatments, wrong tests ordered, unlabelled specimens.	
O	**O**ver Production 	Providing unnecessary products or services, or redundant steps. **Examples:** Unnecessary forms, duplicate tests, unused reports, process steps that don't add value.	
W	**W**aiting 	Delays, periods of inactivity, bottlenecks, or patient wait time. **Examples:** Waiting to be admitted/discharged, wait time in clinics or E.D., room turnover time, waiting for information or equipment, delayed test results.	
N	**N**on-utilized Potential 	Failure to fully utilize human potential (time & talents of people). Not working to full licensure. **Examples:** Failure to fully utilize the knowledge and skills of nurses and other healthcare professionals.	
T	**T**ravel & Transportion 	Unnecessary movement of supplies, equipment, patients, or staff. **Examples:** Staff travel time, moving supplies around; patients going to multiple sites for testing.	
I	**I**nventory/Scrap 	Excess inventory and supplies that are stored, expired or discarded. **Examples:** Stockpiling supplies, discarding supplies that have expired, wasting or losing supplies.	
M	**M**otion (search time) 	Extra steps taken by employees because of inefficient layout (hunting & gathering). **Examples:** Searching for equipment, supplies, information, and people.	
E	**E**xcess Processing 	Excess activity and processing steps caused by poor process design. **Examples:** Lack of coordination for discharge planning, duplicated phone calls, multiple handoffs.	

NOTES:

NOTES:

IU Health Bloomington at IU Regional Academic Health Center

IU Health TOUR

Derek Fields, Doug Starr, Rob Hood, Marty Blair, David Blasdel and Chuck Russo

Website:

https://iuhealth.org/

Speaker's Panel:

Derek Fields is the Regional COO (20 years at IU Health), **Doug Starr** is the Regional Director - Operational Excellence (14 years at IU Health), **Rob Hood** is a Senior Improvement Leader - Operational Excellence (20 years at IU Health), **Marty Blair** is an Improvement Leader - Operational Excellence (20 years at IU Health), **David Blasdel** is a Senior Improvement Leader - Operational Excellence (24 years at IU Health), **Chuck Russo** is a retired Regional Director - Operational Excellence (11 years at IU Health). This team has strong multidisciplinary experience in healthcare operations, complex project management and process improvement.

The tour will make four stops:

RAHC (Regional Academic Health Center) Hospital Design

This stop will be located on the ground level of the RAHC, in the Imaging area.

Daily Huddles

This stop will be located in the off-stage hallway on level one of the RAHC.

Performance Hub/Obeya

This stop will be located on the back wall of the 1940 conference room. A replica of the South Region Obeya will be implemented in the conference room.

Leader Standard Work

This stop will be located in the surgery conference room, on level 2 of the RAHC, and will give participants the opportunity to start developing their own Leader Standard Work.

Key Micro-Learnings (Takeaways):

1 _____

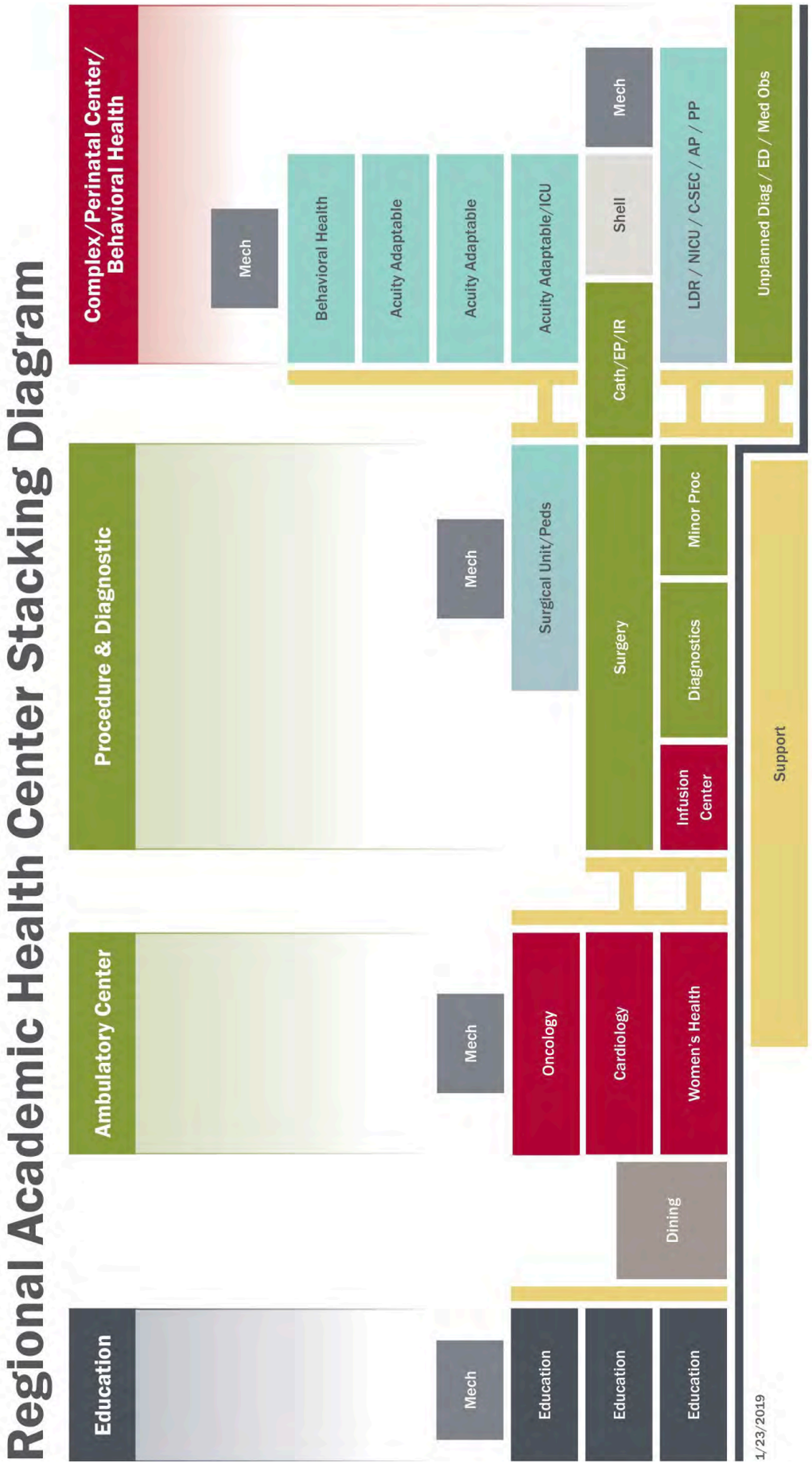
2 _____

3 _____

4 _____

KEY HOSPITAL FACTS:

Total Building Area: 695,900 sq. ft.
Total Acres: 53 acres
Total Parking Stalls: 1,798
On Time & On Budget – $557M
198 Inpatient Beds
166 Outpatient Beds
30 Observation Rooms
12 Surgery Overnight Rooms
2 Radiology Departments
Integrated Operating Rooms
Real Time Location System


Regional Academic Health Center Stacking Diagram
Education
Ambulatory Center
Procedure & Diagnostic
Complex/Perinatal Center/ Behavioral Health
Mech
Mech
Mech
Mech
Education
Oncology
Surgical Unit/Peds
Acuity Adaptable/ICU
Behavioral Health
Education
Cardiology
Surgery
Cath/EP/IR
Shell
Acuity Adaptable
Acuity Adaptable
Mech
Education
Women's Health
Infusion Center
Diagnostics
Minor Proc
LDR / NICU / C-SEC / AP / PP
Dining
Support
Unplanned Diag / ED / Med Obs
1/23/2019

NOTES:

NOTES:

NOTES:

NOTES:

LEAN PANEL DISCUSSION

Jenny SPRY

Adminstrative Director of Service Lines
Riley Children's Health

Email:
jspry1@iuhealth.org

LinkedIn:
jennyalexanderspry

Speaker Bio:

Jenny holds a degree in Operations Management from Purdue and spent nearly 10 years at Nestlé before bringing improvement methods to healthcare. Inspired by her mother, a life-long nurse, and a medically complex son cared for at Riley—Jenny is focused on bringing operational excellence to clinical care. Today, as Administrative Director of Service Lines, she remains grounded in that purpose: making it easier for care teams to do what they do best, to always serve the people behind the process.

Laura PULLEN McMICHAEL

Network OpEx Lead
Eli Lilly

Email:
lpmcmichael@lilly.com

LinkedIn:
lpmcmichael

Speaker Bio:

Laura Pullen McMichael is a seasoned leader, facilitator, black belt, and Baldrige examiner with extensive experience in healthcare and pharmaceutical manufacturing, specializing in operational excellence, lean six sigma, and performance improvement. She combines clinical expertise as an occupational therapist with advanced business and project management skills to empower teams and drive organizational success.

Troy TINSLEY

Regional Director of Supply Chain Operations
Indiana University Health

LinkedIn:
troy-tinsley-9a75487

Speaker Bio:

Troy is Regional Director of Supply Chain at IU Health. After studying Computer Information Systems and playing football at the University of Indianapolis, he began his career in IT and later earned an MBA from Indiana University. In 2012 he joined IU Health's Office of Transformation to help deploy the Lean Management System—moving from early skepticism to full-time Lean facilitator as he saw how A3 thinking and daily management amplify frontline voices. He later served as Director of Workforce Central, overseeing nurse staffing and scheduling through COVID. Since 2022, he has led regional supply chain operations, where Lean—especially the "Respect for People" pillar—guides CI Teams.

NOTES:

Leading The Toyota Way: Good Results; Good Behaviors

VoC Session Survey

SAM MCPHERSON

Founder - Lean Leadership Academy

Email: **Sam@theleanleadershipacademy.com**

LinkedIn: **sammacpherson**

Speaker Bio:

Sam McPherson is the founder and president of The Lean Leadership Academy and a Toyota Lean Management System Faculty Fellow for Toyota Material Handling. Additionally, he is an internationally recognized Lean Enterprise Transformation and Leadership Development Expert and is known as "Mr. Obeya" for his knowledge of setting up and operating Obeya rooms. Sam was trained in the Toyota Production System in the early 90's, as a Toyota Scholar Management Intern at TMMK-Powertrain and Engine Assemblvy, TEMA, NAPSC by Toyota's elite Operations Management Development Division and the Toyota Institute in Japan. Today, Sam still works closely with Toyota leaders past and present. In 2017, Sam was named a Shingo Institute Faculty Fellow and is a member of the Lean in Higher Education Steering Committee and POMS. Host of the Leading Excellence Podcast on YouTube and Spotify.

Session Summary:

A critical philosophy behind the Toyota Leadership Model is "Good Results; Good Behaviors." In this Keynote, International Toyota Leadership Expert, Sam "Mr. Obeya" McPherson, shares the key principles from Toyota Motor Manufacturing and Toyota Material Handling regarding what it takes to truly Lead the Toyota Way.

Key Takeaways:

- The Leadership Gap: Why is Lean Leadership & Leader Development failing?
- What's so different about Leading the Toyota Way?
- Good Results; Good Behaviors
- The Toyota Way Leadership Model: Foundations of Leadership
- What does Toyota look for and expect from its leaders
- How can you Lead the Toyota Way

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

Do not make the mistake of dedicating a wall to "PLAN"; a wall to "DO"; a wall to "CHECK"; a wall to "ACT"

