



# SHINGO SUMMIT

*for Financial Services*



**Chicago, IL**  
**October 22-23, 2018**

///WELCOMETO THE

# SHINGO FINANCIAL SERVICES CONFERENCE

Operational excellence is more important than ever for financial services companies like yours. It is a constant search for ways to shorten cycle times, increase productivity, improve quality of service, and eliminate waste in all its forms. Attend the Shingo Financial Services Summit to inject fresh energy into your efforts.

Strengthen your understanding of the principles and approaches that drive process improvement. Learn to evolve your organization's culture to be distinctly focused on continuous improvement. Immerse yourself in a wealth of content on process improvement strategy and dynamic work design.

OLC Education & Conference Center  
9400 W. Higgins Road, Ste. 100  
Rosemont, Illinois 60018

## Meet your Shingo Team



**Ken Snyder**  
Executive Director



**Shaun Barker**  
Assistant  
Executive Director

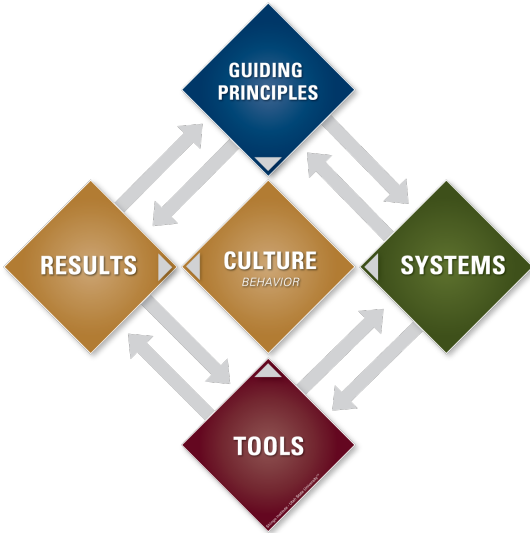


**Mary Price**  
Events Manager

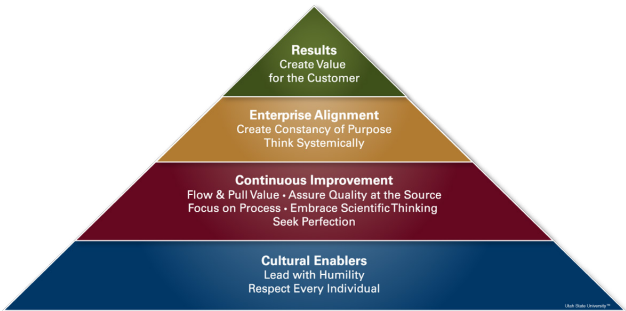


**Amy Sadler**  
Affiliate Relations  
Manager

## THE SHINGO MODEL



## THE GUIDING PRINCIPLES



### Three Insights of Enterprise Excellence™

- 1) Ideal Results Require Ideal Behavior
- 2) Purpose and Systems Drive Behavior
- 3) Principles Inform Ideal Behavior

MONDAY

# 10/22

*Breakfast & Registration*

8:00 am - 8:30 am

Location: Auditorium A/B

*Welcome Remarks*



8:30 am - 9:00 am

*Ken Snyder, Executive Director, Shingo Institute*

Location: Auditorium A/B

*Keynote*



9:00 am - 9:50 am

*Lessons Learned on the Road to a Culture of Operational Excellence*

*Martina Kuhlmeier, VP Talent & Enterprise Services, Liberty Mutual Insurance*

Location: Auditorium A/B

*Networking Break*

9:50 am - 10:10 am



10:10 am - 11:00 am

*The Impact of Trust and Governance*

*Processes on Operational Performance*

*Sheila Montney, Centralized Operations & Technology Officer, State Farm Bank*

Location: Auditorium A/B

*Intermission*

11:00 am - 11:10 am

*Concurrent Sessions*

11:10 am - 12:00 pm

*Lean Management Practices for Top Teams:*

*Accelerating Lean Program Adoption*

*Agustin Stengel, VP, WoW Maturity, Fannie Mae*

*Chuck Walker, VP, WoW Deployment, Fannie Mae*

Location: Auditorium C



*Concurrent Sessions*



11:10 am - 12:00 pm

*Shingo Assessments & Challenging for the Shingo Prize*

*Shaun Barker, Assistant Executive Director, Shingo Institute*

*Location: Conference 1AB*



11:10 am - 12:00 pm

*Organization Continuous Improvement Inspired by the Management System*

*Peter Barnett, DMS Lean Architect Discover Financial Services*

*Stacy Stutz, Expert, McKinsey & Company*

*Location: Auditorium A/B*

*Networking Lunch*

12:00 pm - 1:00 pm

*Location: Auditorium A/B*

*Workshop*



1:30 pm - 4:30 pm

*Hoshin Planning for Enterprise Alignment*

*Lisa Boisvert, Principal Consultant, Business Centered Learning, LLC*

*Location: Auditorium C*



1:30 pm - 4:30 pm

*Next Generation Operating Model*

*Alison Jenkins, Expert Associate Partner & David Hamilton, Partner, McKinsey & Company*

