

# Operational and Business Process Best Practices: The Poirier Group Point of View

**Coordinator, Facilitator**



**D. Scott Sink**

IISE Performance Excellence and  
Op Analytics Volunteer Lead  
Facilitator/Member, CISE



**Our Presenter today:**



**Jared Frederici, MBB**  
**The Poirier Group**

<https://www.linkedin.com/in/jaredfrederici/>



INSTITUTE OF  
**INDUSTRIAL  
& SYSTEMS**  
ENGINEERS

**11 April 2023**

# Agenda

- |              |   |
|--------------|---|
| 11:00-11:05  | Scott Tee-up  |
| 11:05-11:35  | Jared Perspectives and Points of View on Innovative Best Practices for Cost and Waste Reduction |
| ~11:35-11:50 | Scott and Jared Dialogue (weaving in chat from audience)  |
| 11:50-12:00  | Scott Close out and tee up upcoming webinars and IISE Annual Conference                         |

# Housekeeping



- 1 Thank you for joining us!
- 2 We'll share how to get access to the recording, presentation, YouTube versions and blogs at the end of the webinar. The presentation is available now, use this link to get.. (we'll post as a chat)
- 3 We will field questions as appropriate and time permits. Please **use the 'chat' function** to share your comments and questions.
- 4 Follow up questions are welcomed and contact information is provided at the end of the presentation.
- 5 For those who value **certificates of participation**, IISE will be mailing those out the week after the webinar. Be patient and check your clutter and spam folders if you don't receive one.

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# About Jared



**Jared Frederici**  
Senior Leader,  
The Poirier Group

## Summary

Jared is a skilled Industrial Engineer, Lean Six Sigma Master Black Belt and Operations Consulting Leader with experience in delivering a wide portfolio of projects across several different and complex industries. Jared has experience end-to-end, from planning, receipt of raw materials, to the movement of product through the supply chain, to corporate shared services and beyond. Jared has led hundreds of projects with primary expertise in manufacturing, supply chain and logistics. In addition to helping serve and grow The Poirier Group, who was recently acknowledged as one of the fastest growing Canadian companies, Jared has been a part-time lecturer at The Ohio State University, is a public speaker and webinar presenter, active with the Institute of Industrial Engineers and is most recently published as a coauthor in the Industrial Engineering handbook. Jared balances academic and research-based insights with his core operations and hands-on approach to solving business challenges.

## Education

- **Bachelor of Science, Industrial Systems Engineering**, Ohio State University

## Individual Awards

- **Outstanding Young Industrial Engineer, 2018**  
– Institute for Industrial Engineering
- **Consumer Goods Forum Future Leader**  
(Sweden, 2017)

## Recent Organizational Awards

- **Canada's Most Admired Cultures**, (2019-2022)
- **Vault Top 25 Boutique Consulting Firms**, 2020-23'
- **Silver Medal, Stevie Award (International Business for Boutique Consulting Firms**, 2020, 21', 22'
- **Certified "Great Place to Work"** (22/23')

## Teaching

- **ISE 5815, Lean Six Sigma – Master of Business and Logistics Engineering Program**, the Fisher School of Business, Ohio State University – 2017-2018

## Areas of Expertise

- ✓ Large Scale Program Delivery and Leadership
- ✓ Process Improvement, Process Reengineering, Lean Six Sigma, Op's Excellence
- ✓ Advanced Statistics and Modeling, Benchmarking, RPA/AI, IT, Business Intelligence
- ✓ Leadership Within Operations, Turnarounds

## Industries of Focus

- ✓ Retail & Grocery
- ✓ Food Manufacturing (Dairy, Deli, Produce, Bakery, Meat)
- ✓ Supply Chain
- ✓ Manufacturing & CPG
- ✓ IT & Technology
- ✓ Private Equity & Financial Services
- ✓ Health and Life Sciences and Services

## Niche Industries

- ✓ Mid Size, Luxury and Large-Scale Retail
- ✓ Food (Meat/Bread/Produce/Dairy), Steel and Precision Instrument Manufacturing
- ✓ Produce, Grocery and Food Warehousing/Supply Chain, Cold Chain
- ✓ B2B Defence Contracting in Aviation, Aerospace and Materials
- ✓ Health and Benefits Administration, Private Equity

## Consulting (12 Years):

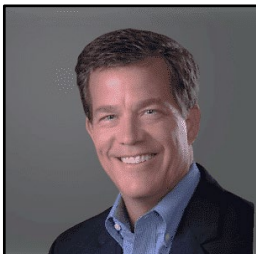
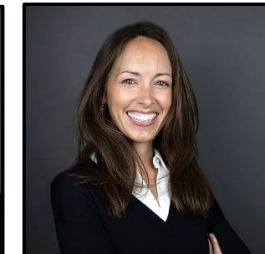
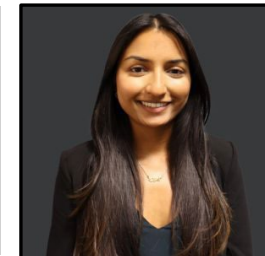
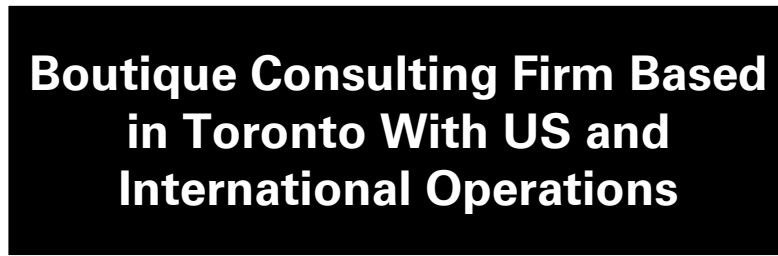
**The Poirier Group**, Toronto, ON  
2011 – Present

*Jared has led hundreds of projects and has served in all major roles on project work from Analyst, Consultant, Sr. Consultant, Project Lead, Program Lead & Delivery & Solution Architecture Practice Lead. Below are select examples of previous cross-industry work.*

## Operations (6 Years):

**Kroger, Kahiki Foods, Volpi Meats, Grupo Bimbo/Sara Lee/Thomas', PPG**

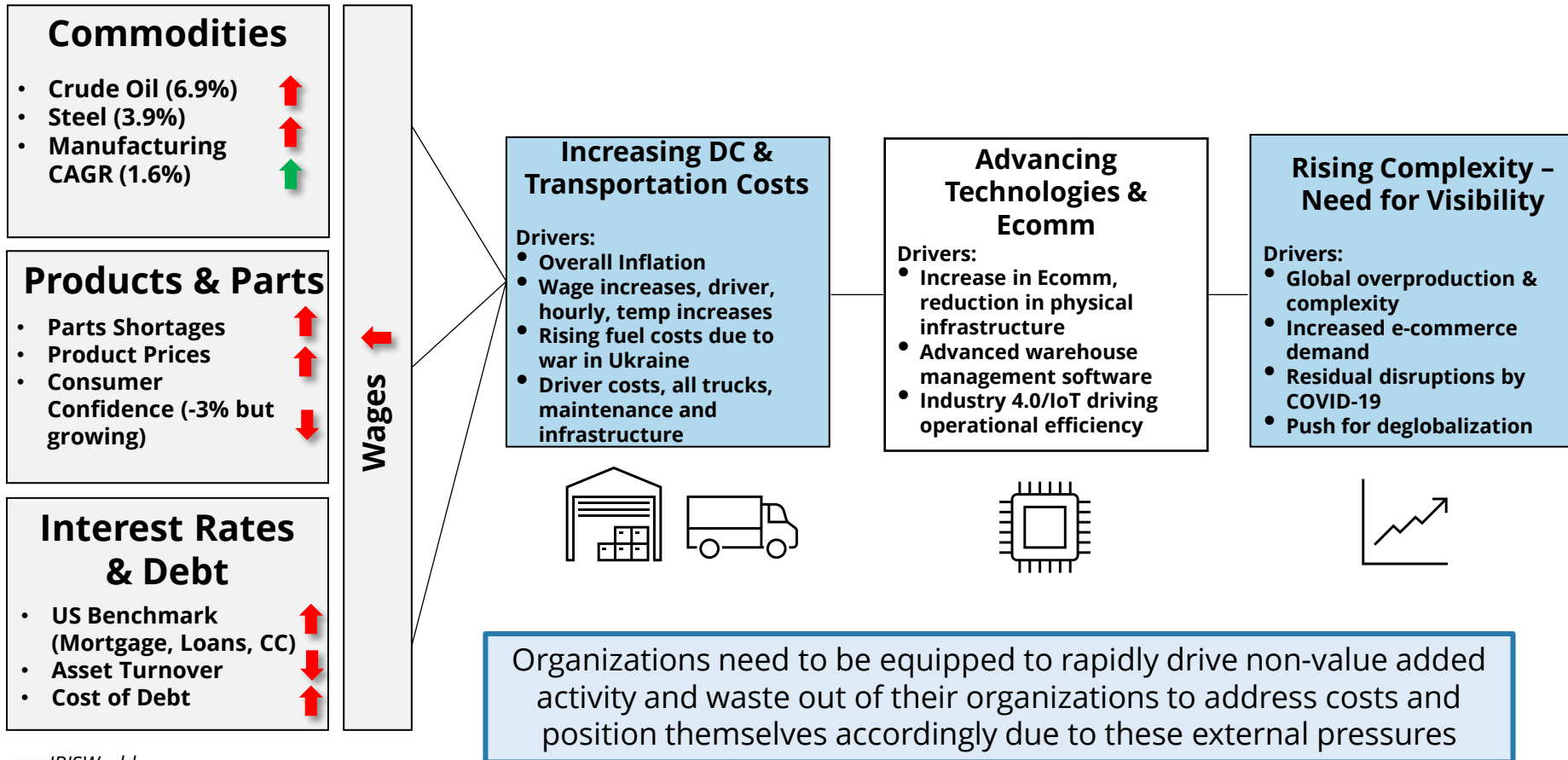
# About TPG



# Key Points

1. The state of the world right now has implications for all businesses, requiring more **systematic, efficient and effective methods of cost and waste reduction** for organizations
2. The faster we can find and pull **“levers”** connected to **real P&L and/or balance sheet impact**, the further ahead we will position our organizations
3. These levers tend to be most associated with **“pockets” of activity** within the organization that are **low ROI**
4. A hybrid **bottom-up and top-down** approach, leveraging the tools of today (ChatGPT, CoPilot, IBIS + API, etc.) may help get you there faster
5. Addressing areas such as **indirect procurement, supply chain, back office, org. design and enterprise effectiveness** are 5 typical levers in many organizations (N=~11,000)
6. Great business cases are saving organizations – highest and max leverage is **aligning your leadership teams** to delivering a portfolio of max ROI parallel initiatives