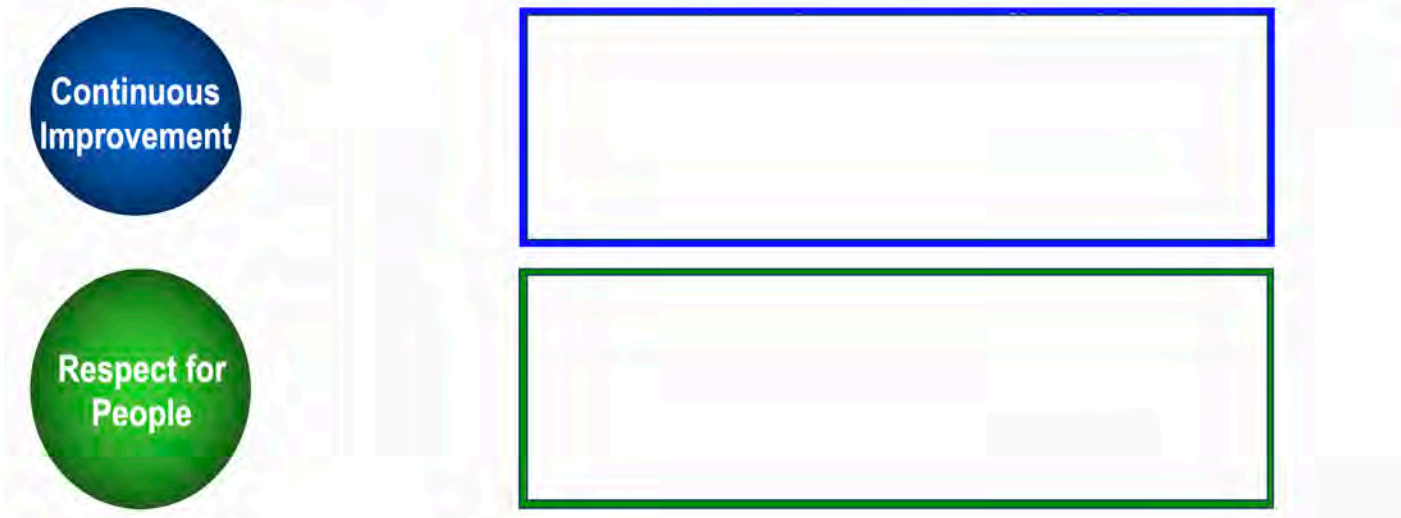
Start with the Schedule

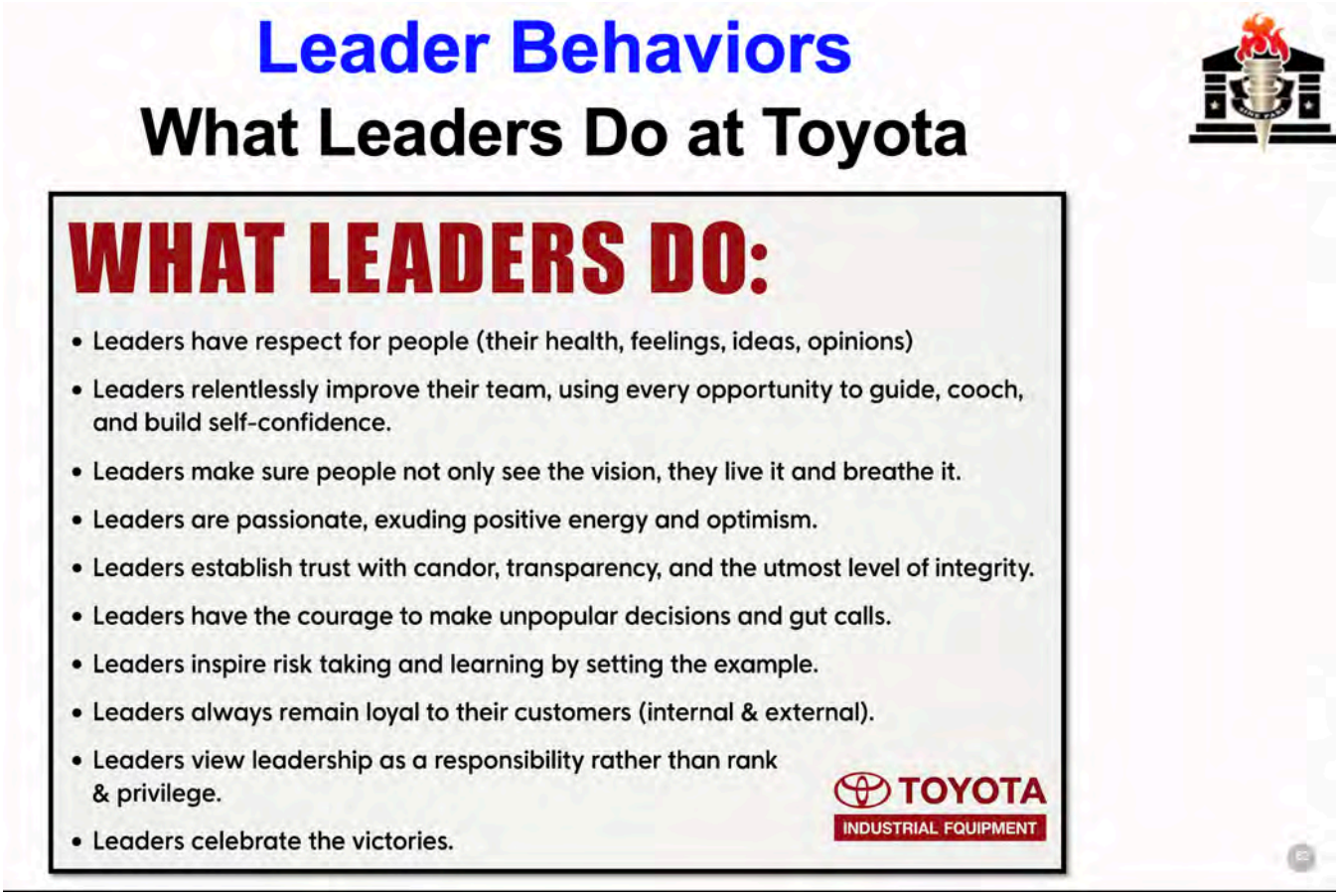
Don't just check in the morning, do a mid-day and end of day check

MAKE PROBLEMS VISIBLE

The Toyota Way of Leadership
Results vs. Behavior

The Toyota Way is Good Results Through Good Leadership




Leader Behaviors
What Leaders Do at Toyota
WHAT LEADERS DO:
• Leaders have respect for people (their health, feelings, ideas, opinions)
• Leaders relentlessly improve their team, using every opportunity to guide, cooch, and build self-confidence.
• Leaders make sure people not only see the vision, they live it and breathe it.
• Leaders are passionate, exuding positive energy and optimism.
• Leaders establish trust with candor, transparency, and the utmost level of integrity.
• Leaders have the courage to make unpopular decisions and gut calls.
• Leaders inspire risk taking and learning by setting the example.
• Leaders always remain loyal to their customers (internal & external).
• Leaders view leadership as a responsibility rather than rank & privilege.
• Leaders celebrate the victories.
TOYOTA
INDUSTRIAL EQUIPMENT

NOTES:

NOTES:

NOTES:

TOYOTA ELECTRIC TRUCKS

Core Electric
Turret model available

Large Electric

3-Wheel Electric

Stand-Up Rider

48V & 80V Electric Pneumatic

High Capacity Electric Cushion

Order Picker
Furniture model available

Reach Truck
Multidirectional, high capacity moving mast & indoor/outdoor models available

Electric Walkie

Large Electric Walkie Pallet Jack

End-Controlled Rider Pallet Jack

Enclosed End Rider Pallet Jack

Center-Control Rider Automated Forklift
Center Control Rider Pallet Jack available

Low Level Order Picker

Walkie Stacker

Industrial Walkie Stacker

Counter-Balanced Stacker

Walkie Reach Truck

Core Tow Tractor

Mid Tow Tractor

Large Tow Tractor

TORA-MAX

Electric Walkie Pallet Jack

Compact Electric Walkie Pallet Jack

TOYOTA IC TRUCKS

Core IC Cushion

Large IC Cushion

High-Capacity Cushion

High-Capacity Large Cushion
Adjustable Wheelbase model available

Paper Roll Special

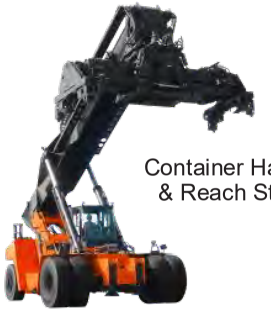
Box Car Special

Core and Mid IC Pneumatic

Large IC Pneumatic

High Capacity CORE IC Pneumatic

High Capacity IC Pneumatic
Marina model available



Container Handlers & Reach Stackers

TOYOTA EXPERIENCE

TOYOTA MATERIAL HANDLING AN UNFORGETTABLE DAY!

TOYOTA Material Handling

TOUR OF THE PLANT

Website:
https://www.toyotaforklift.com/

Plant Info:

Toyota has assembled forklifts in Columbus, Indiana since 1990, supplying North America from its flagship manufacturing campus. In May 2024 the company broke ground on a nearly $100 million expansion to add a dedicated factory for electric forklifts, underscoring its long-term U.S. manufacturing commitment. The Columbus campus also houses the company's headquarters. Across the NAFTA (USMCA) region, Toyota Material Handling has been the No. 1-selling forklift brand since 2002; together with sister brand Raymond, TMHNA accounts for roughly one in three forklifts sold in North America.

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

INFO:

Toyota opened their world-class Columbus, Indiana plant in 1990, which has produced over 500,000 forklifts.

Totaling more than a million square feet on 126 acres, this Columbus location houses Toyota's National Headquarters, manufacturing, Training Center and distribution hub for forklifts and parts.

DAY 2

A DAY AT TOYOTA

TOYOTA
MATERIAL HANDLING

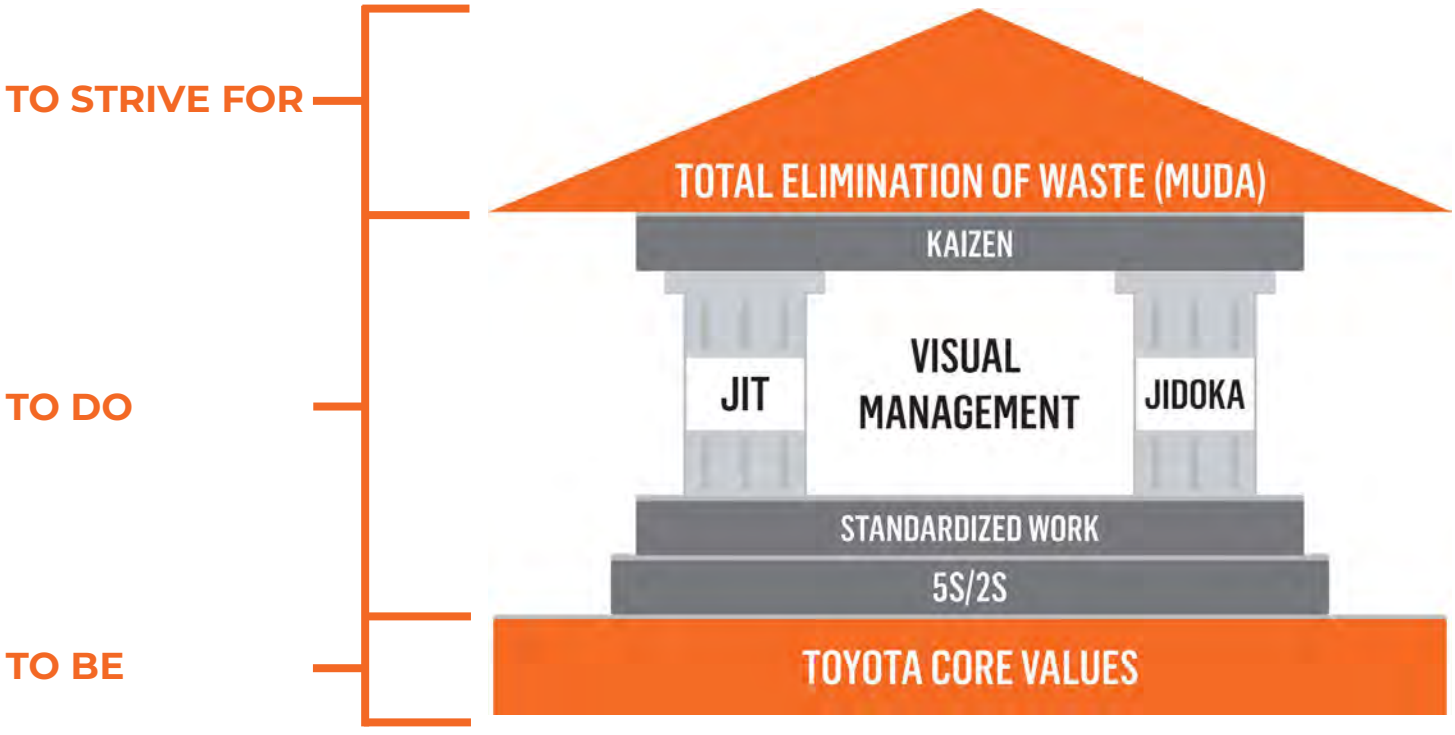
"The key to the Toyota Way and what makes Toyota stand out is not any of the individual elements... What is important is having all the elements together as a system. It must be practiced every day in a consistent manner - not in spurts."

Taiichi Ohno, the Father of the Toyota Production System

THE TOYOTA HOUSE OF LEAN:

Lean management is a cultural change that can only be implemented in your business with focused effort and susstained practice over time. It's like building a house. And Toyota's tried and true Lean management pracrtice is aimed at building the Toyota House - where total elimination of waste is supported by important key values and practices.

The bedrock of the Toyota House are the "Toyota Core Values", as goals for what the organization aspires to be That vision of what you are trying to be guides the construction of the remaining parts - those things you want to do in order to achieve what you want to be.



TOYOTA PRECEPTS (CORPORATE CREED) - CORE VALUES

Building an effective "House" of Lean Management requires durable bedrock that can support the growth and empowerment of people to achieve success. At Toyota, they have practed their Core Values in earnest for nearly 100 years; they uphold their success and set us soundly on their path to eliminate waste.

ALWAYS BE FAITHFUL TO YOUR DUTIES thereby contributing to the company and to the overall good

ALWAYS BE STUDIOUS AND CREATIVE striving to stay ahead of the times

ALWAYS BE PRACTICAL and avoid frivoiousness

ALWAYS STRIVE TO BUILD A HOMELIKE ATMOSPHERE at work that is warm and friendly

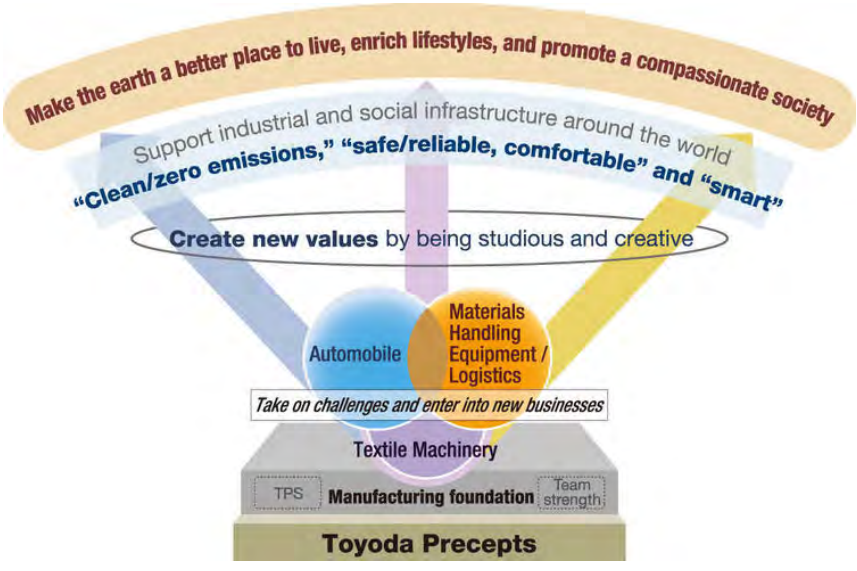
ALWAYS HAVE RESPECT FOR GOD and remember to be grateful at all times

TOYOTA 2030 VISION

Toyota is always adusting their long term strategic vision and connecting it to their Hoshin Kanri planning. Below is their 2030 Vision and their model of bringing this throughout TICO (Toyota Industries Corporation)