*Location: Conference 1AB*



1:30 pm - 4:30 pm

*Value Stream Mapping for Non-Manufacturing Processes*

*Norbert Majerus, Author Lean Driven Innovation*

*Location: Auditorium A/B*

*Networking Break*

2:30 pm - 2:45 pm

*Reflection*



4:30 pm - 5:00 pm

*Key Learning Moments*

*Ken Snyder, Executive Director, Shingo Institute*

*Location: Auditorium A/B*

TUESDAY

# 10/23

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*Breakfast &  
Information Booth*

*8:00 am - 8:30 am  
Location: Auditorium A/B*

*Workshop*



*8:30 am - 12:00 pm  
Aligning Vision, Strategy, Behaviors  
and Outcomes  
Mike Martyn, Founder, SISU Consulting  
Location: Auditorium A/B*



*8:30 am - 12:00 pm  
Creating Great Leader Work  
Beau Keyte, President, The Keyte Group  
Location: Auditorium C*



*8:30 am - 12:00 pm  
Visual Thinking, Visual Management and  
Operational Excellence  
Gwendolyn Galsworth, President,  
Visual Thinking Inc.  
Location: Conference 1AB*

*Networking Break*

*10:00 am - 10:15 am*

*Networking Lunch*

*12:00 pm - 1:00 pm  
Location: Auditorium A/B*

*Concurrent Sessions*



*1:00 pm - 1:50 pm*

*Application of Operational Excellence  
in Microfinance*

*Lee Mewshaw, OE Program Lead, FINCA*

*Location: Conference 1AB*



*1:00 pm - 1:50 pm*

*Keys to Successful Lean Transformation in  
Financial Services*

*Randy Cook, Master Coach,  
Discover Financial*

*Location: Auditorium A/B*



*1:00 pm - 1:50 pm*

*Changing Role of Leadership in CI and  
Innovation at EDC*

*Scott Powell, Director of Enterprise  
Excellence, Export Development Canada*

*Rob Forbes, VP of Strategy & Execution,  
Export Development Canada*

*Location: Auditorium C*

*Networking Break*

*1:50 pm - 2:10 pm*



TUESDAY

# 10/23

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*Keynote*



*2:10 pm - 3:00 pm*

*Transforming Culture to See Business Results at MassMutual*

*Amy Ferrero, Head of Client Services, MassMutual Financial Group*

*Location: Auditorium A/B*



*3:00 pm - 3:50 pm*

*4+1 - The Power of Habits to Sustain the Gains*

*Brent Harder, Head of Business Process Improvement, Bank of New York Mellon*

*Location: Auditorium A/B*

*Closing*



*3:50 pm - 4:00 pm*

*Shingo Moment*

*Ken Snyder, Executive Director, Shingo Institute*

*Location: Auditorium A/B*



WEDNESDAY &  
THURSDAY

# 10/24&25

Workshop



8:00 am - 5:00 pm

*DISCOVER EXCELLENCE*

*Jim Mayer, Opex Academy*

*Location: Allstate Insurance*

*2775 Sanders Road*

*Northbrook, IL 60062*



This foundational, two-day workshop introduces the *Shingo Model*, the *Shingo Guiding Principles* and the *Three Insights to Enterprise Excellence™*. With active discussions and on-site learning at a host organization, this program is a highly interactive experience. It is designed to make your learning meaningful and immediately applicable as you discover how to release the latent potential in an organization to achieve enterprise excellence. It provides the basic understanding needed in all Shingo workshops; therefore, it is a prerequisite to all the other workshops, and concludes with the BUILD EXCELLENCE workshop.