# State of Affairs & Implications, April 23'



Source: IBISWorld  
TPG Client Set



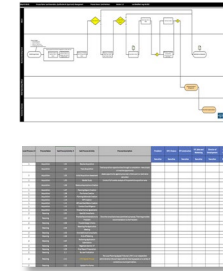
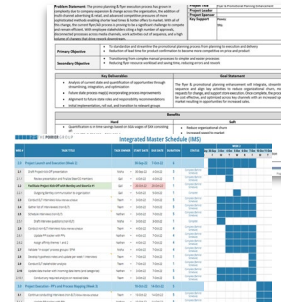
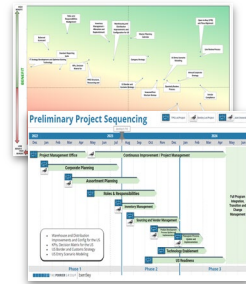
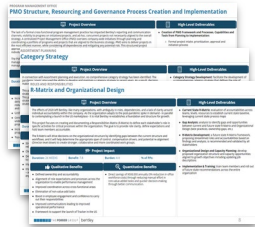
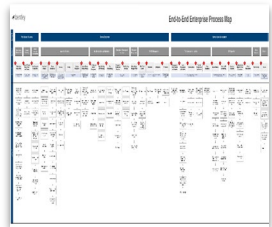


# Problem-Solving Approach

## Initiation

## Implementation

## Transition



### Current State Understanding

- Interviews and observations to develop EPM process map
- Pain points logged and categorized into affinity themes, in order to begin solution development
- Analysis of varied org. sources

### Improvement Project Development & Validation

- Analysis of current state assessment, a visualization of the ideal state the company is headed, and what needs to be done to achieve this

### Improvement Project Sequencing & Roadmap

- Prioritization of projects based on expected effect of key benefits and execution burden
- Consideration of dependencies and competencies within the organization

### Project Launch and Planning

- Fully define and plan out the project including resources and timing
- Review current state of areas of focus and plan out enhancements to be made

### Improvement Execution

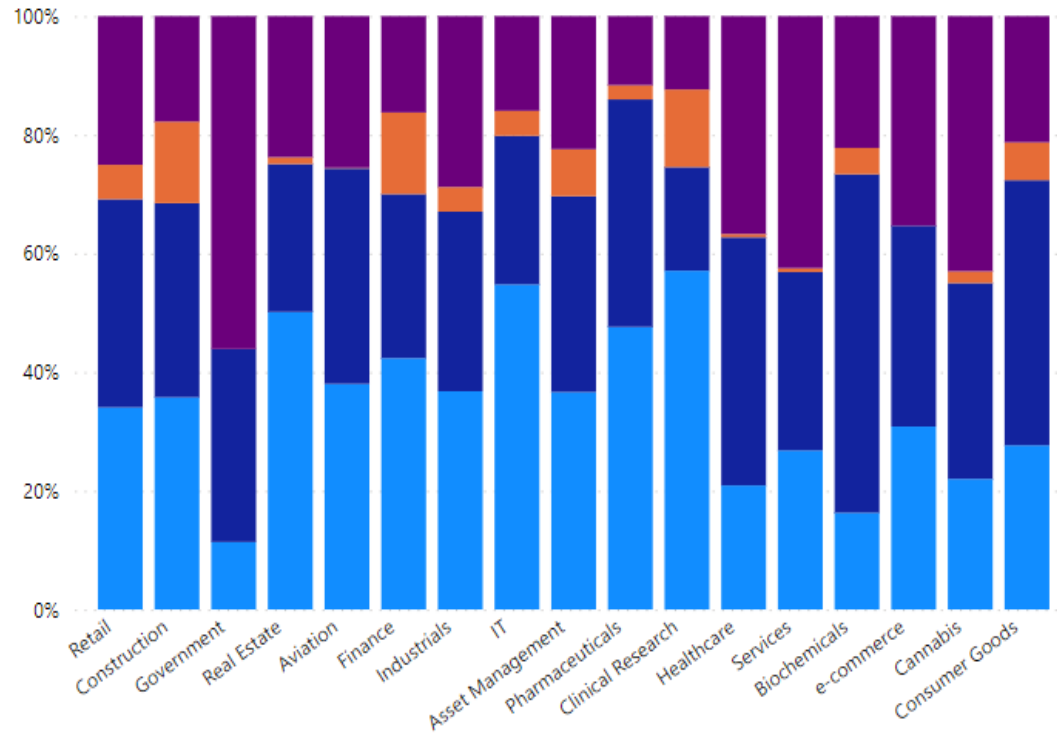
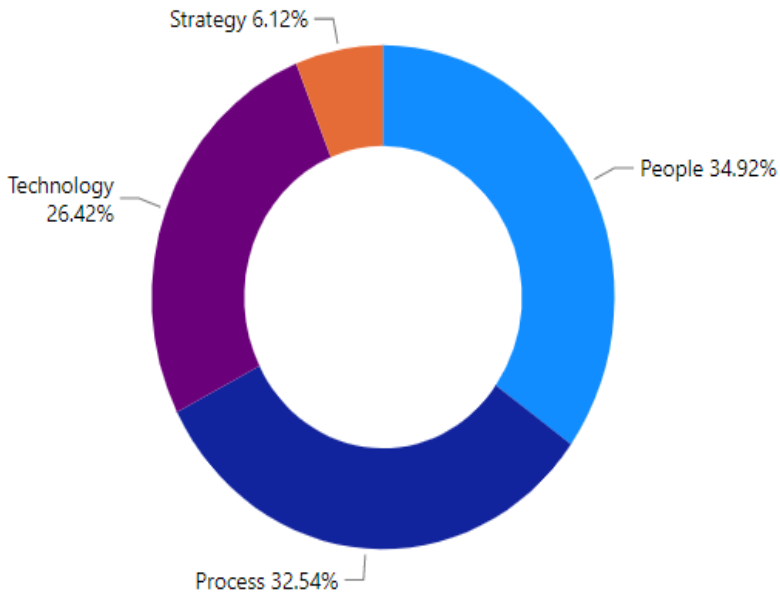
- Define ideal state of improvement and align with the organization on the change
- Fix the process/system
- Develop the content, methods and training materials for the improved future state

### Training & Rollout of project into the business

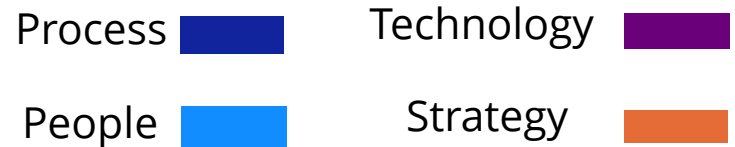
- Training of new processes and practices including new tools and roles
- Begin working in the new and improved way
- Realize the benefits of the change