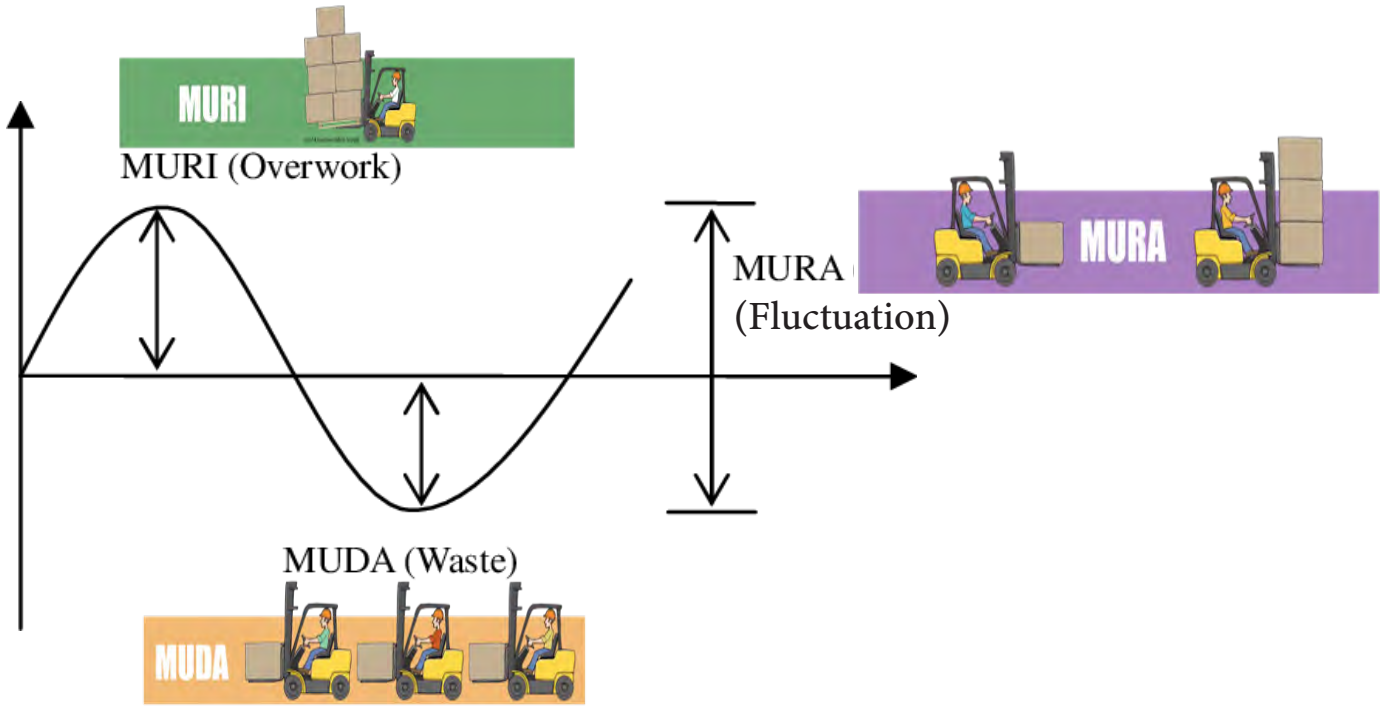
Contribute to making the earth a better place to live, enrich lifestyles, and promote a compassionate society by supporting industrial and social infrastructure around the world through the continuous supply of products/services that anticipate customers' needs.

TOYOTA VISION 2030



5S TO ELIMINATE WASTE

With values firmly established, a business can focus on installing the building blocks that support the elimination of waste. Before building the Lean Management System, you need to know what kinds of waste you're looking for. In Japanese there are three kinds of waste:



5S FOR CONTINUOUS IMPROVEMENT

5S is more than simple housekeeping, it is vital to business success. When implemented as part of your enduring business makeup by helping your people recognize and correct visual abnormalities in your process work flow. It serves as the foundation of the Toyota House of Lean.

1. SORT REMOVE THE UNNECESSARY ITEMS FROM THE WORK AREA

2. SYSTEMATIZE ORGANIZE ITEMS TO SUPPORT THE FLOW OF WORK

3. SHINE CLEAN SO PROBLEMS CAN BE IDENTIFIED AS YOU WORK

4. STANDARDIZE SHARE PROCESSES TO GAIN POSITIVE RESULTS

5. SUSTAIN MAINTAIN CONSISTENCY AND STRIVE FOR CONTINUED IMPROVEMENT

STANDARDIZE YOUR EFFICIENT PROCESSES

Standardizing work relies on three elements: Standard Materials, Working Sequence, and Takt Time. Control over what you are using, how you are using it, and the cadence of completing the process is critical to improvement

"Without a standard, there can be no improvement."

Taiichi Ohno, the Father of the Toyota Production System

JUST-IN-TIME (JIT)

One of the pillars of the Toyota House of Lean, Just-in-Time is the conveyance and delivery of just the right amount of materials to complete the job at just the right time. The optimal approach is one item, used immediately for one need, eliminating any work outside of the standard. To achieve Just-in-Time production, you must first achieve Level Work (Heijunka). Level work is the overall leveling in the production schedule of the variety and volume of items/work produced in a given time period.

JIDOKA (AUTOMATION WITH A HUMAN TOUCH)

Jidoka requires that when adnormalities are discovered in a product or production, any problems with automated processes be stopped until the cause is resolved. Jidoka empowers all employees to be quality controllers. The key practice of Jidoka is for employees to use the

"Stop. Call. Wait." Method:

STOP — **Employees are required to stop a process when they notice an abnormality**

CALL — **Employees are required to call for help in resolving the issue**

WAIT — **Employees are required to wait on supervisor assistance before proceeding**

The value of this approach is that the best quality should be the focus of any organization. If you don't correct quality flaws immediately, everything you produce will carry that flaw. Get to the root cause, solve the issue. IF a work around is necessary to get you back on track, don't standardize it, but revisit it as soon as possible and deep dive to grasp the situation, understand the root cause, and solve it so that proper Kaizen can occur.

"The production line that never stops is either excellent or terrible."

Taiichi Ohno, the Father of the Toyota Production System

VISUALIZATION - YOU CAN'T MANAGE WHAT YOU CAN'T SEE

Visualization or Visual Management is the window in the Toyota House of Lean. Visualization ensures everyone has the same understanding. This has a deeper meaning than shared goals. It means openly displaying the current condition of Key Performance Indicators (KPIs) versus the goals to accelerate improvement. KPIs are available where all employees can visually assess them together - so that everyone can see problems and take action with greater velocity. We see together, we learn together, we take action together.

EXAMPLES OF VISUAL MANAGEMENT

- 2S/5S, Shadow Boxes, Color Coding
- Standard Work Instructions
- Obeya Room
- Key Performance Indicator (KPI) Tree
- Daily Win/Loss Display for Safety, Quality, and Productivity
- Kamishibai Visual Audit System
- Andon or Production Scoreboards
- Floor Management Development System (FMDS) Boards
- PDCA Boards
- Week Point Management

GENCHI GENBUTSU

What's the key to visualization? You can't always do it from behind a desk. Genchi Genbutsu means, "Go & See." By investigating this issue in person and, ideally, with a group of people, you can quickly imporve shared understanding and can quickly improve shared understanding and communication of the curerent condition, with the intention of reducting waste and closing gaps in the process.

1. **WHEN A PROBLE ARISES, GO TO THE WORKPLACE FIRST**
DON'T TRY TO MAKE A DIAGNOSIS ON THE PHONE

2. **CHECK THE PROCESS (INVOLVE ALL STAKEHOLDERS)**
BECAUSE SEEING IS BELIEVING

3. **TAKE TEMPORARY COUNTERMEASURES ON THE SPOT**
TO ULTIMATELY RESOLVE THE PROBLEM

4. **IDENTIFY THE ROOT CAUSE OF**
THE PROBLEM AT HAND

5. **LASTLY, STANDARDIZE THE PROCESS**
TO AVOID AN UNWANTED RECURRANCE

"It should take you hours to walk 100 meters each time you enter the factory. If it takes you no time at all to walk 100 meters, that means no one is relying on you."

Taiichi Ohno, the Father of the Toyota Production System

KAIZEN: THE DEDICATION TO CONTINUOUS IMPROVEMENT

The ceiling in the Toyota House of Lean is an undying dedication to innovation and evolution. Kaizen. It means continuous improvement. It's the realization that no process can ever be declared perfect, but can always be improved. If you adopt the spirit of continuous improvement, then you understand that your Lean journey is never over and that you can always improve.

CHANGE (FOR) GOOD

When Kaizen is a part of your company culture, you'll realize that Kaizen doesn't always have to be a company-wide initiative. Kaizen is about small, incremental changes that helps people develop and process improve. Kaizen is to be carried out by everyone, everywhere, every day. A Kaizen Culture is a Learning Culture. Kaizen uses scientific thinking as a way of identifying problems, finding the root cause, and implementing solutions. Kaizen extends past self to exemplify respect for people.

> ***"Kaizen ideas are infinite.... Once you learn how to pick up the sprouts of Kaizen ideas it is important to have the attitude in our daily work that just underneath one Kaizen idea is yet another one."***
>
> **Taiichi Ohno, the Father of the Toyota Production System**

THE TOTAL ELIMINATION OF WASTE

The roof of the Toyota House of Lean points us to the ultimate goal of solving problems both big and small for the total elimination of waste. As we eliminate waste, quality increases. An increase in quality is Value-Added for the customer. Thus, the heart of Lean is focusing on the Adding Value to the Customer through the elimination of waste.

By following the principle of Kaizen, we know that every process, product, and service can and should be improved. The ideal state, the roof of the House of Lean, is the total elimination of waste. Toyota recognizes 8 basic categories of waste (but before arguing about if there are 7 or 8 types of waste, consider this quote from Taiichi Ohno:

> ***"Waste is not limited to seven types... So, don't bother thinking about 'what type of waste is this?' Just get on with it and do Kaizen."***
>
> **Taiichi Ohno, the Father of the Toyota Production System**

NOTES:

NOTES:

NOTES:

NOTES:

NOTES:

Chartering to Win

Use Leadership Commitment to Set Your Teams Up for Success

VoC Session Survey

Adam LAWRENCE

Kaizen Ninja
Founder of Process Improvement Partners, LLC.

Email: **atlawrence@pi-partners.com**

Website: **www.pi-partners.com**

LinkedIn: **adam-t-lawrence**

Speaker Bio:

Adam Lawrence is the creator of The Wheel of Sustainability and a recognized expert in applying Kaizen and continuous improvement principles to real-world business challenges. As the founder of Process Improvement Partners LLC, Adam partners with leaders and teams across manufacturing, distribution, service industries, and government agencies to drive sustainable, breakthrough results. With decades of hands-on experience, Adam coaches, mentors, and facilitates teams to embed problem-solving capabilities that stick, empowering organizations to reduce waste and improve performance, creating lasting value for their communities and stakeholders. Based in Lancaster, PA, Adam works globally while staying grounded with his family — his wife and son (his Board of Directors).

Session Summary:

Too many teams are launched without clear direction, leading to wasted time, poor results, and low morale. In this workshop, you'll learn a practical chartering process that builds alignment, speeds execution, and improves outcomes. Give your teams the clarity and support they need to win—before the work even starts.

Key Takeaways:

- The four essential elements of a powerful charter
- How to build a charter that gives teams purpose, clarity, and backing
- A model you can apply immediately to any project or Kaizen event

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

Continuous improvement should be so easy and so engaging that everyone wants to participate. Don't overcomplicate it – it's like bowling, anyone can do it.

Kaizen is messy – be flexible and ready to zig and zag to meet the needs of the team.

Don't let best get in the way of better. Try something, learn from it, and then improve it. No time to wait or waste.

Go to Gemba – the answers are in the Gemba, not in a meeting room.

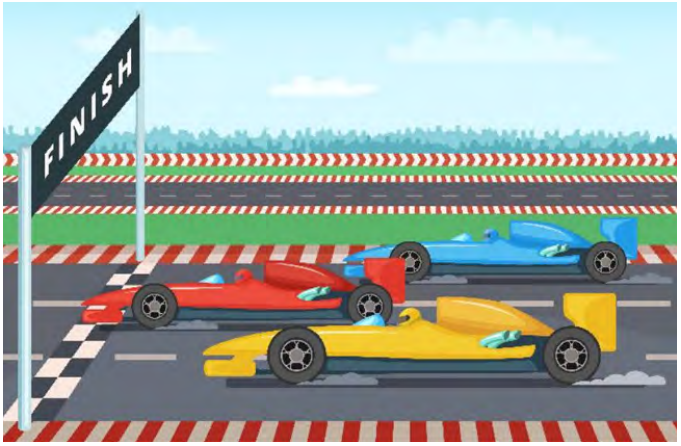
Chartering to Win

The system that sets up Kaizen and project teams for a winning experience.

Problem Statement

Find the pain and identify the impact of solving the problem.

Use data, not emotion, to create a compelling case for change.



Objectives

Objectives should be challenging, easy to measure, and time-bound. We want to be able to clearly identify if the team has won.

Safety objective(s) should be included.

The Team

Choose team members who care about the problem, have experience with it, and want to fix it.

Clear the schedule for 100% focus.

The Team Leader

Responsible for the problem and content. Is not the facilitator.

Owns the output of the Kaizen event or project. Responsible for complete implementation and sustainment of solution(s).

Chartering Questions

Element	Questions to ask
Problem Statement	• What is the specific problem you wish to solve? • How does this problem manifest itself? • What are the reason(s) for solving this problem? When does it need to be solved by? • What is the impact on the customer(s), employee(s), business? Can we monetize the problem? • What's the scope? What's out of scope?
Objectives	• If we solved the problem during the Kaizen event, what would be the evidence of solving it? • Are there some clear, measurable objectives that would allow the team to know that the problem has been solved? • Are the objectives challenging enough to drive the team beyond the known solutions? • Have we cut the pain in half or more? • Is there a monetary value for any of these objectives? When should we solve it by? • Are we requiring a sustainable managing system for the Kaizen solutions? Safety?
Team Members	• If you could have a "Dream Team" to solve the problem, who specifically would you choose? • Have we included people that directly deal with the problem every minute of every day? • Have we included customers and suppliers of the process we want to improve? • Is there an outsider, or "Wild Card" team member that we should include? • Is everyone willing to "clear their schedule" to give their undivided attention to the Kaizen?
Team Leader	• Who owns the output of the Kaizen? • When the Kaizen is over, who will be accountable to ensure that the solution is implemented successfully?