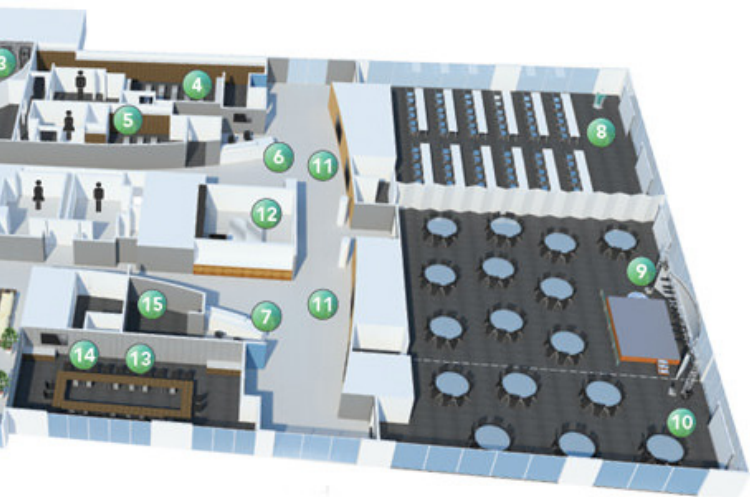
*Both days will be held at Allstate Insurance. All participants will be required to sign a non-disclosure form and will be required to show picture ID to gain access to the host facility. Registrants are responsible for their own transportation.*

*Please note lunch and breaks will be provided by the host company.*



## Location Key

- 1 Multi-Purpose Hall B — 12 Tables / Open space
- 2 Multi-Purpose Hall A — 12 Tables / Open space
- 3 HD Broadcast Video Studio
- 4 Locker Room — Men's
- 5 Locker Room — Women's
- 6 Registration Area A
- 7 Registration Area B
- 8 Auditorium A + AV Room — 72 Seated
- 9 Auditorium B + AV Room — 72 Seated
- 10 Auditorium C + AV Room — 36 Seated



- 11 Pre-Function Event Space
- 12 Catering Prep Area
- 13 Conference Room 1A
- 14 Conference Room 1B
- 15 Coat Rooms (2)
- 16 Lobby
- 17 Main Entrance
- 18 OLC Administration Office
- 19 AV Control Room + Production/Editing Suite
- 20 Loading Dock + Storage

**CHICAGO MARRIOTT  
SUITES O'HARE**

**Address:**

**6155 North River Road  
Rosemont, IL 60018 USA**

**Phone: 847-696-4400**

**Fax: 847-696-2122**

**URL: <https://bit.ly/2Hi4Diz>**

**RENAISSANCE CHICAGO  
O'HARE SUITES**

**Address:**

**8500 West Bryn Mawr Avenue  
Chicago, IL 60631 USA**

**Phone: 773-380-9600**

**Fax: 773-380-9601**



**31ST ANNUAL CONFERENCE  
CINCINNATI, OHIO  
MAY 1-2, 2019**

**PRE-CONFERENCE WORKSHOPS  
APRIL 28-30**

**POST-CONFERENCE TOURS  
MAY 3**

**REGISTER TODAY AT [EVENTS.SHINGO.ORG](https://events.shingo.org)**

# /// LICENSED AFFILIATES

 <p><b>4RESULTS</b> YOUR RESULTS</p>	 <p>alphaAdi®</p>	 <p>ARCHES LEADERSHIP Building sustainable cultures of excellence</p>
 <p><b>ARGOS</b> Consultoria</p>	 <p>blom consultancy</p>	 <p>EFESO CONSULTING</p>
 <p>GBMP everybody • everyday</p>	 <p>Hypo Lean Six Sigma Experts</p>	 <p>IEX</p>
 <p><b>K PERFORMANCE</b> When it counts!</p>	 <p>LENSYS LEAN ENTERPRISE SYSTEMS</p>	 <p><b>möbius</b> business consulting, profoundly different.</p>
 <p>MYELIN</p>	 <p>Opex Academy Consulting</p>	 <p>PXS CONSULTING</p>
 <p>sapartners Together, the power to improve</p>	 <p>SISU</p>	 <p>THE MANUFACTURING INSTITUTE™</p>
 <p><b>TMAC</b> Work Smart. Grow Smart.™</p>	 <p><b>UDEM</b> UNIVERSIDAD DE MONTERREY</p>	 <p>VALUE CAPTURE</p>
 <p><b>XI HORIZONS</b> Efficiency · Innovation · Excellence</p>	 <p><b>YOUNG</b> Young Consulting Group (YCG) 扬智咨询集团</p>	



JON M.  
HUNTSMAN  
SCHOOL OF BUSINESS

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**UtahState**University