# Pain Points – Bottom Up

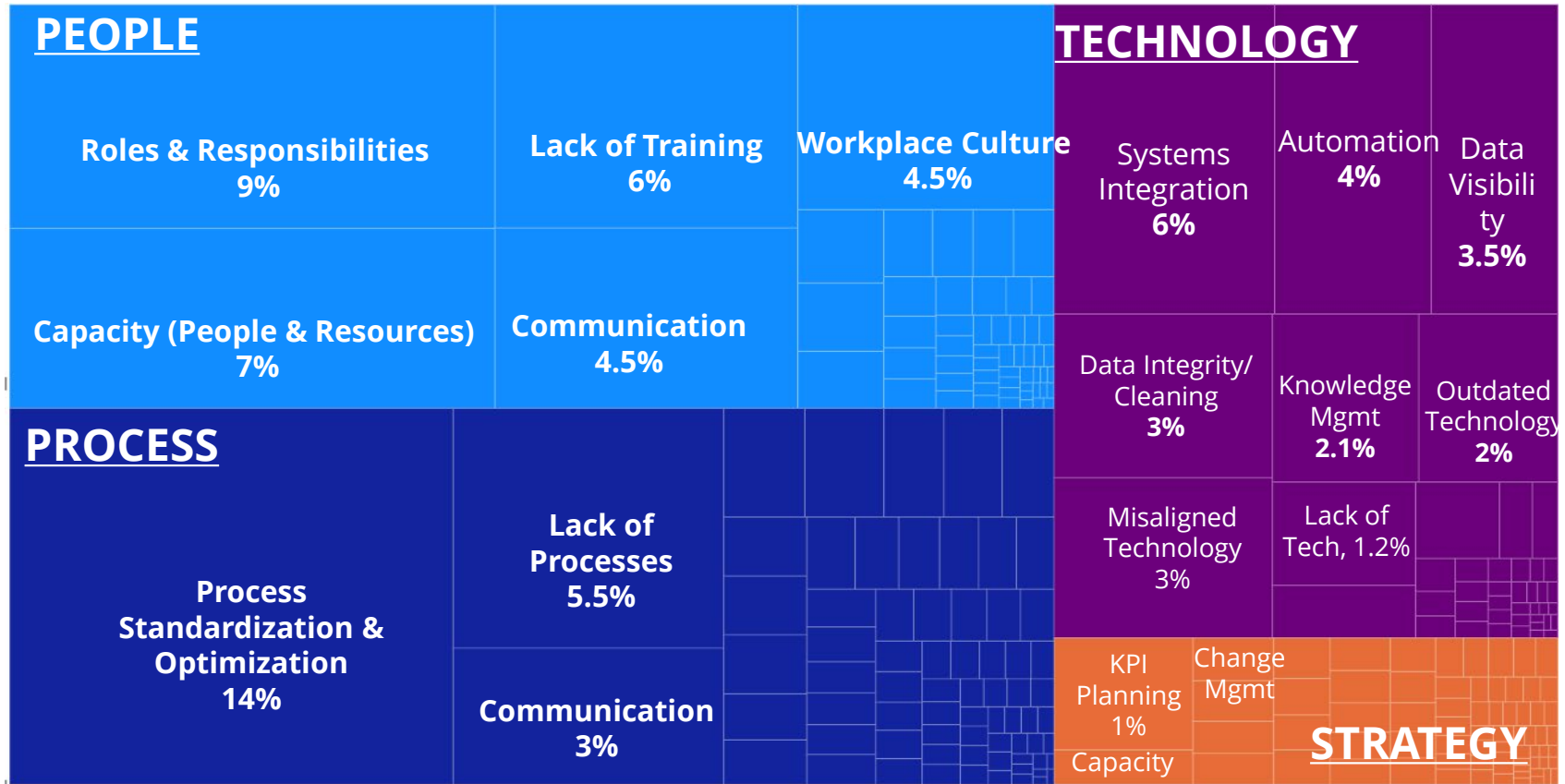
## TPG's Most Recent Portfolio of Projects



**N = 11,000+**  
**Number of Companies = 50+**  
**Number of industries/sectors = 20+**

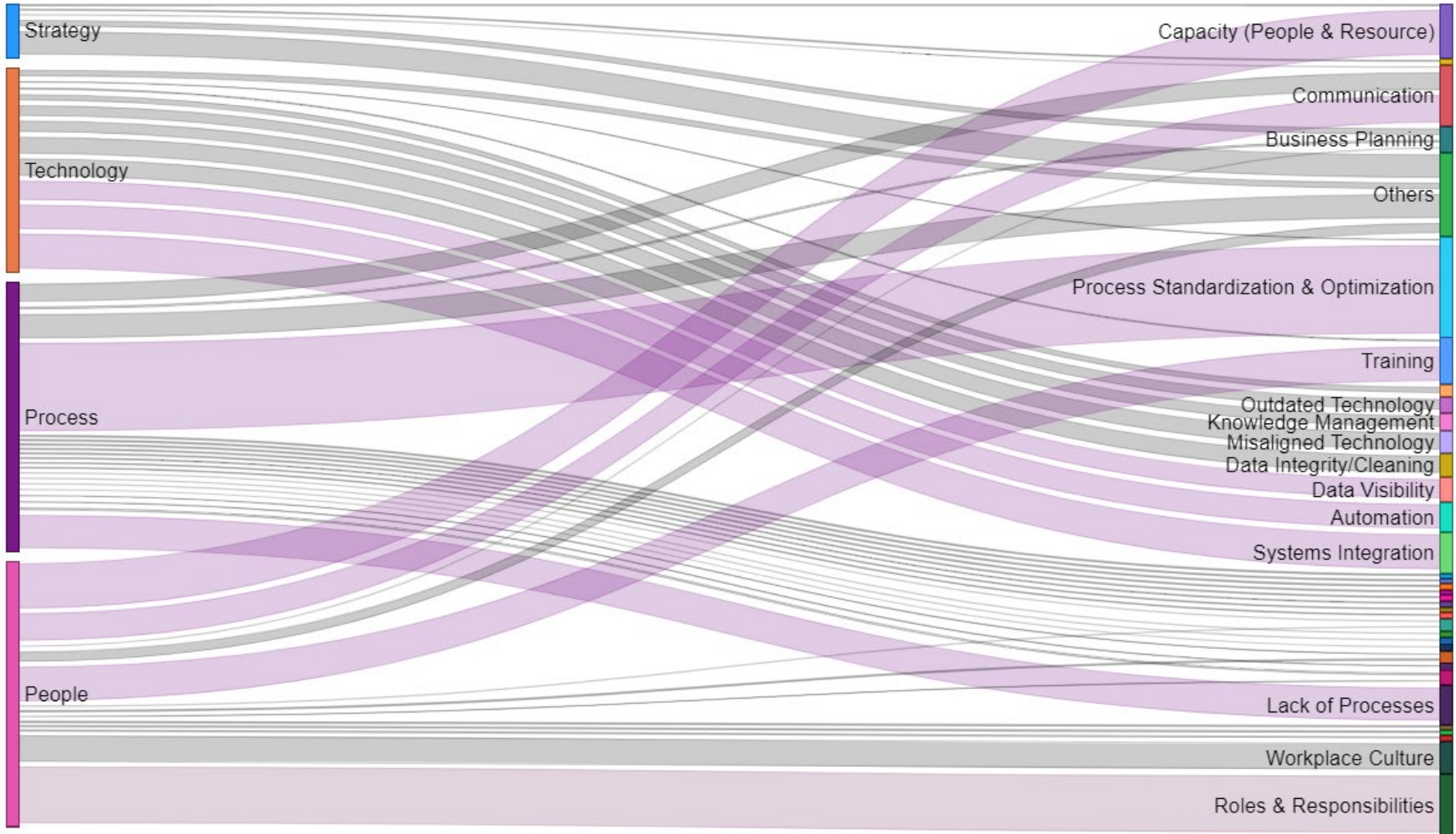



# Sub-Theme Distribution of Pain Points Top 80%



Dispersion of Real Pain Points Felt by TPG's Organizations' Served,  
Broken up by Affinity Groups

# Affinity Theme 1 & 2 Pain Points

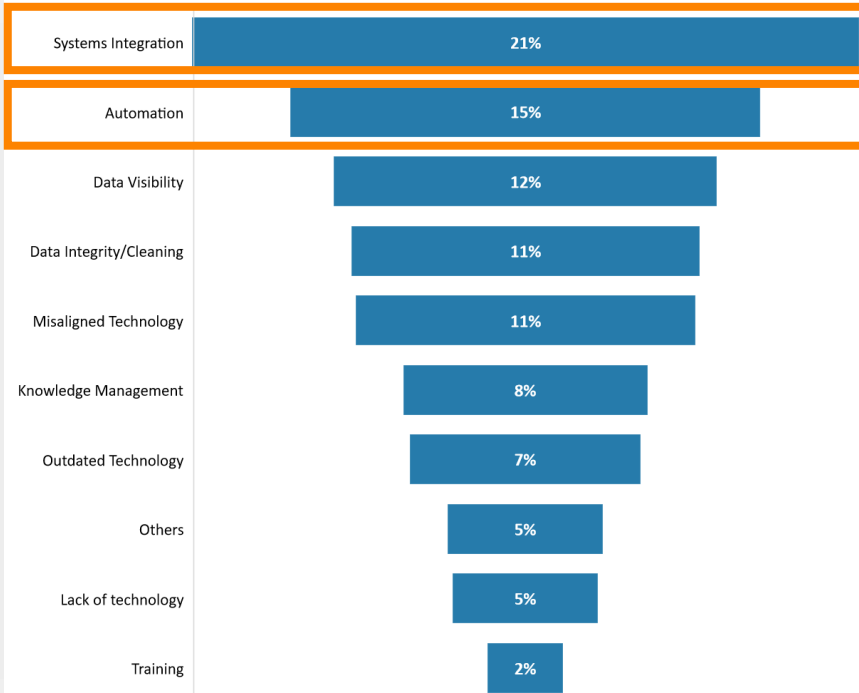


 Represents majority of pain points

# Major Technology Trends



Technology Themed Pain Points



## SYSTEMS INTEGRATION

"So many systems to confirm an appt."

"Very little connectivity between accounting and construction software. We don't have certain info as a result"

"There is nowhere to see all customer info in one place."

## AUTOMATION

"Everything is tracked manually, approved through email and recorded in excel spreadsheet."