NOTES:

NOTES:

Value Stream Mapping

Visualize the Customers Journey to Drive Breakthroughs

VoC Session Survey

Adam LAWRENCE

Kaizen Ninja
Founder of Process Improvement Partners, LLC.

Email: **atlawrence@pi-partners.com**

Website: **www.pi-partners.com**

LinkedIn: **adam-t-lawrence**

Session Summary:

Want to drive change that matters?
Start by seeing your process through your customer's eyes. In this fun, engaging session, you'll learn how to quickly map out a process, expose waste, and generate breakthrough ideas. You'll never look at making a peanut butter and jelly sandwich the same way again.

Key Takeaways:

- The difference between process mapping and value stream mapping—and why it matters
- How to use value stream mapping to reveal hidden waste
- The quickest, easiest way to build a value stream map and unlock new thinking

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

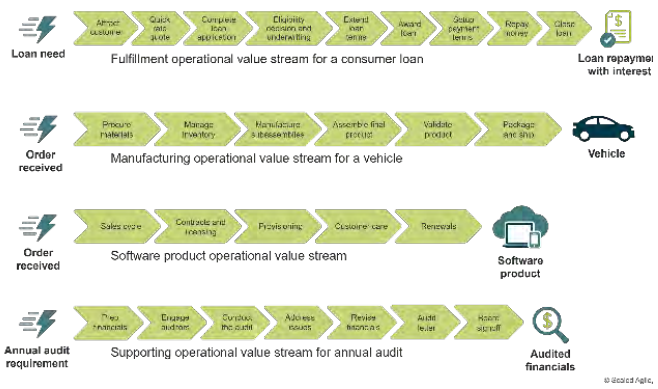
Focus on improving the processes that will maximize impact to the Customer

Strategically plan improvements for the coming years

Leverage our resources and the creativity of our people

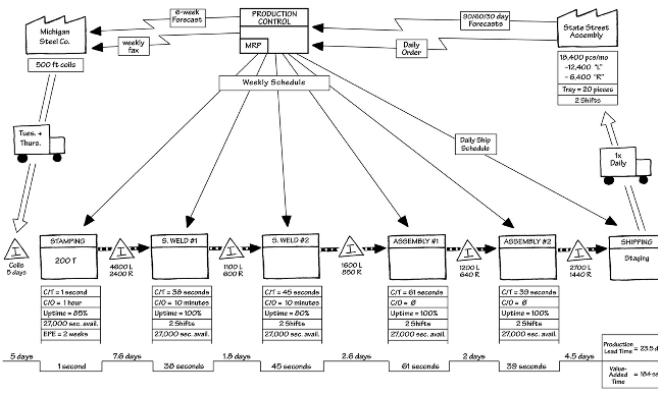
Reinforce and accelerate the Continuous Improvement Journey

Value Stream Mapping



What is a Value Stream?

The sequence of actions an organization undertakes to deliver a product or service to a customer, from initial concept to customer receipt. It encompasses all the steps, both value-added and non-value-added, that are necessary to bring a product or service into the hands of the customer.



What is Value Stream Mapping?

A technique used to visualize, analyze, and improve the flow of materials and information needed to deliver a product or service to a

Value Stream Mapping

What is a Work Unit?

*The **"thing"** that is created that delivers value to the customer.*

*Examples of **Work Units** = Bottle of Laundry Detergent, new product development process, pick-up truck.*

***Value** is created when the **"thing"** changes form or function in a way that the customer would pay for.*

Value Stream Mapping Steps:

1. Identify unit of value to map - the **Work Unit**
2. Place Customers and Suppliers on the Map. What output(s) do Customers value?
3. Map all steps the unit(s) of value go through from Supplier to Customer
4. Identify Value Adding (VA) and Non-Value Adding (NVA) steps from the perspective of the Customer. All wait steps and meetings are NVA. All GIP/inventory is NVA
5. List critical communications or steps
6. Show decision points
7. Calculate VA to NVA ratio
8. Perform gap analysis and prioritize top opportunities

Value Stream Mapping (VSM) Thought Process:

Where Are We?	*Where Are The Problems?*	*Where Are We Going?*	*How Do We Get There?*
Data	**Understanding**	**Plan**	**Action**
Current State *Baseline Data*	*"Learning To See"* *Where's The Waste?*	*Future State* *Where Are We Going?*	*Just Do It* *Kaizen* *Six Sigma Projects*

Notes:

Trees Have More Than One Root – Root Cause Analysis

VoC Session Survey

Karil SAMPSON

Director of Process Improvement
Cuyahoga County, Ohio

Email: **Karil.sampson@outlook.com**

LinkedIn: **Karilsampson**

Speaker Bio:

Karil is the Director of Process Improvement for Cuyahoga County, the second largest county in the state of Ohio, USA. He leads the Cuyahoga County Innovation Academy which teaches & promotes Lean Six Sigma methodology.
Karil has worked in the field of process improvement for 20 years. His journey has taken him through property insurance, information technology, academia, medical devices and public sectors. He has made a career of reminding people that complicated systems are made of simple components.

Session Summary:

The 5 Whys (Root Cause Analysis) is a staple tool in Lean problem-solving, valued for its simplicity and accessibility. Yet in practice it is often misapplied, producing shallow or incomplete answers that leave systemic issues unresolved. Problems are rarely fed by a single linear root; they grow from a tangled root system of design flaws, cultural forces, environmental conditions, and human perspectives.
Look beyond the surface and explore the hidden root system beneath recurring issues.

Key Takeaways:

- When using Root Cause Analysis for problem identification include other aspects that will influence your results:
  - Cognitive Bias
  - Perspective Bias
  - Multi-causal factors
- Core principles: systems thinking, multiple causation, evidence-based analysis, bias awareness mitigation, stakeholder inclusion and interative learning. Tools: Fishbone, causal loop, current reality tree.

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

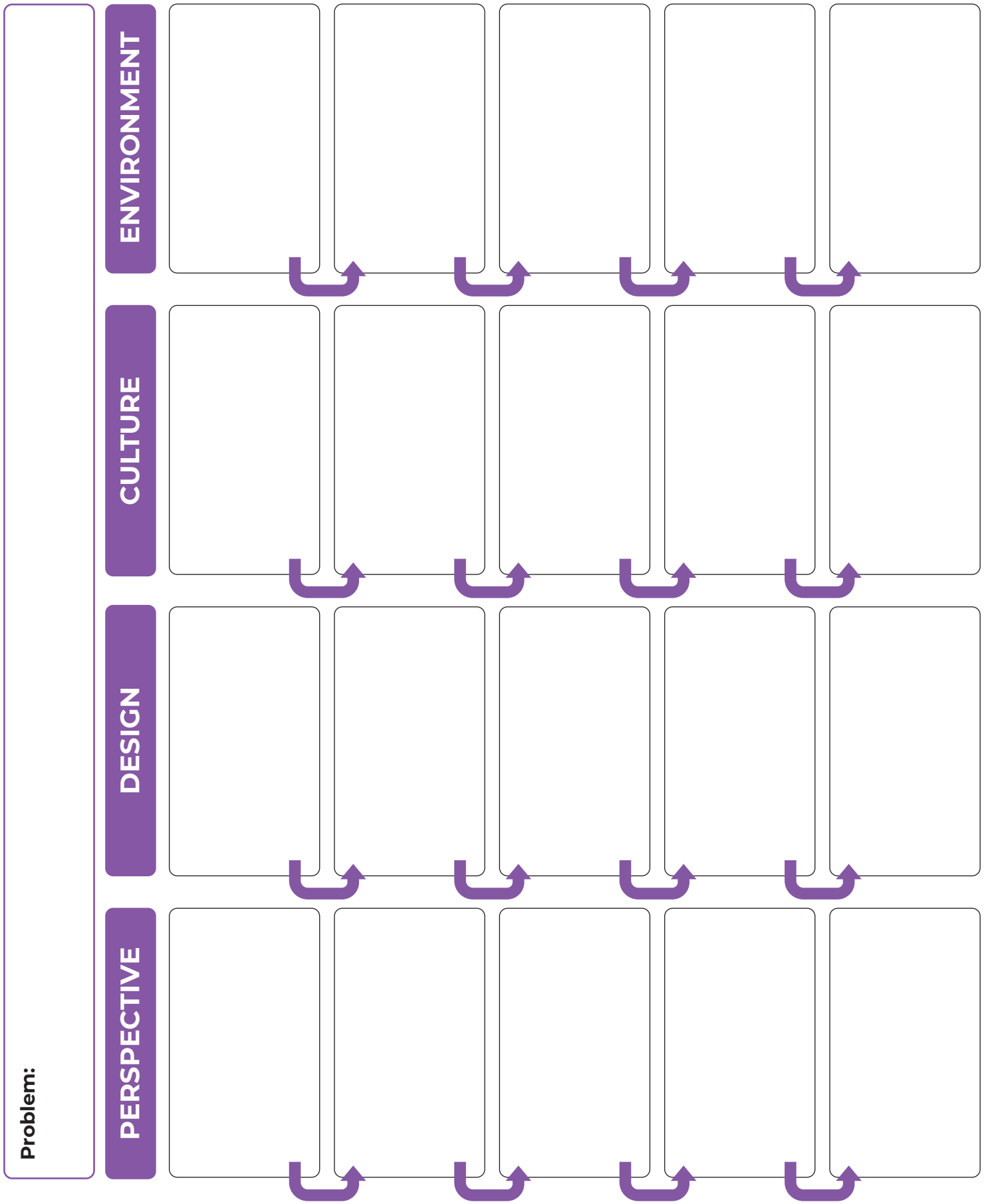
TIPS:

Bias Distorts Root Cause Analysis - Watch out!

Every "Why" should be supported by observable data, not assumptions

Never have a solution before understanding your environment

Solving root causes isn't just about fixing processes — it often means questioning the assumptions, policies, and culture that allowed them to exist.


ENVIRONMENT
CULTURE
DESIGN
PERSPECTIVE
Problem:

NOTES:

NOTES:

Facilitate Like a Ninja

Techniques to Engage, Empower, and Drive Ownership

VoC Session Survey

Adam LAWRENCE

Kaizen Ninja
Founder of Process Improvement Partners, LLC.

Email: **atlawrence@pi-partners.com**
Website: **www.pi-partners.com**
LinkedIn: **adam-t-lawrence**

Session Summary:

Tired of meetings where only a few voices dominate?
This dynamic, hands-on session shows you how to engage every team member, create equal voice, and build ownership of results. Learn techniques drawn from decades of experience and hundreds of Kaizen events around the world—and walk away ready to lead more effective, inclusive sessions.

Key Takeaways:

- The difference between Sponsor, Leader, and Facilitator—and how each contributes to success
- Proven facilitation techniques to spark engagement and build ownership
- How to use these techniques immediately with your own teams

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

Stick to the charter

The team owns the problem - "More them, less you"

Everyone participates with an equal voice

Keep the team moving, time is precious

Bring the energy, Fun drives results

Perfect is the enemy of Good

Role Definitions

Facilitator

Responsible for the process.
Guides the team to the solution.

"More them, less me"

Leader

Responsible for content.
Owns the output of the session.

"I am the tiebreaker"

Sponsor

Owns the business problem.
Visible support for the team.

"The answer is yes, what was the question?"

Facilitation Principles

Stick to the charter

The team owns the problem
“More them, less you”

Everyone participates with
an equal voice

Keep the team moving

Personalize learning

Time is precious

Facilitation Principles

More ideas more better

"Don't let best get in the way of better"

Frequent check-ins

Feed your team

Bring the energy

Fun drives results

Facilitation Techniques

How Post-Its™ help achieve equal voice:

How Mixing it Up drives engagement:

How Getting Out of Your Seat builds energy:

How Going to Gemba reduces preconceived notions:

How “Show Me” questions strengthen engagement and ownership:

How the Long Pause strengthens ownership:

NOTES:

Sustainable Leadership

Drive Lasting Results with the Wheel of Sustainability

VoC Session Survey

Adam LAWRENCE

Kaizen Ninja
Founder of Process Improvement Partners, LLC.

Email: **atlawrence@pi-partners.com**

Website: **www.pi-partners.com**

LinkedIn: **adam-t-lawrence**

Session Summary:

When teams are empowered to solve problems that matter, they achieve incredible results—and love doing it. But how do you keep those results from fading away? This energetic, hands-on session introduces the Wheel of Sustainability: a practical, proven system that helps leaders sustain success long after the event is over.

Key Takeaways:

- How the nine elements of the Wheel of Sustainability ensure long-term success
- Actionable ways to use the Wheel to gain leadership commitment and team engagement
- Real-world stories that show the Wheel in action—simple, relatable, and effective

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

Ownership at the right level is the Secret Sauce to Sustainability!

It's about the WHY not the 'What' - Align the Vision

Learn Training Within Industry (TWI) Tell • Show • Do

Follow the 20-Foot Rule

Immediately correct and/or reinforce behavior

Establish clear benefits, to make things simpler, safer, and less stressful

The Wheel of Sustainability

The system that engages and empowers teams to ensure their solutions live on.

Leadership Commitment

Leaders visibly commit to help, support, and provide everything necessary to give their teams a winning experience.

Notification

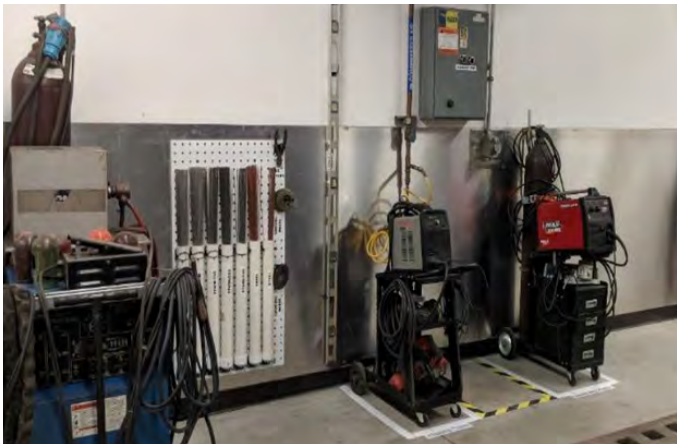
*Change is shared with the organization in a compelling way. Priority is given to the **WHY** of the change over the **WHAT** of the change.*

Training and Review

Knowledge and expectations are transferred in a way that demonstrates understanding, caring, capability and commitment to follow the changes as designed.