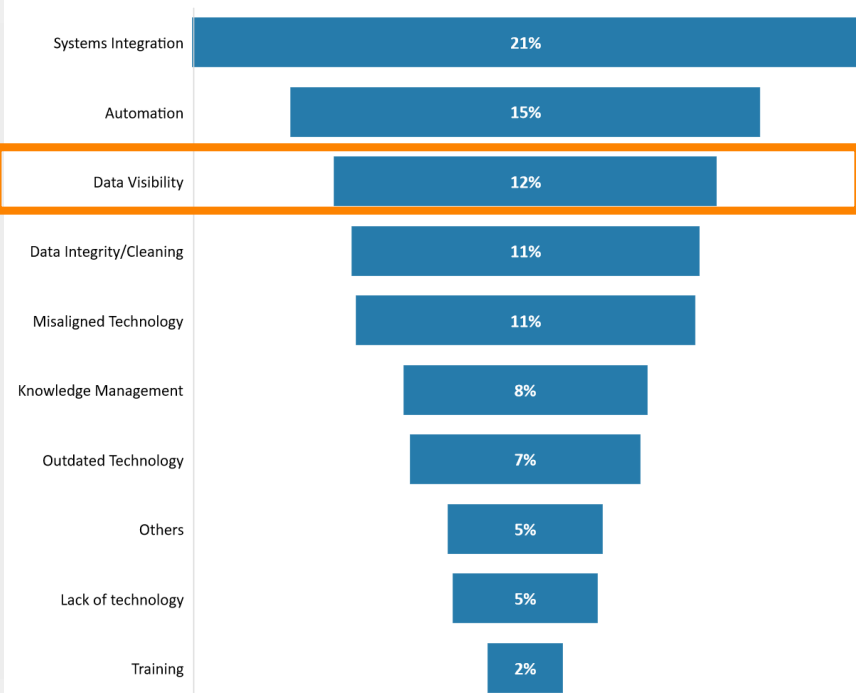
"Manual update to PO reports required to close costing"

"Printing of item release to match to customer item release is a manual and tedious process."

# Major Technology Trends



Technology Themed Pain Points



## DATA VISIBILITY AND INTEGRATION

"No visibility on what call distributions look like."

"Finding info is a challenge - at each stage team members have to dig for it.."

"Don't have performance-based metrics/markers to see the performance of the products"

"Currently, data is not organized to make it able to scale."

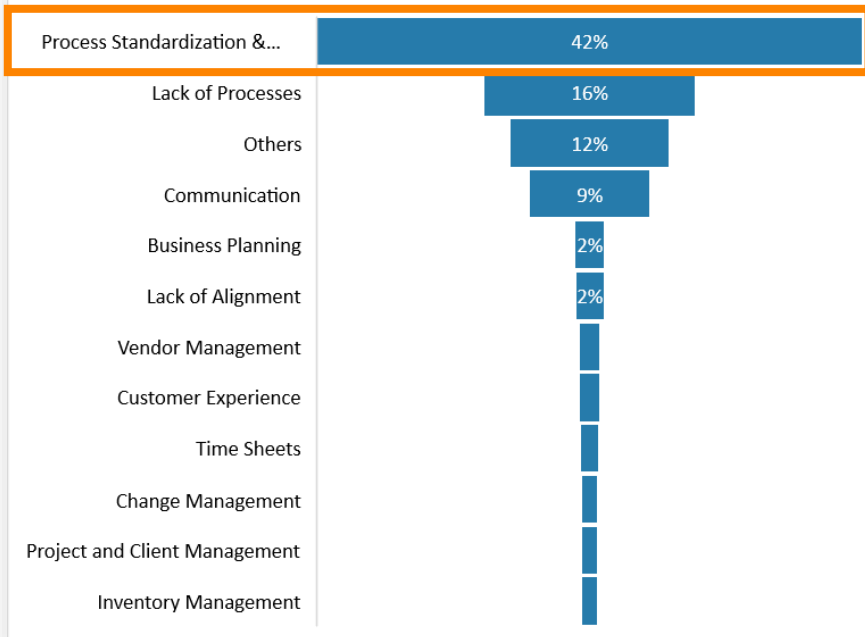
"Receiving duplicate purchase orders, which do not match with my orders purchase orders - no detailed lines and 1 purchase order is used for 50 different jobs. ."

"Incorrect BOMs and omissions affects production"

# Major Process Trends



## Process Themed Pain Points



## LACK OF PROCESSES

“How do you train on something when not everyone uses the same processes?”

“No thresholds for invoicing approvals. Only done by highest ranked individual in category”

“Monthly reports are done differently each month.”

## PROCESS STANDARDIZATION & OPTIMIZATION

“Not a consistent process when recruiting employees. No specific skill set when hiring.”

“A lot of unnecessary email communication”

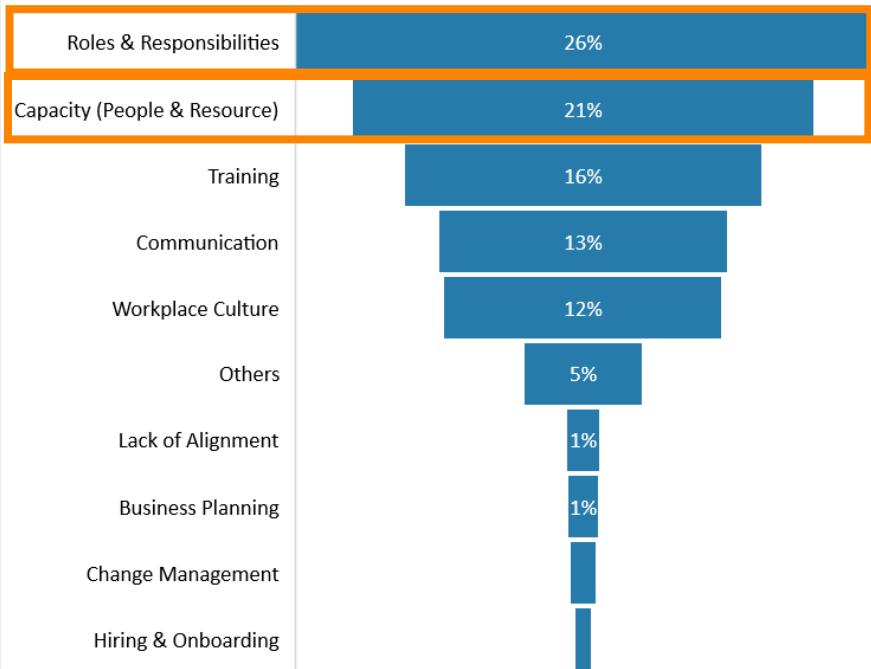
“No standardization on how to communicate across the company. .”



# Major People Trends



## People Themed Pain Points



## Roles & Responsibilities

"Customer care is not defined. Not sure who owns it."

"Lack of role clarity in who creates opportunity in CRM"

We can discuss something and say that we want to follow up but that falls through the cracks.."

## Capacity

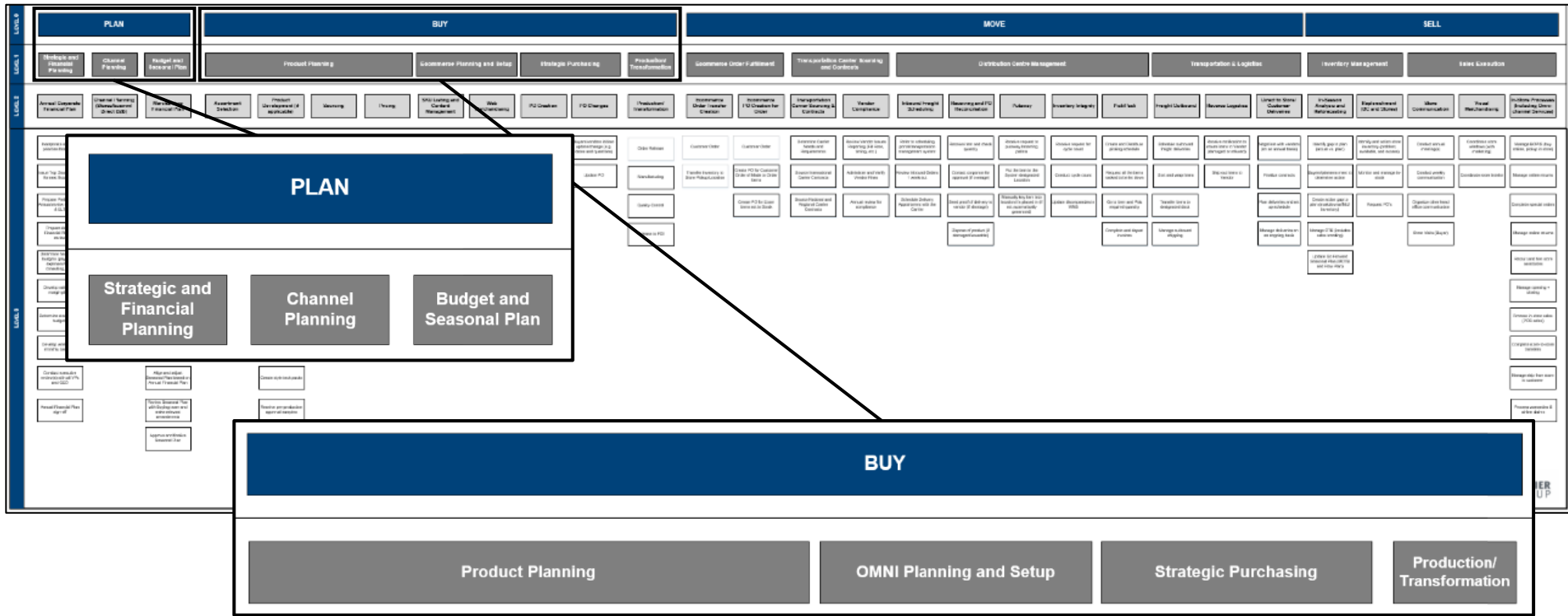
"We are lacking certain roles on site and there are not enough people to do the job."

"Technical Manager is also a PM on certain projects due to a need for a PM."