Visible Evidence

Allows anyone to assess the health of a system and makes it almost impossible to do the wrong thing.

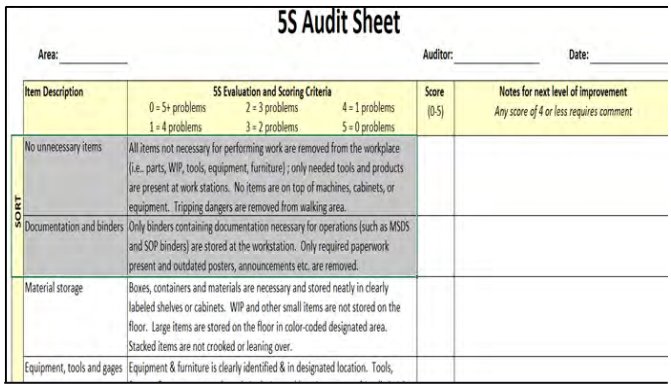


All Tools Available

Provides everything necessary to accomplish work in the safest, lowest stress, and most productive way.

Clear Benefits

Those applying the changes must see them as simpler, safer, less stressful, and more logical in order to fully adopt them.



5S Audit Sheet

Area: _____ Auditor: _____ Date: _____

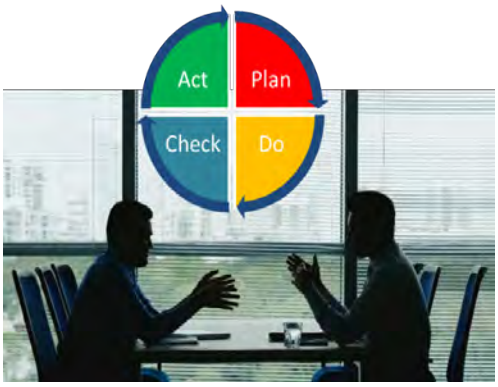
	Item Description	5S Evaluation and Scoring Criteria 0 = 5+ problems 2 = 3 problems 4 = 1 problems 1 = 4 problems 3 = 2 problems 5 = 0 problems	Score (0-5)	Notes for next level of improvement *Any score of 4 or less requires comment*
SORT	No unnecessary items	All items not necessary for performing work are removed from the workplace (i.e., parts, WIP, tools, equipment, furniture); only needed tools and products are present at work stations. No items are on top of machines, cabinets, or equipment. Tripping dangers are removed from walking area.		
	Documentation and binders	Only binders containing documentation necessary for operations (such as MSDS and SOP binders) are stored at the workstation. Only required paperwork present and outdated posters, announcements etc. are removed.		
	Material storage	Boxes, containers and materials are necessary and stored neatly in clearly labeled shelves or cabinets. WIP and other small items are not stored on the floor. Large items are stored on the floor in color-coded designated area. Stacked items are not crooked or leaning over.		
	Equipment, tools and gages	Equipment & furniture is clearly identified & in designated location. Tools,		

Layered Audits

Engage with those doing the work to ensure it is done properly and well understood. Auditors immediately provide help and support when faced with deviations from standard.

Accountability

When there is a deviation from standard, leaders immediately step in to understand why, offer help, and correct the situation and behavior.



Recognition

Sharing stories of success. Understanding cause and effect helps people make the connection between the changes and improved results, locking in their commitment.

NOTES:

FLIGHT DECK: A Lean Operating Model to Drive Operational, Financial and Customer Outcomes

Phil WICKLER

Chief Transformation Officer - GE Aerospace

Email: **Phil.Wickler@geaerospace.com**

LinkedIn: **philip-wickler-12609ba**

VoC Session Survey

Speaker Bio:

Phil Wickler is Chief Transformation Officer at GE Aerospace, accountable for EHS, FLIGHT DECK, Scope 1 & 2 sustainability, global facilities, and transformation. He previously served as VP, Global Supply Chain and Manufacturing Operations. Since joining GE in 1995, Phil has held roles across GE Lighting and GE Aerospace, including Six Sigma Black Belt, plant manager, NPI leader for Commercial Engine Services and product operations director for the CF34 engine family. He later led strategy and product management for CF6, our global risk and revenue sharing partnerships, and our aftermarket portfolio of CF6 and GEnx services agreements. He then ran GE Aerospace's largest P&L comprised of commercial aftermarket materials services. Phil holds a B.S. in Industrial Engineering from Illinois and an MBA from Xavier. He serves on the boards of the Cincinnati Regional Chamber, Dan Beard Boy Scout Council and Asbury Carbons.

Session Summary:

This session will explore how GE Aerospace is using FLIGHT DECK, our lean propriety operating model, to turn strategy into operational and financial outcomes as well as strategic breakthroughs, while advancing our culture.

Key Takeaways:

- Understand the core principles of FLIGHT DECK and how it's used to turn strategy into results.
- Learn the difference between Behaviors and Fundamentals and how they are used to drive culture change.
- Identify and address common barriers when implementing lean methodologies.
- Apply strategies and practices that can help your organization fundamentally re-think operations in a new, leaner manner.

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

Be clear on the "why"

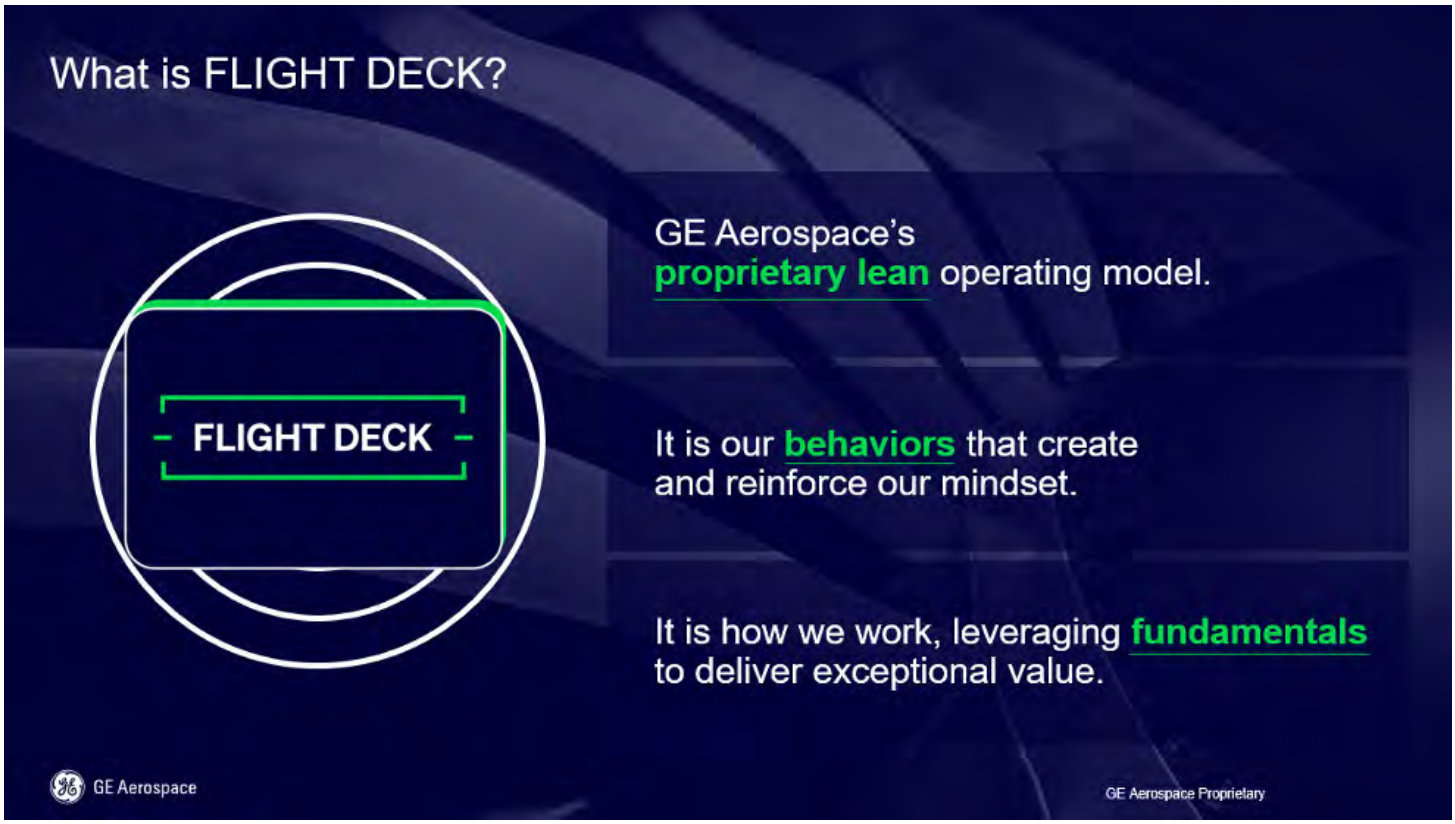
Must be leader led... from the top, all functions, conviction vs. compliance... it is how the company runs.

Learning through doing... frequent reps with high quality coaches at "best of best" sites / functions.

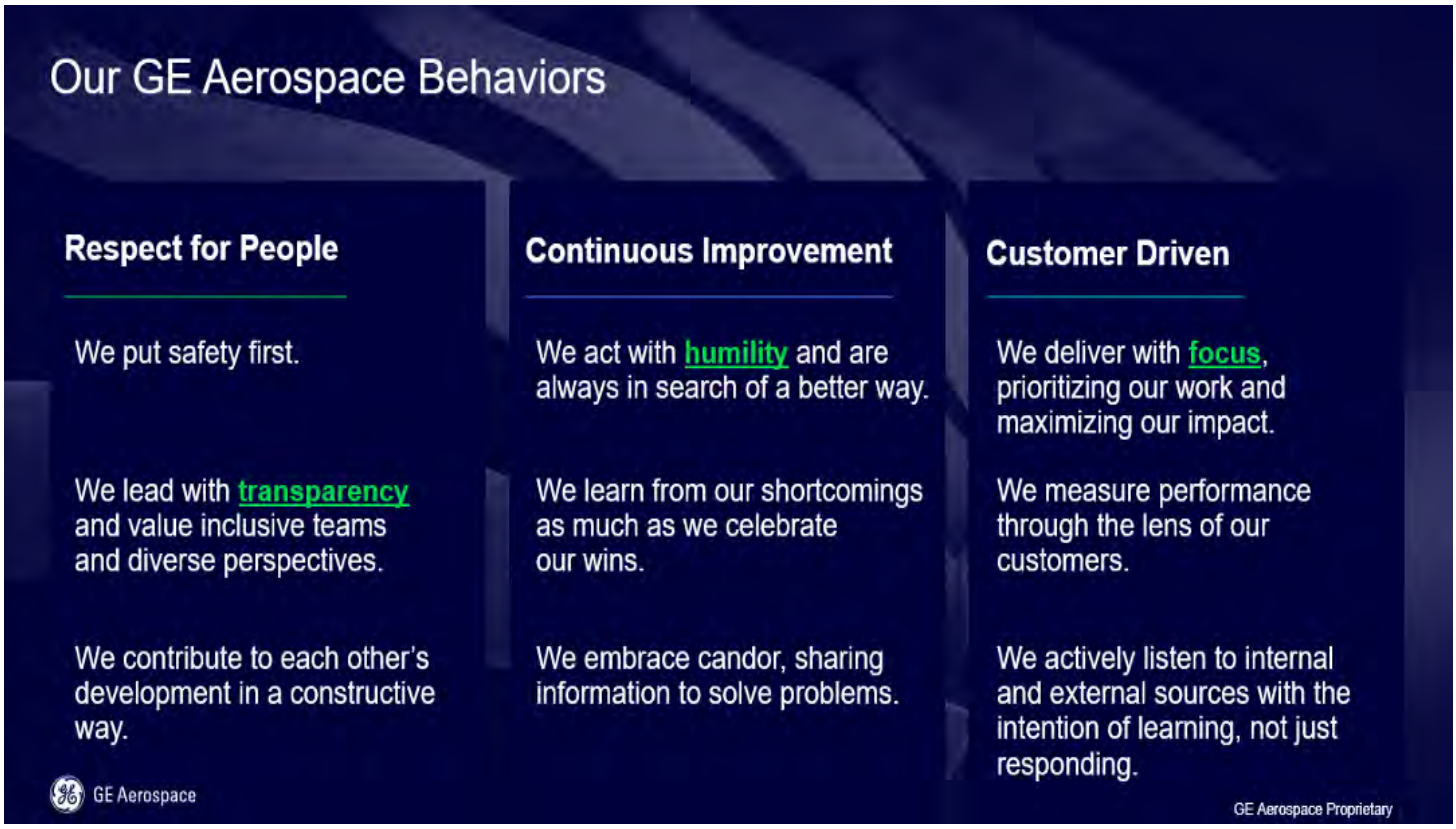
Value stream orientation... eliminates silos, prioritizes effort, next-operator-as customer focus.

Always go to Genba... in the DNA or a Japanese word?

Ignite continuous improvement culture... frequent high-quality kaizens, led from front-line teams.