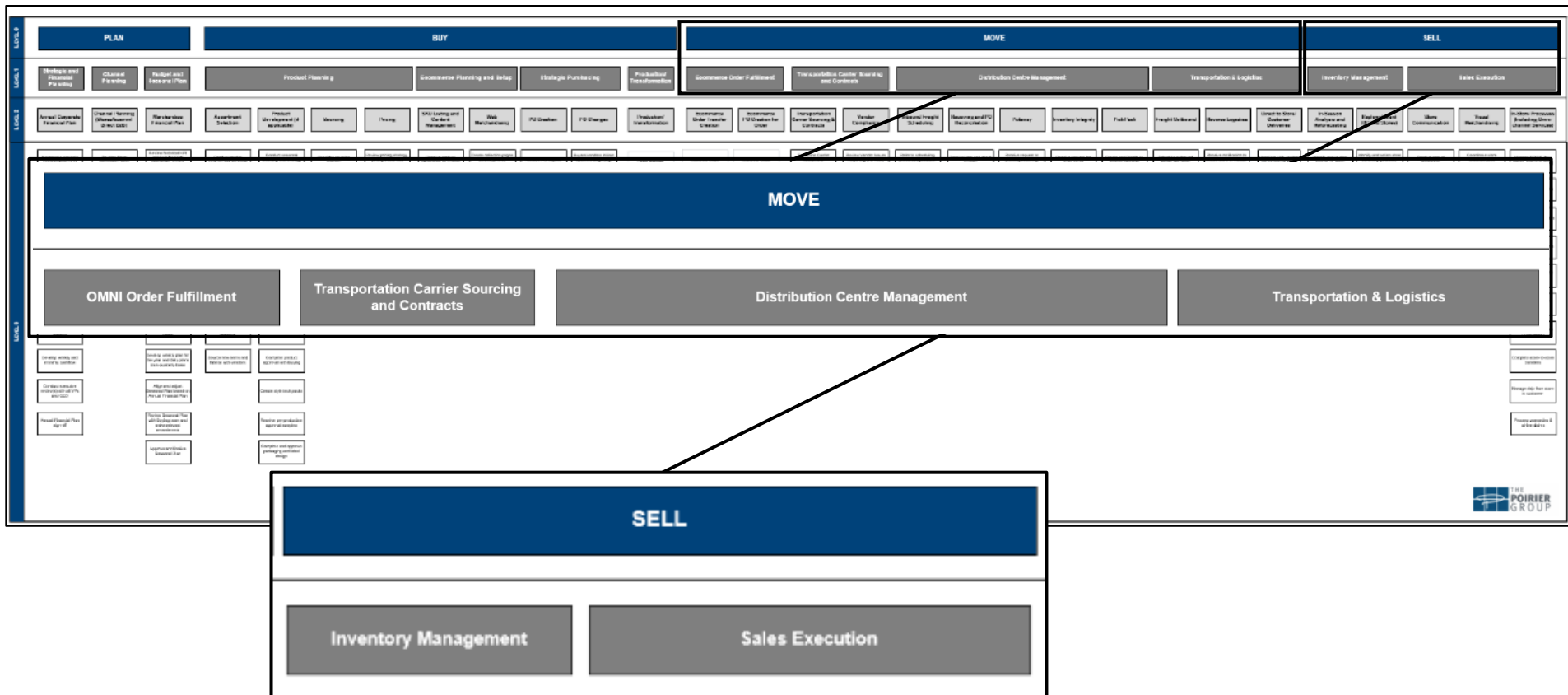
"Hard to find people (staffing)."

"Super high rate of turnover in Centralized Purchasing. Every month there is new person"

# EVSM View – End to End Processes (pt. 1)



# EVSM View – End to End Processes (pt. 1)



**“Heat Map” Earlier was Comprised of Overlaying Pain Points Onto the Originating Process in the Enterprise Process Map**

# Organizational Analysis – Top-Down w/ Levers

Corporate ERP Modules, Financial GL & Core Financial Reports, Management Reports, Internal Documents, Transaction Master Files, Sensors/Controllers/Plant Systems, Call Centers, Website Logs, CRM, etc.

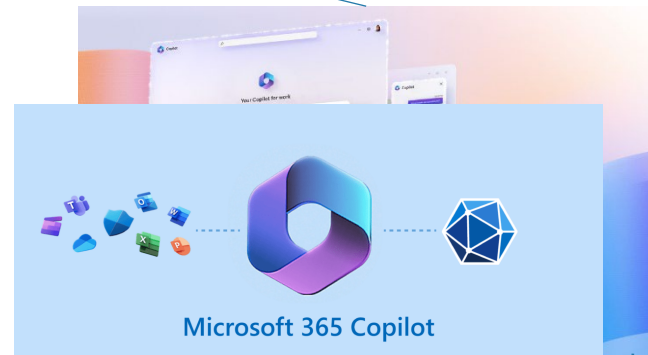
Rapid Organizational Leverage Analysis



Chat GPT



S&P CAPITAL IQ  
McGRAW HILL FINANCIAL



Microsoft 365 Copilot

↑ 3.8%

Pricing

↑ 6.2%

Volume

↓ 10.2%

COGS

↓ 8.8%

SG&A

↓ 14.3%

Inventory

↑ 4.2%

Receivables

—

Payables

↑ 24.2%

Projects

Grow Revenue / Price Recovery

Reduce Costs

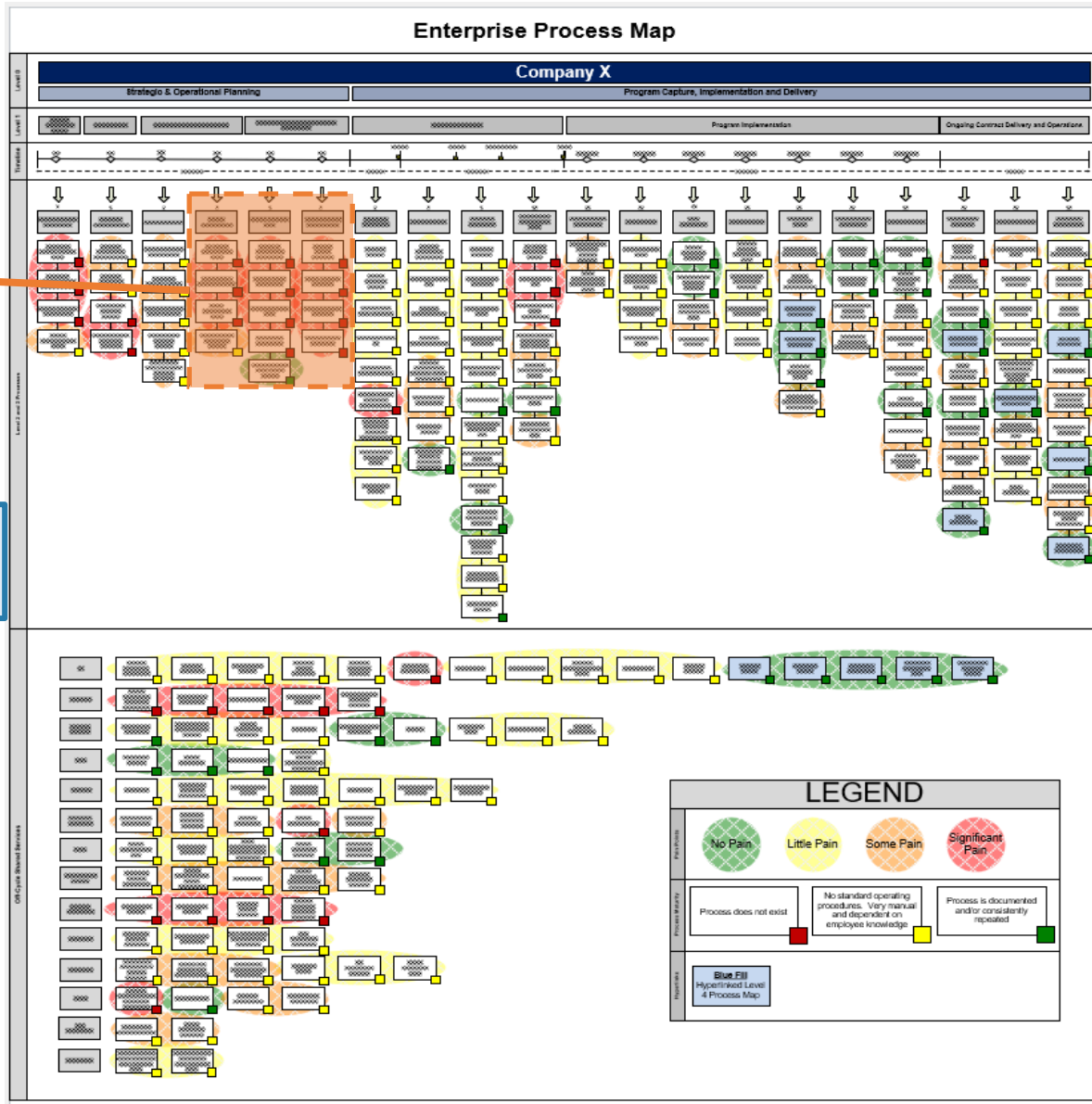
Reduce Working Capital

Improve Fixed Capital

# Key Points (Recap)

1. The state of the world right now has implications for all businesses, requiring more **systematic, efficient** and **effective methods of cost and waste reduction** for organizations
  - Major commodities are up, plus wages with many external factors not in our favor
  - Post pandemic bullwhip effect has put pressure on the tender balance of asset turnover vs. covenant coverage vs. out-of-stocks vs. demand volatility
  - The cost of debt is rising, impacting all organizations, especially private equity owned straining liquidity, cash flow and putting pressure on costs
2. The faster we can find and pull **“levers”** connected to **real P&L and/or balance sheet impact**, the further ahead we will position our organizations
  - Understanding these levers and how they’re connected to real ROI is critical:
    - Increase Revenues
    - Cut Costs
    - Improve Working Capital
    - Improve Fixed Capital Utilization
3. These levers tend to be most associated with **“pockets” of activity** within the organization that are **low ROI**
  - Activities not connected to the aforementioned 4 primary levers above
  - Enterprise initiatives not being tracked, overlapping, weak business cases
  - Indirect procurement, pockets of “reporting”, shared services and back office, roles, lack of process / standardization
4. A hybrid **bottom-up and top-down** approach, leveraging the tools of today (ChatGPT, CoPilot, IBIS + API, etc.) may help get you there faster
  - Getting connected to source data more efficiently and detecting errors faster
  - Utilizing more advanced technologies to make analysis faster, easier, more accurate
  - Isolate organizational levers rapidly and go!