What is FLIGHT DECK?
FLIGHT DECK
GE Aerospace's proprietary lean operating model.
It is our behaviors that create and reinforce our mindset.
It is how we work, leveraging fundamentals to deliver exceptional value.
GE Aerospace
GE Aerospace Proprietary


Systematic approach to running our company
TODAY
Ramping services and equipment
TOMORROW
Expanding capacity and capabilities
FUTURE
Inventing the future of flight
FLIGHT DECK
Behaviors + Fundamentals
CULTURE
Operational results
Financial performance
Breakthroughs (Hoshin Kanri)
GE Aerospace
GE Aerospace Proprietary


Our GE Aerospace Behaviors
Respect for People
We put safety first.
We lead with transparency and value inclusive teams and diverse perspectives.
We contribute to each other's development in a constructive way.
Continuous Improvement
We act with humility and are always in search of a better way.
We learn from our shortcomings as much as we celebrate our wins.
We embrace candor, sharing information to solve problems.
Customer Driven
We deliver with focus, prioritizing our work and maximizing our impact.
We measure performance through the lens of our customers.
We actively listen to internal and external sources with the intention of learning, not just responding.
GE Aerospace
GE Aerospace Proprietary


– FLIGHT DECK – fundamentals
– Standard Work
– Action Planning
– Daily & Visual Management
– Problem Solving
– Value Stream Management
– 5S
– Operating Cadences
– Flow/Pull
GE Aerospace
GE Aerospace Proprietary

NOTES:

NOTES:

NOTES:

CITY Furniture
Implement Lean Systems Thinking with Heart, A True Lean Transformation Story

Andrew KOENIG
CEO - CITY Furniture

Email: **andrewk@cityfurniture.com**

Phone: **954-829-4385**

LinkedIn: **andrewkoenifcf**

VoC Session Survey

Speaker Bio:

Andrew Koenig is CEO of CITY Furniture, a Florida-based home furnishings retailer. He started at CITY in 2006 unloading containers and working across the business. He holds a Finance & Accounting degree from Elon and an MBA in Entrepreneurship from Nova Southeastern. After studying Lean at Toyota's headquarters in Japan, he launched the CITY Furniture Operating System (CFOS) in 2007. Under his leadership, CITY became one of the few retailers formally partnered with the Toyota Supplier Support Center, advancing customer experience, associate engagement, safety, sustainability, and profitability. Andrew helped establish the company's 5% Giving Pledge and 2040 Green Promise. He chairs CEOs Against Cancer–Florida and Junior Achievement of South Florida and serves on multiple nonprofit and business boards. A lifelong Floridian, he enjoys time with his wife, Deana, and their three children.

Session Summary:

CITY Furniture's Lean journey started with people, not tools or tactics. What began as a push for efficiency became a companywide culture grounded in the Toyota Production System. From showrooms to distribution centers, associates use Lean to spot waste, solve problems, and elevate the customer experience. We adopted Standard Work, TWI, Daily Kaizen, and Visual Management—not as checklists, but as respect in action and a path for growth. The results: better quality, faster flow, stronger engagement, and higher profitability. This session shares how a family business built the CITY Furniture Operating System (CFOS) from the ground up—and became one of retail's most agile, innovative players.

Key Takeaways:

- How a people-first culture enabled CITY's Lean transformation—from warehouse to boardroom.
- Practical practices you can reuse now: Daily Kaizen and Visual Management, adapted to your context.
- How TWI (Training Within Industry) builds skills, consistency, and leadership at every level
- How to design your own CFOS to align people, processes, and purpose.
- Lessons to start small, scale thoughtfully, and sustain momentum in a family-business setting.
- Why Lean is not a project but a lifelong way of working—and how to live it.

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

Read Every Lean Book You Can

Network with every True Lean Implementer You Can

Attend Every Lean Conference You Can

Then, Get to Work Implementing Lean

CITY FURNITURE

OUR VISION

To be the ultimate home store.

OUR MISSION

To provide quality home furnishings, at excellent values, in an exciting and fun environment.

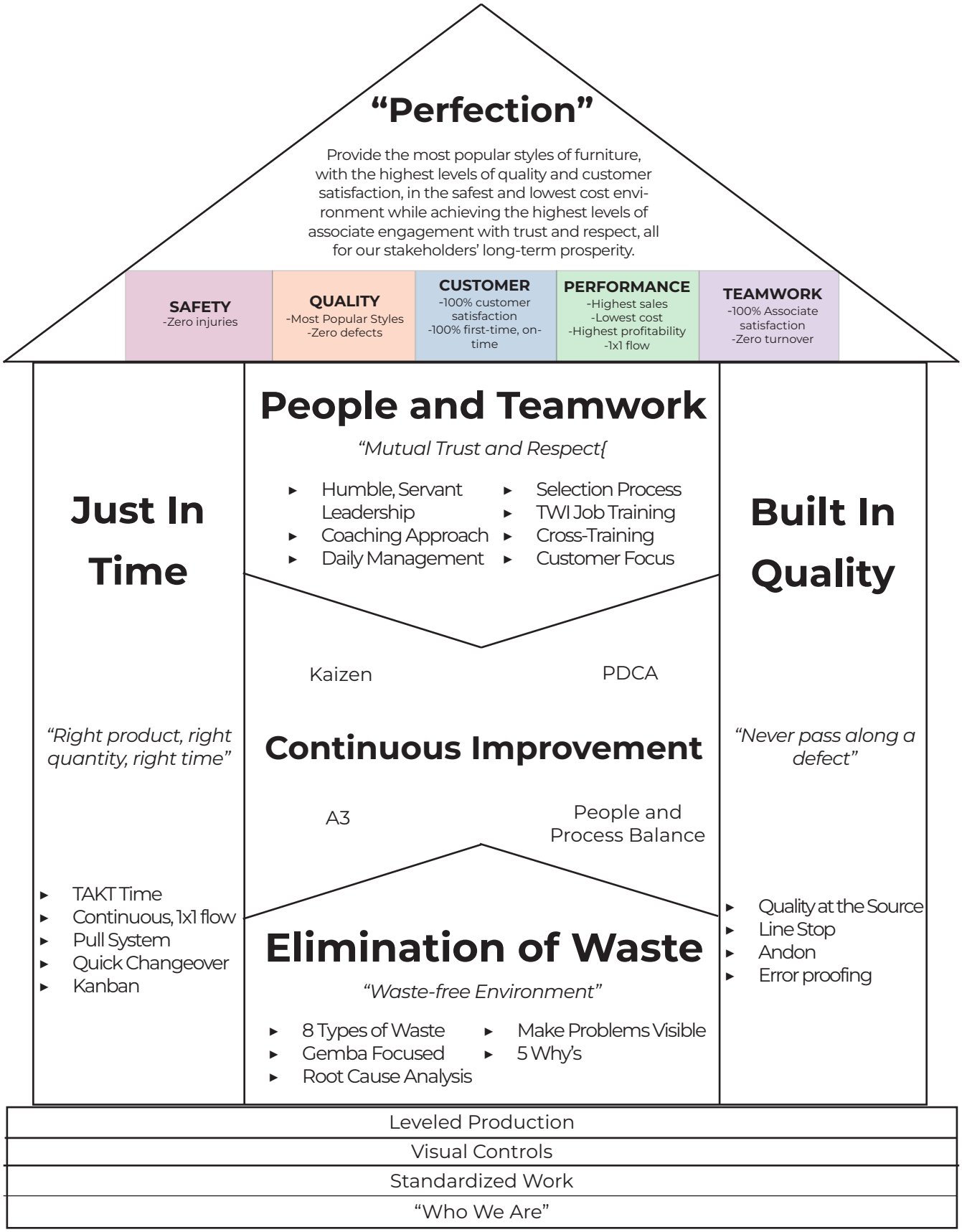
OUR PURPOSE

To enrich people's lives and make the world a better place.

VALUES:

1. Entrepreneurial Spirit
2. Family Spirit
3. Mutual Trust & Respect
4. Teamwork
5. Customer
6. Continuous Improvement
7. Giving Back

CITY Furniture Operating System (CFOS)



NOTES:

NOTES:

NOTES:

Lean Panel Discussion

Adrian SINGLETON

Global VP, Continuous Improvement & Productivity
Watts Water Technology

Email: **Adrian.singleton@wattswater.com**
Phone: **803-415-2939**
LinkedIn: **adriansingleton**

Speaker Bio:

Adrian Singleton is the Global Vice President of Continuous Improvement & Productivity at Watts Water Technologies, with 24 years of experience leading global operational excellence. He previously served as Executive Vice President with Regal Rexnord, held leadership roles at Thomas & Betts/ABB, and worked as a consultant with NLP. Adrian leverages the 80/20 principle as a growth tool to drive transformation, focusing on the initiatives that create the greatest impact. Guided by his P2 philosophy—People, then Process—he empowers teams, embeds Lean and Six Sigma practices, and delivers sustainable results through culture, strategy, and execution.

Antonio DEPAOLO PhD

VP of Transformation and Continuous Improvement
University of Maryland Medical System

Email: **awdtml@msn.com**
Phone: **443-377-0333**
LinkedIn: **antonio-depaolo-phd-611aa314**

Speaker Bio:

Antonio DePaolo, BSIE, MIE, PhD, is VP of Transformation & Continuous Improvement at UM Upper Chesapeake Health. He has 25+ years leading system change across industries, led CI at Wabash National, where he earned the U.S. Senate Productivity Excellence Award. He has also implemented TPS at Sheppard Pratt, co-authored the book, “Transforming Mental Healthcare”, and is a Baldrige Executive Fellow and has Lean, Six Sigma, and Kepner-Tregoe certifications.

Christopher CARPENTIER

Continuous Improvement ManagerChurch & Dwight Co., Inc.

Email: **christopher.carpentier@churchdwight.com**
Phone: **913-775-2784**
LinkedIn: **christopher-carpentier**

Speaker Bio:

Christopher D. Carpentier is the Continuous Improvement Manager at Church & Dwight (Harrisonville, MO). He brings 30+ years of operational leadership, including 25 years in the U.S. Army, retiring as a Lieutenant Colonel in the Military Police Corps. Chris has led deployments of Lean, Six Sigma, TPM, and TWI as a Logistics Manager and CI leader. He holds a B.S. from Stephen F. Austin State University, and a Masters degree from Webster University, and a postgraduate Lean Six Sigma certificate from the University of Massachusetts Amherst.

UMMS Strategic Plan

UMMS HRO Framework

NOTES:

NOTES:

WORKSHOP

Designing Your Organizational Lean Roadmap for Lasting Change

VoC Session Survey

Jared THATCHER

Host of the
Global Lean Summit

Email:
thatcher.jared@globalleansummit.com

Website:
www.globalleansummit.com

LinkedIn:
jaredthatcher

Speaker Bio:

Jared Thatcher is the host of the Virtual and Global Lean Summits. He has consulted with companies like Daimler Trucks, Alaska Airlines, Nike, Mercy Corps, and many others to implement Lean & Agile into their organizations, helping contribute in excess of over $1 billion in cost savings and new revenue generation. Jared is a sought after speaker and keynote speaker at conferences & corporate events, and consults with firms to implement Lean into their organizations.

Session Summary:

You've had a chance this week to learn about ways that Lean can help transform your organization, your team, and your work – but now what?
If you don't take the time to pull the Andon Cord, stop, and think, how will you be able to improve? This session is focused on you. It's focused on what you can do to make real actionable steps for improvement today.
We will look at those critical elements that any successful Lean organization should have, and you will assess which stage your organization is in. Based on your answers using a SWOT analysis, you will begin to craft a clearer picture of what is missing, and what you will do to bridge the gap to strengthen you Lean culture.

Key Takeaways:

- Develop a Lean Management Roadmap with next steps
- Create a SWOT analysis identifying which critical elements your organization should focus efforts
- Collaborate together to identify solutions to some of your most challenging obsticles
- Ideate solutions and countermeasures to propel your organization to the next level

Key Micro-Learnings (Takeaways):

1 _____

2 _____

3 _____

4 _____

TIPS:

A good leader motivates their people through challenges and praise rather than by fear and intimidation.

Employees are NOT "Human Resources", rather they are individuals, and we need to be adapable and agile in how we lead them.

Respect for People is not a throw-away line, it really is at the heart of Lean.

SYSTEM	DESCRIPTION	LEVEL 1 AWARENESS
Strategy Deployment (Hoshin Kanri)	• Aligns breakthrough performance objectives and actions with evolving customer requirements and the organization's mission, vision, values and financial goals • Ensures that all managers and associates work together towards common objectives through systematic goal-setting, detailed planning, regular communication and review, and continuous improvement processes • Integrates all levels and functions of the organization and, potentially, levels and functions of key suppliers	• Leadership only discuss the mission/vision • Directives top down • KPIs if present are inconsistent • No strategic alignment with suppliers
People Development	• Focuses on cultivating a skilled, motivated workforce aligned with lean and agile principles • Empowers and supports frontline managers and employees to solve problems at the lowest level of the organization • Emphasizes development of problem-solving skills and the development of leaders at all levels of the organization • Aims to enhance productivity, quality, overall organizational performance and adaptability • Fosters a culture of learning and collaboration	• Promotions based on tenure/ heroics • Firefighting is rewarded; leaders prescribe solutions • Ideas rarely asked for from frontline or acted on • Limited psychological safety
Workflow Optimization	• Streamlines processes by eliminating waste to optimize efficiency, quality, safety, profitability and adaptability • Focuses on creating customer value • Ensures that production and knowledge work align closely with evolving customer needs and business objectives • Designed to meet takt time with zero defects • Emphasizes continuous improvement, iterative development, cross-functional teamwork • Enhances productivity, responsiveness, and flexibility	• Processes undocumented • Customer cycle time unknown • Queues/rework common • Standard Work absent; variation high • Inventory levels unknown leading to frequent waste of unused items
Problem Solving	• Employs systematic, data-driven methods to identify root causes and develop effective countermeasures at the lowest possible levels of the organization • Involves intensives, ongoing education in A3 thinking, creativity, the 7QC tools, the 7 management and planning tools plus mistake-proofing and specialized techniques like Six Sigma, Lean and Agile methodologies • Strongly discourages intervention by leaders except in special cases that meet strict escalation requirements • A safe environment for trail & error (and failure) exists	• Frequent Firefighting • PDCA introduced, typically it's a one and done improvement • Teams are too busy to improve • Basic problem solving tools are starting to be used • Countermeasures with some root cause analysis
Daily Management	• Uses companywide daily standup meetings, weekly tiered meetings, and visually managed obeya or big rooms to review performance, address issues of production and knowledge work, and implement effective countermeasures • Fosters frequent, consistent communication, accountability, and alignment with customer requirements and organizational goals, promoting a culture of continuous improvement and proactive problem-solving at all levels	• Safety issues underreported out of fear • Meetings ad hoc with no agenda • No visual management • Issues raised but not logged/ owned • No tiered escalation

LEVEL 2 TRANSPARENCY	LEVEL 3 STABILITY	LEVEL 4 PERFORMANCE	LEVEL 5* INNOVATIVE
• Leadership publishes vision/ goals but reviews are uneven • Leaders start to seek frontline input • KPIs established, fear to keep items watermelon green • Suppliers considered in goal setting targets	• Leadership practices catchball alignment when setting vision • Leaders using leader standard work to go to Genba • KPI consistently tracked, Obeya room established • Suppliers informed of Hoshin Kanri vision	• Catchball engagement at all levels essential to establishing Hoshin Kanri vision • Leaders constantly at Genba • Obeya creates a safe culture for reporting red on KPIs • Supplier's input part of Hoshin Kanri vision	• The operating system is part of the culture and proactively drives Hoshin Kanri vision • Leaders exist at Genba • Obeya/KPIs aligned with the strategic Hoshin Kanri vision • Strategic alignment with the-supplier's capabilities
• Leader Standard Work created • Genba walks sporadic at best • Idea system launched but closure is inconsistent • Respect for people is starting to become part of the culture	• Skills matrices established and competency key to promotions • Leaders standard work audited • Ideas actively sought and acted upon • Morale is improved as respect for people made part of culture	• Cross-training for transparent career path progression • Leaders actively looking for improving while at Genba • Time reserved for improvement • Team morale measured and pulling Andon cord encouraged	• Leaders are builders of leaders • Learning analytics predict skill gaps for rapid upskilling • Innovation connected to idea generation and customer input • High morale and engagement, low attrition rates
• Key processes mapped and documented with SOPs • Takt time calculated for key products/services • Inconsistent use of SOPs leads to variations in quality • Early Kanban pilots initiated	• Standard Work documented and followed • Flow balanced to Takt • First pass yield measured and improving • Just-In-Time (JIT) introduced • Safety audits and near miss learning are routine	• End to end lead time reduced • Poka Yoke efforts achieved near zero defects • Real time dashboards expose constraints and drive action • Kanban system/JIT integrated • Coordinated pull systems with suppliers	• Cross-functional processes constantly improved • Mixed model production tied to pull system of single piece flow • Jidoka/autonomation self de-tects and corrects issues • mass customization without lead time penalty
• Rapid Kaizen Improvements are the norm • PDCA is embraced as a cycle • Teams recognize the need to improve processes • Root cause is the norm • Visual management for identifying problems	• Continuous improvement is the norm • Visual management escalation process in place • Cross-functional improvements • System in place for sharing improvement successes	• You have a strong stop and fix culture • Visual management is part of electronic reporting • Improvements extend outside of organization (suppliers)	• Your organization and supplier network has a stop and fix culture • A strong culture of proactive risk mitigation of root cause issues
• Daily stand ups in pilots with basic boards • Escalation path exists; Andon used occasionally • Basic visual management • Issues logged with owners/ dates; follow up is spotty • Tiered escalation	• Daily boards customized to meet performance needs • Escalations meet defined SLAs/resolution times • Visual KPIs cover SQDCM and plan vs actual • Tiered boards relay messages bottom up/top down	• Daily boards aligned with Hoshin Kanri vision • Escalations tracked and shared with the organization • Leading indicators & predictive alerts drive proactive action • Obeya integrates projects, strategy, & operations	• Daily boards integrated across the organization virtually • External visitors study your obeya/tiered system • Supplier boards integrated into Obeya • Instantanious updates = high visual management

* Assuming you meet the criteria for levels 1 through 4, until your customers, competitors, suppliers, and perfect strangers from other industries ask to see what you're doing, you are not at Level 5

Strategy Deployment (Hoshin Kanri)

INTERNAL

Strengths	Weaknesses
Opportunities	**Threats**

EXTERNAL

What are the 3 largest gaps/opportunities to implementing Lean Strategy?

1.

2.

3.

What actions can you take to change these gaps into strengths?

People Development

INTERNAL		
	Strengths	**Weaknesses**
	Opportunities	**Threats**

EXTERNAL

What are the 3 largest gaps/opportunities in your people development plan?

1.

2.

3.

What actions can you take to change these gaps into strengths?

Workflow Organization

INTERNAL		
	Strengths	**Weaknesses**
	Opportunities	**Threats**

EXTERNAL

What are the 3 largest gaps/opportunities to creating a Lean workflow?

1.

2.

3.

What actions can you take to change these gaps into strengths?

Problem Solving

INTERNAL		
	Strengths	**Weaknesses**
	Opportunities	**Threats**

EXTERNAL

What are the 3 largest gaps/opportunities to having a problem-solving culture?

1.

2.

3.

What actions can you take to change these gaps into strengths?

Daily Management

INTERNAL		
	Strengths	**Weaknesses**
	Opportunities	**Threats**

EXTERNAL

What are the 3 largest gaps/opportunities to establishing daily management?

1.

2.

3.

What actions can you take to change these gaps into strengths?

LEAN JOURNEY ROADMAP

STRATEGY DEPLOYMENT GOAL

Action Steps:

1. _____
2. _____
3. _____

PEOPLE DEVELOPMENT GOAL

Action Steps:

1. _____
2. _____
3. _____

WORKFLOW OPTIMIZATION GOAL

Action Steps:

1. _____
2. _____
3. _____

PROBLEM-SOLVING GOAL

Action Steps:

1. _____
2. _____
3. _____

DAILY MANAGEMENT GOAL

Action Steps:

1. _____
2. _____
3. _____

COMPLETE BY DATE:

_____

TOP 3 THINGS TO DO WHEN I GET BACK TO THE OFFICE

1.

2.

3.

CREATE ACCOUNTABILIITY

30 Day Follow Up: October 23rd at 9:30am Eastern Time

60 Day Follow Up: November 20th at 9:30am Eastern Time

90 Day Follow Up: December 18th at 9:30am Eastern Time

All sessions will last an hour and be recorded on Zoom (check post summit emails for details). It's a time for you to ask questions, share successes, and help each other.

KaiNexus | Enterprise Lean Software

www.kainexus.com

One Improvement System for Everything

Transform your organization with a platform that captures, implements, measures, and spreads improvement at scale.

Total	Total	Total	Total	Total
$10.5B	**2M**	**$7B**	**$1.6B**	**876M**
IMPACT	IDEAS & PROJECTS	COST SAVINGS	REVENUE	HOURS SAVED

Increase Visibility

Make informed decisions, hold people accountable for improvement, and develop the discipline needed to sustain and scale continuous improvement.

Organize Work

Know exactly what items to prioritize, setting your team up for success by ensuring that critical tasks are addressed first, resources are allocated efficiently, and everyone is aligned.

Show Impact

Easily validate and demonstrate the impact of improvement throughout your organization so leaders and staff remain committed.

Create Standards

Establish consistency in communication and process, making it easier for everyone to participate in and report on improvement.

Enable Sharing

Build a body of shared improvement knowledge where employees can learn from one another and maximize the positive impact they have on your organization.

Ideas

A3

X-Matrix

Kanban

Huddles

Hoshin Kanri

Incidents

Checklists

Just Do Its

DMAIC

PDSA

Standard Work

Certifications

Gemba Walks

Projects

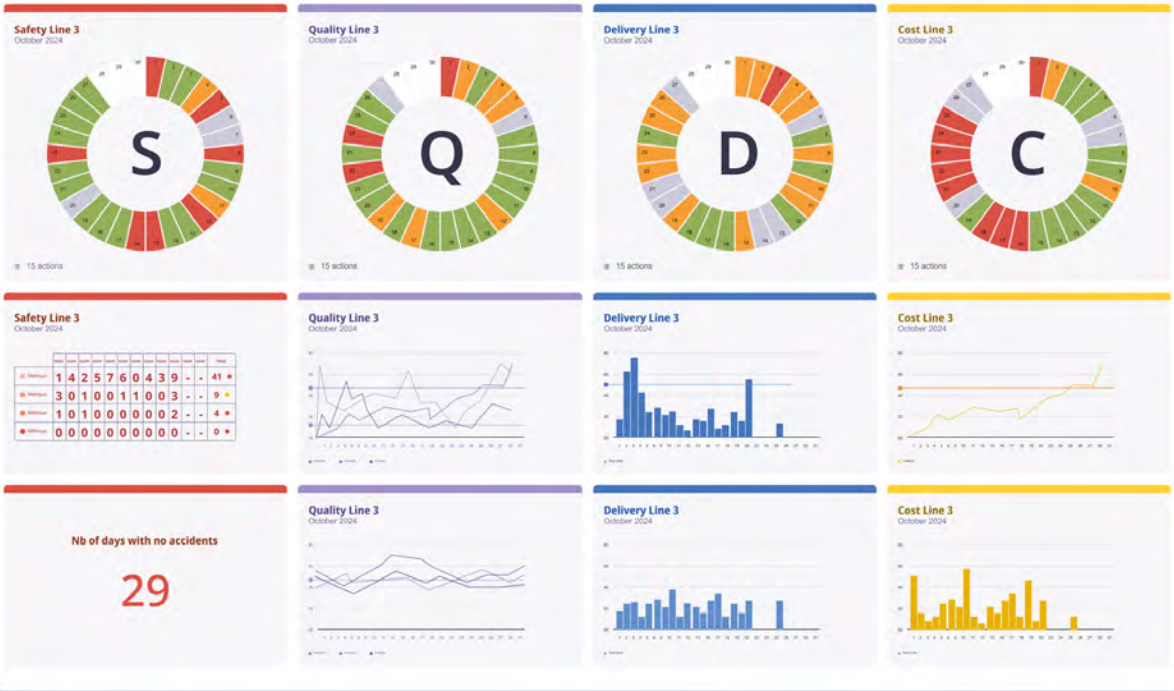
SCAN TO LEARN MORE

Digital Obeyas

iObeya

Learn more at **iObeya.com**

Digital KPIs



sewio
part of HID

One RTLS Infrastructure to Visualize, Measure, and Optimize Your Plant Processes

1 → 2 → 3

Visualize

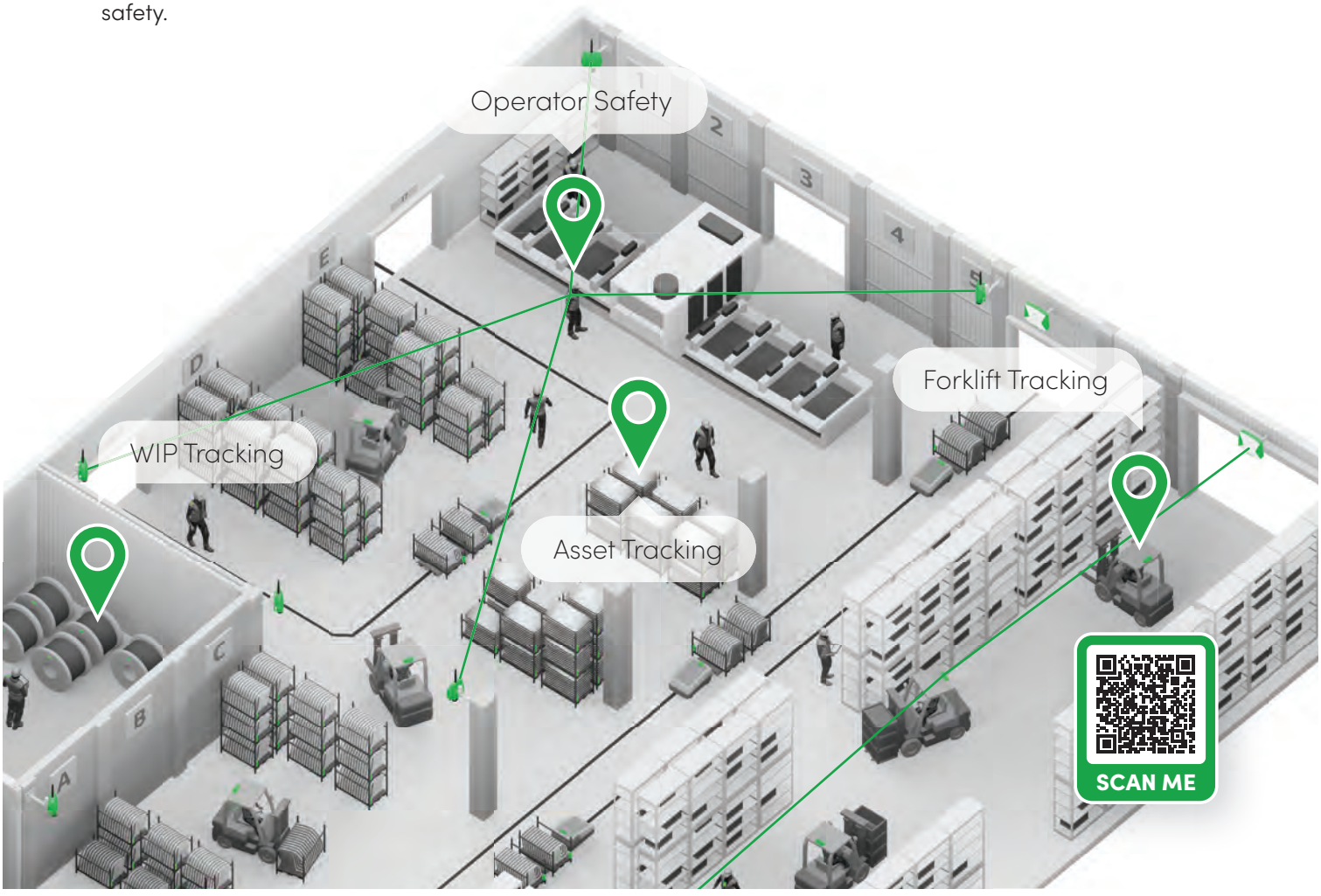
Industry-proven real-time tracking of assets, equipment, and tools for enhanced productivity, efficiency, and safety.