# Solution Architecture - Zooming In



Indirect Procurement

Supply Chain & Transportation

Back Office RPA & AI

R-Matrix & Org. Design

Enterprise Initiatives & PMO/CI

# Lever 1 – Indirect Procurement

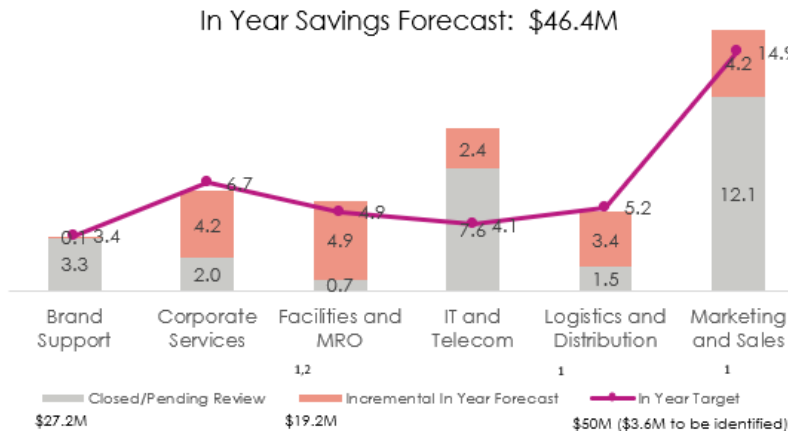


Spend Type	Spend Category (Level 1)	Baseline Spend	% Spend Addressability	Addressable Spend Value	1	2	3	4
	Travel & Entertainment	22	90%	20	High	Med	Med	High
	Office Rent, FM & Utilities	26	80%	21	Med	Low	Med	Med
	HR Services	14	70%	10	High	Med	Med	High
	Other Professional Services	18	80%	14	Med	Med	Low	Med

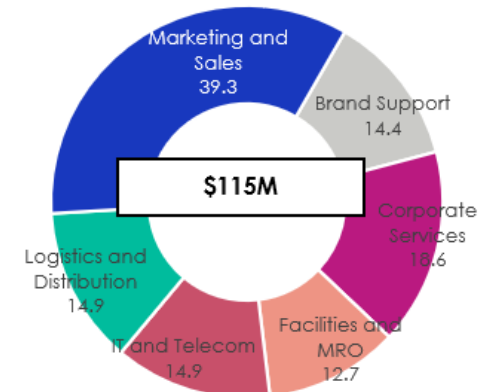
**Rapidly Addressing Addressable Spend, Benchmarking to Proper Internal and External Sources, Advancing Procurement and Vendor Practices**

SG&A

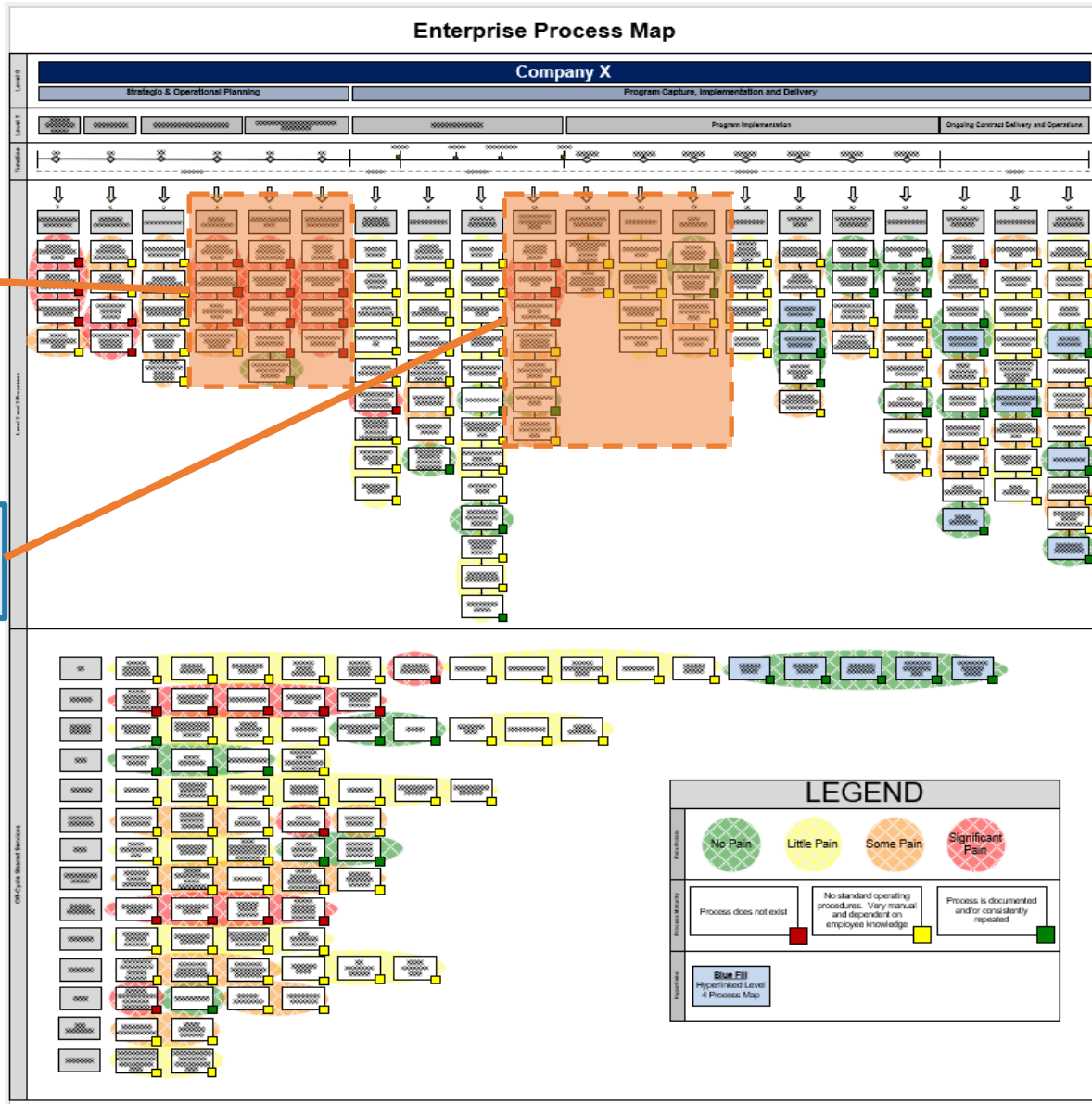
## Project BOLD – Executive Summary



## Annualized Savings Forecast



# Solution Architecture - Zooming In



Indirect Procurement

Supply Chain & Transportation

Back Office RPA & AI

R-Matrix & Org. Design

Enterprise Initiatives & PMO/CI



# Lever 2a – Supply Chain and Transportation



Actual Charged: \$8,135 @16K KG  
 Actual Pounds Shipped: 862 KG  
**Total Over Charged:  
 ~\$7,000+**

## Top 20 Carriers represents 91% of Total Freight

### Small Package

Fluor Daniel	➔	\$1,179,713
SAATCHI	➔	\$50,293
UPS Canada – Delivery	➔	\$41,880
NEW COURIER INC.	➔	\$29,015
ACE COURIER SOLUTIONS	➔	\$21,357
OLD COURIER CANADA LTD.	➔	\$19,253
UPS Canada – Brokerage	➔	\$18,393

### Air

CONNECTION INTERNATIONAL	➔	\$879,597
TOTAL TRANSPORTATION SOLUTIONS		

**Legend**

- ➔ =Not enough information to determine savings
- ➔ =Expert knowledge and rate comparison, shows there are savings
- ➔ =Negotiated contract has little to no savings

### LTL

FURUKAWA FREIGHT	➔	\$222,627
TRABLE NAVIGATION INC.	➔	\$103,027
WELAND TRANSPORT LIMITED	➔	\$59,924
SMITHSON TRANSPORT	➔	\$51,105
WFOURWAY LOGS	➔	\$35,904
FLYT FREIGHT SERVICES (CAN)	➔	\$20,096
WERNER TRANSPORT	➔	\$18,066

### Other

CONNECTION INTERNATIONAL	➔	\$113,709
TOTAL TRANSPORTATION SOLUTIONS	➔	\$82,797
DE LAKE LAMBER	➔	\$80,025
BLACKBURN MANUFACTURING	➔	\$41,139
MANHATTAN TRADING CO. LTD.	➔	\$20,067