Measure

OEE, true WIP, cycle times, utilization, scrap rates, and more.

Optimize

Analytics for planning production, labor, and logistics.



PROCESS IMPROVEMENT
Partners LLC

More than just consultants, Kaizen Ninjas embed themselves within your team, earning trust quickly and energizing team members at every level. Process Improvement Partners LLC is a consulting firm that helps you grow your profits through sustained process improvement.

Kaizen Ninja Facilitation

Solve your most critical business challenges in one week or less.

Kaizen Ninja Institute

Lead high-impact events. Drive lasting change.

Kaizen Ninja Mentor Program

Solve your most critical business challenges in one week or less.

CONTACT US TODAY:

(717) 947-5535 | info@pi-partners.com | https://pi-partners.com

BENEVA GROUP

Delivering Transformation Talent™ that Drives ROI

- Our 7-Step Precision Search Process delivers 92% placement success
- Average 25-40% faster transformation results for clients
- Proven methodology for finding leaders who drive ROI
- Discover your readiness level in just 2 minutes

ONLY 15 % OF COMPANIES ARE TRULY HIRING READY!

ARE YOU READY?

KELLEY
SCHOOL OF BUSINESS
Executive Education Programs

Top-Ranked. Real Results.

- **Custom Programs** – Delivered on campus, online, or at your location.
- **Workforce Upskilling** – Tailored for employees, managers, and senior leaders.
- **Professional Development Short Courses & Certificates** – Individual and team options with a range of formats to suit your team.
- **Coaching & Degree Pathways** – From executive coaching to advanced degrees.

Scan to explore
Kelley Executive Education Programs.

Global Lean Summit Attendees
Save 15% on Professional Development courses
Use code **GLS15** at checkout.

KELLEY
SCHOOL OF BUSINESS
Executive Education Programs
Bloomington | Indianapolis

To schedule a call with our team to discuss what opportunities best fit you or your organization, contact us at: kelleypd@iu.edu

MEDIA PARTNERS
THE LEAN MAG:

https://www.theleanmag.com

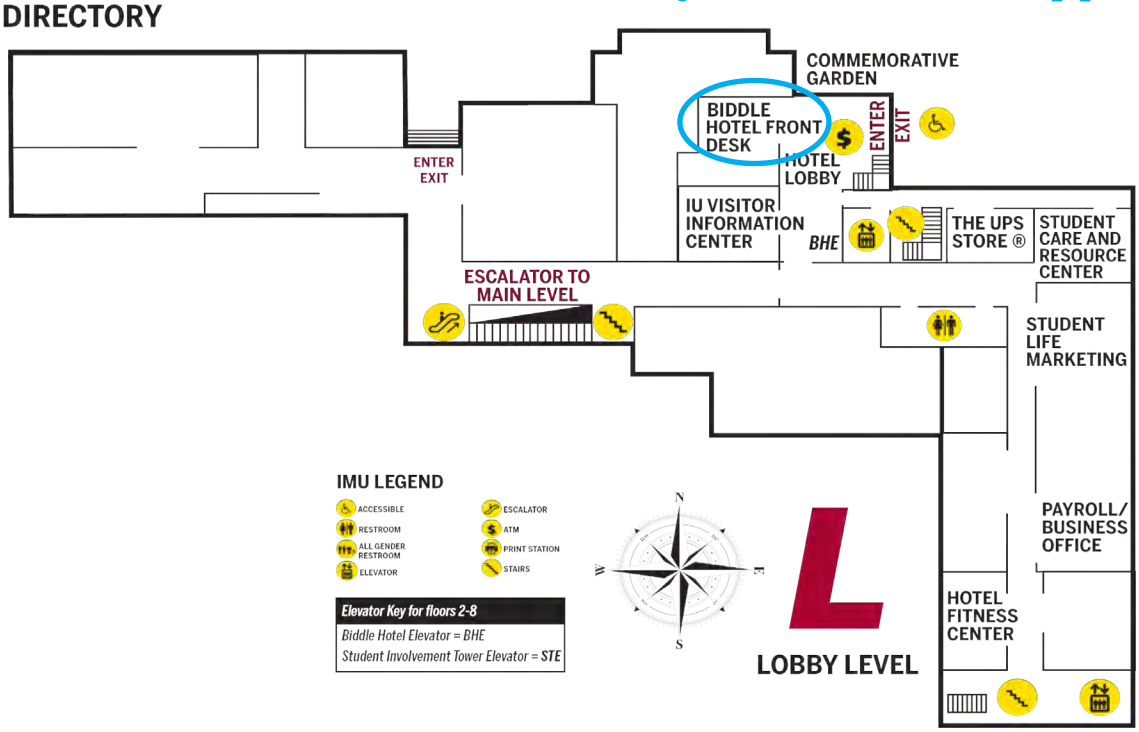
MEDIA PARTNERS
EVER-SO-LEAN PODCAST:

https://eversolean.com

Student Union Map

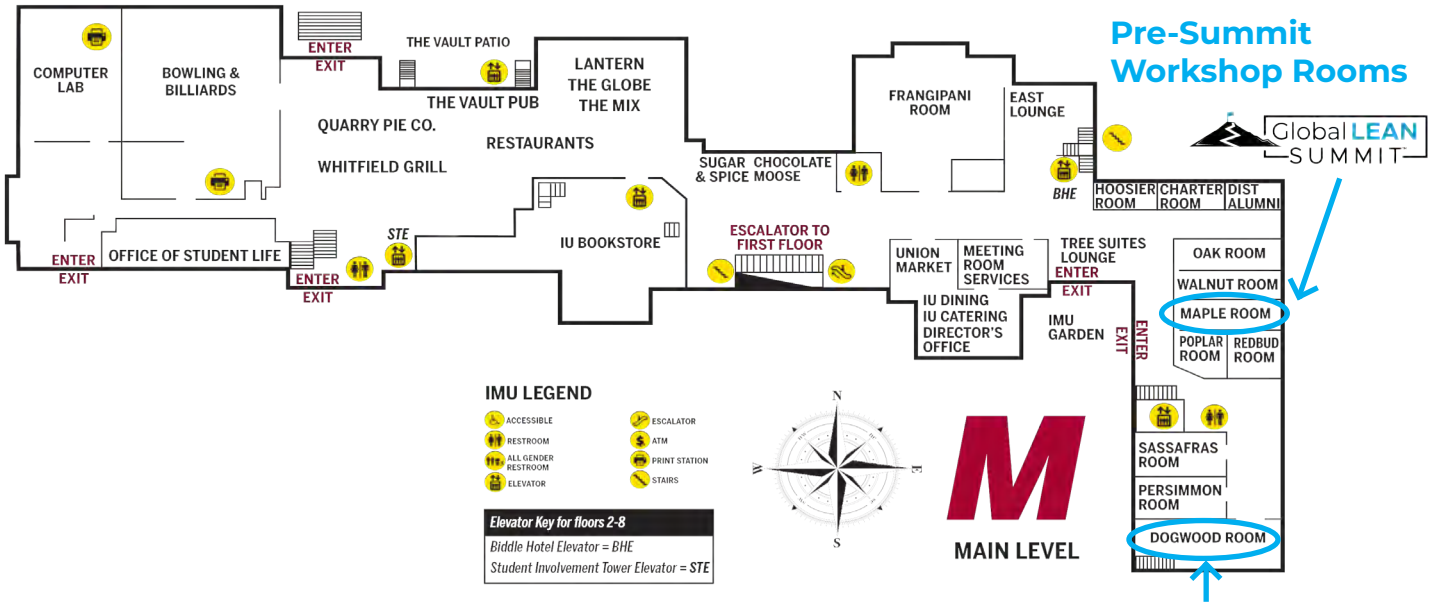
OFFICE OF STUDENT LIFE
INDIANA MEMORIAL UNION
BUILDING DIRECTORY

Toyota Buses Load Here X

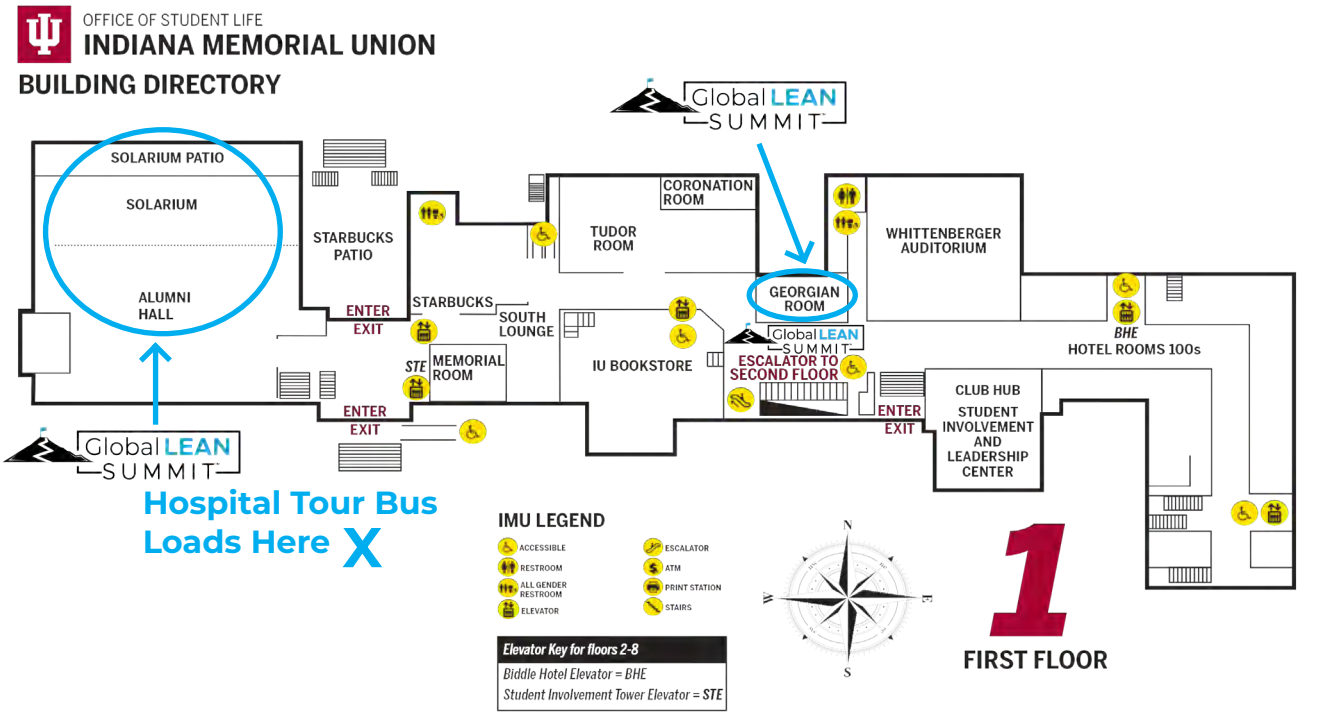


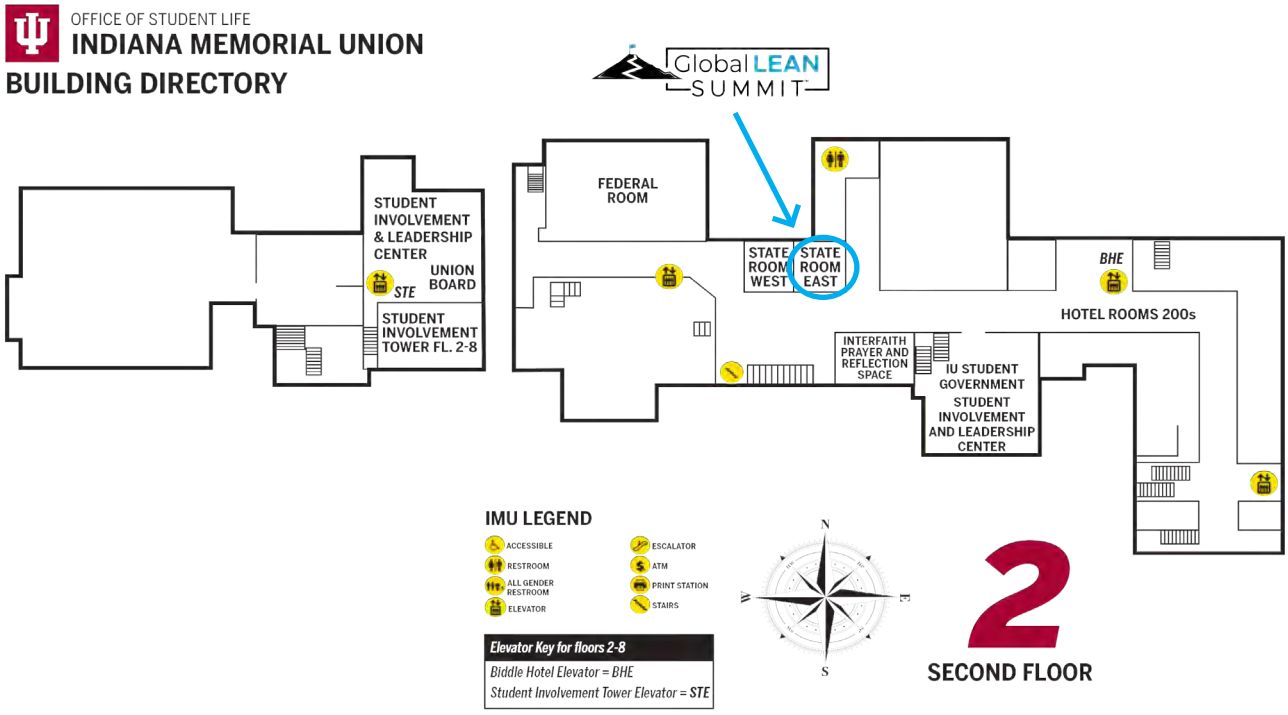
OFFICE OF STUDENT LIFE
INDIANA MEMORIAL UNION
BUILDING DIRECTORY

Pre-Summit Workshop Rooms



Student Union Map





2025 Global Lean Summit Playbook

Global LEAN SUMMIT™