**Rapidly Assess and Benchmark Costs of your Transportation Vendor Ecosystem (Internal, External, 3PL/4PL)**

# Lever 2b – Supply Chain and Transportation



## 5/ Additional DC (Mixed Volume)



### Volume

Number of Nodes

3

Locations: East DC, West DC, Additional DC



62.7 Million Units

### Cost % of Sales \$ Per Unit



\$ 144.5 Million 6.5% \$ 2.31 per Unit



\$ 58 Million 2.6% \$ 0.92 per Unit



\$ 10.1 Million 0.37% \$ .16 per Unit

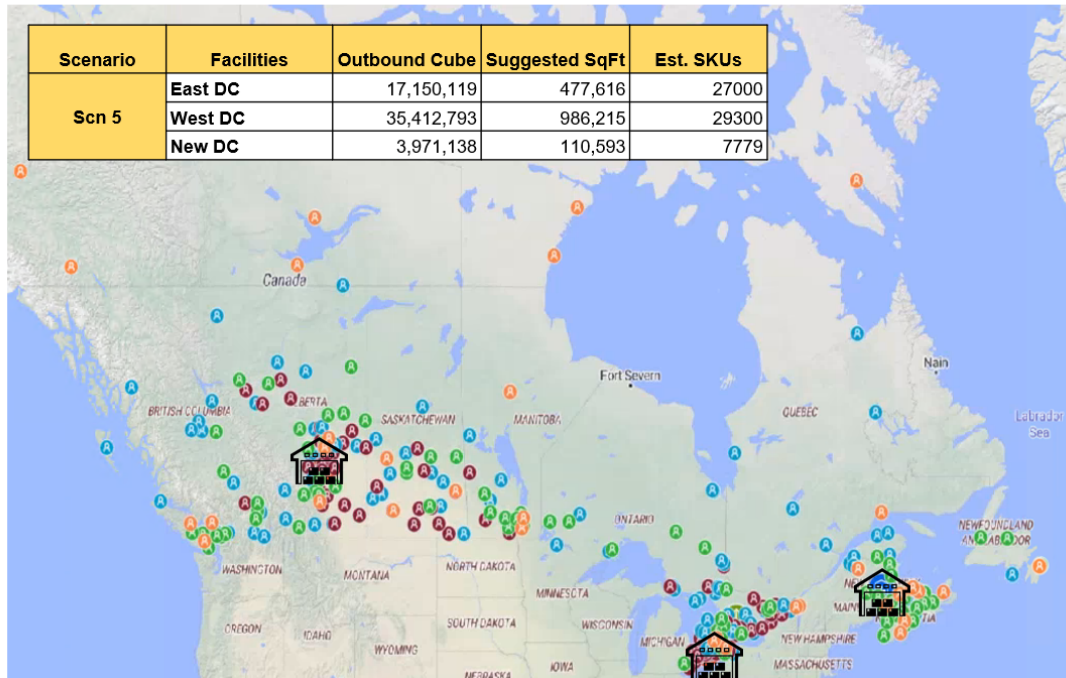


\$ 3.39 per Unit  
\$ 23.73 per Line



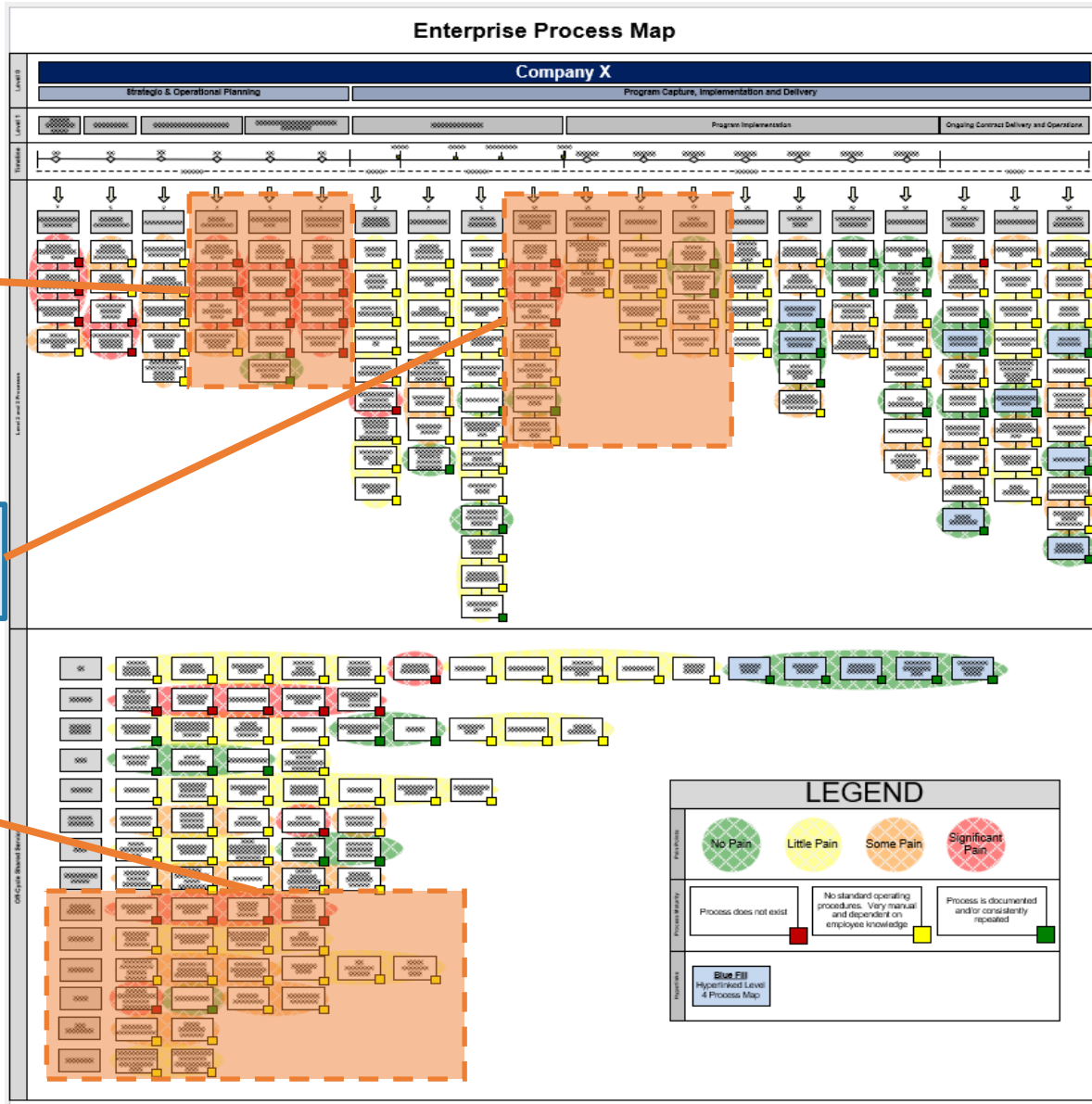
### Service

47% within Next Day delivery



**Rapidly Assess Your Network Supply Chain Ecosystem (Simple, Moderate, Complex)**

# Solution Architecture - Zooming In

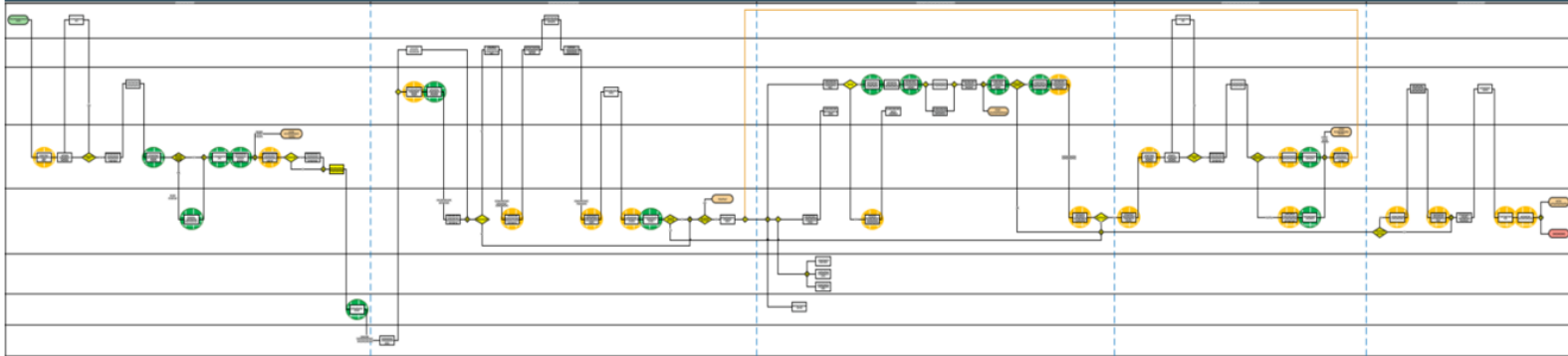


LEGEND			
 No Pain	 Little Pain	 Some Pain	 Significant Pain
 Process does not exist	 No standard operating procedures. Very manual and dependent on employee knowledge	 Process is documented and/or consistency repeated	
 Blue Fill Hyperlinked Level 4 Process Map			

# Lever 3 – Back Office and RPA/AI



Of the 67 steps within process X, TPG has identified **~13 process steps** as candidates for **full automation** and **~18 process steps** as candidates for **partial automation**; Currently, the cumulation of these steps require **2.9 FTE**



## Workflow Example for Automated File Upload - Power Automate

The screenshots show the Power Automate 'AI Builder' interface. The first screenshot shows the 'Choose information to extract' step, where a table of fields is defined:

Name	Type
Customer Name	Text
Publication Number	Text
Serial Number	Text
Account Number	Text

The second screenshot shows the 'Use your model' step, where the extracted information is used to create a file. The workflow steps are:

- When a file is created
- Extract information from forms
- Create file

## Legend



Processes identified as potential candidates for full automation (i.e. manual tasks, manual workflows)

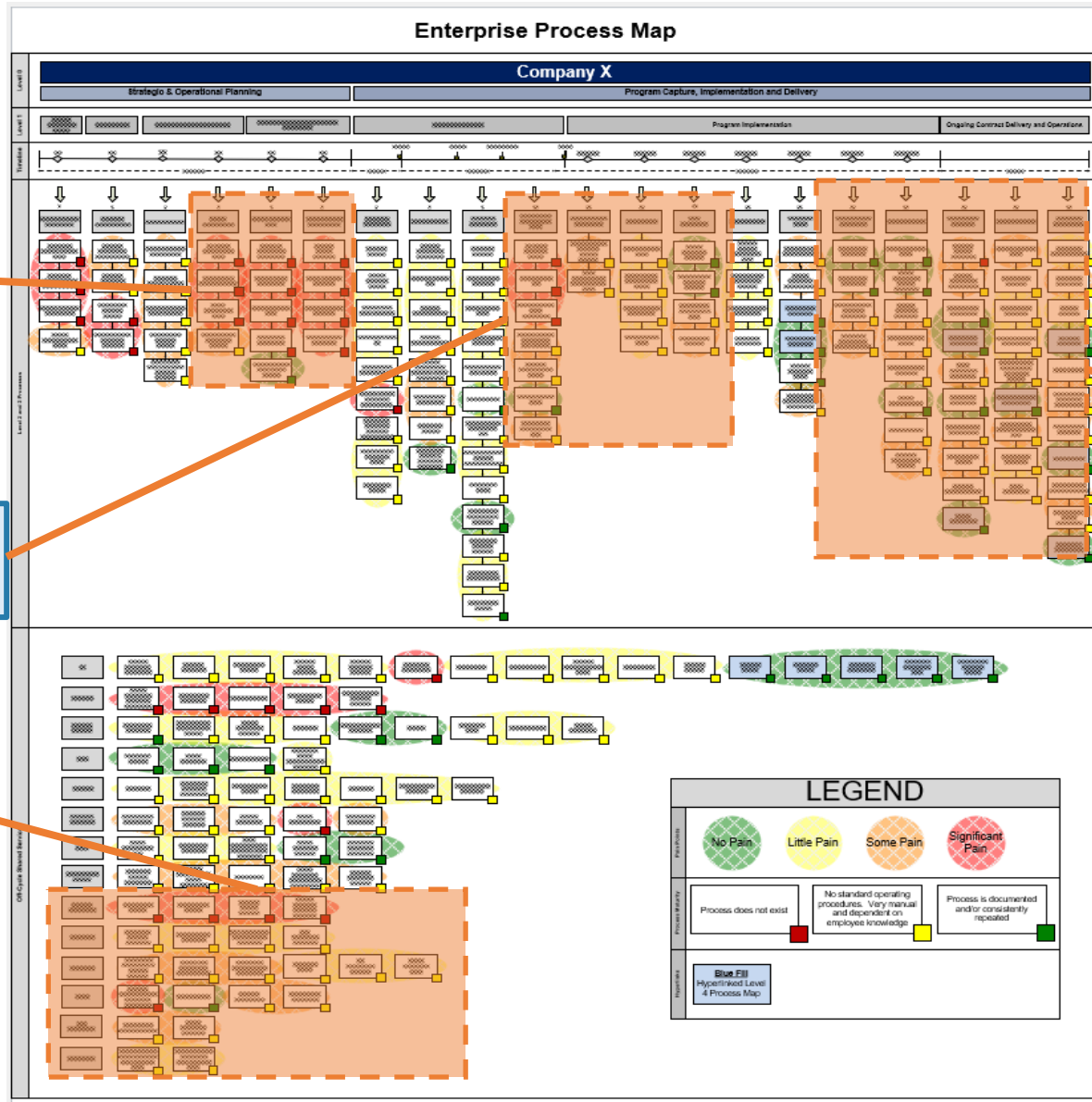


Processes identified as potential candidates for partial automation



**Rapidly Identify Processes to Automate. Leverage Tools like PowerAutomate to Join, Modify, Delete, Streamline.**

# Solution Architecture - Zooming In



Indirect Procurement

Supply Chain & Transportation

Back Office RPA & AI

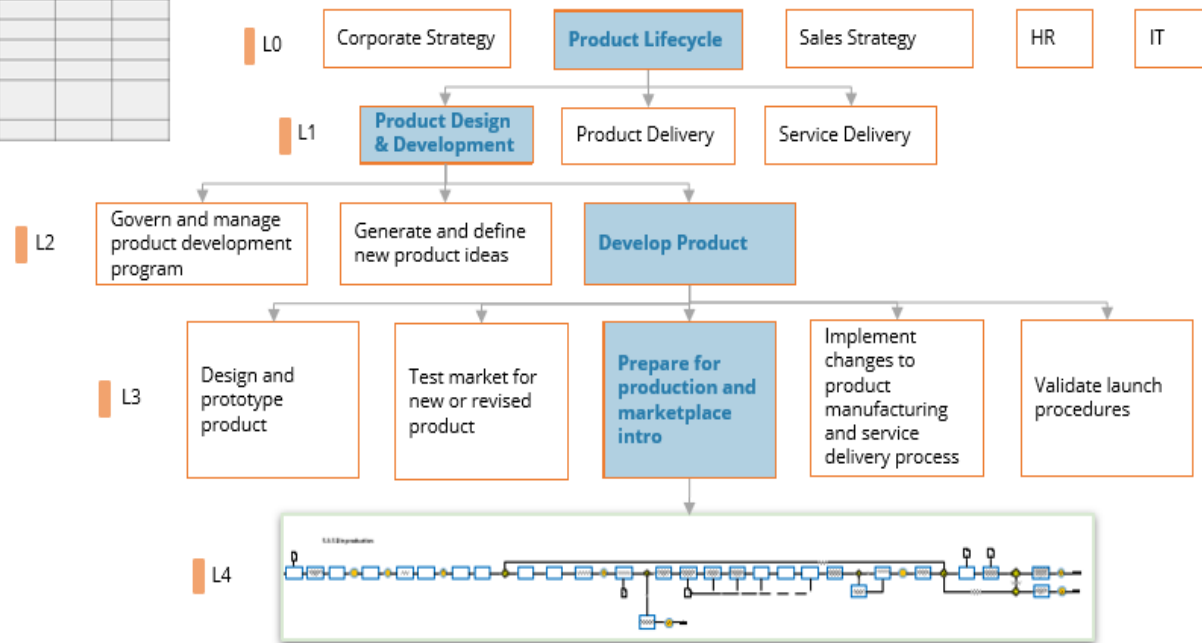
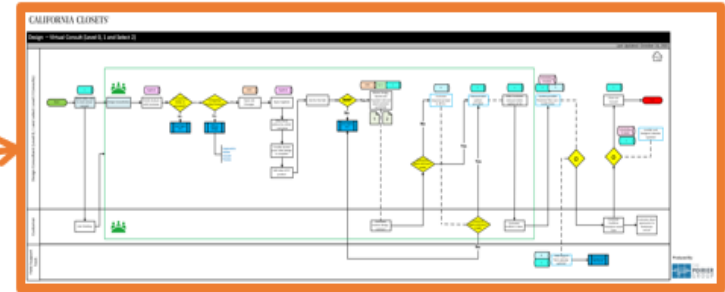
R-Matrix & Org. Design

Enterprise Initiatives & PMO/CI

# Lever 4 – R-Matrix, Org. Design



#	Level 2 Process	Level 3 / Level 4 Activities
1.01	Design	Appointment is scheduled
1.02	Design	Introductory call to client within 24 hrs of scheduled appointment
1.03	Design	Attend customer's home/virtual meeting (zoom) for design consultation
1.04	Design	Consultation (TIBEDO conversation)
1.05	Design	Book a measurement meeting if virtual consult
1.06	Design	Measure space - Take Before Photos
1.07	Design	Conduct needs analysis & discussion design options/materials
1.08	Design	Create Design
1.09	Design	Pre-complexity review?
1.10	Design	Present design to client, review, and revise
1.11	Design	Showroom appt with Client
1.12	Design	Ask for the sale
1.13	Design	Establish next steps (follow up appointments, to-do's)
1.14	Design	Stay connected with customer until sale



**Connecting Roles to Tactical Business Processes**

**Starting Point of Org. Design to Find Pockets of Duplication and Misalignment**

# Lever 4 – R-Matrix, Org. Design



#	Level 2 Process	Level 3 / Level 4 Activity	Customer	Area Director	Showroom Manager	Customer Service Manager	Customer Liaison	Office Administrator	Office Manager	RBU GM	Design Manager	Sales Manager	Sales Lead	Designer
1	1.01	Design					W							
2	1.01	Design					R							
3	1.01	Design	C			W		W	W			W	W	W
4	1.01	Design												
5	1.01	Design										R	R	
6	1.01	Design					R							AL
7	1.01	Design	C					RW						
8	1.01	Design						R, W						
9	1.01	Design						W						W
10	1.01	Design	C		W			W	W					R, W
11	1.01	Design						R, W						
1	1.02	Design												R
2	1.02	Design												R, W
3	1.02	Design												W, R
4	1.02	Design												R, W
5	1.02	Design										R	R	W
6	1.02	Design												W
7	1.02	Design												R, W
8	1.02	Design						R, W						
9	1.02	Design												W
10	1.02	Design	C											R, W
11	1.02	Design												
1	1.02	Design												

	*R*	*W*	*C*	*I*	*AB*	*AL*
1	1	1	0	0	0	0
2	1	1	1	0	0	0
3	0	7	0	0	0	0
4	0	0	0	0	0	0
5	2	1	0	0	0	0
6	1	1	0	0	0	0
7	1	1	1	0	0	0
8	1	1	0	0	0	0
9	0	2	0	0	0	0
10	2	6	1	0	0	0
11	9	21	3	0	0	0

	*R*	*W*	*C*	*I*	*AB*	*AL*
*R*	0	0	0	0	0	0
*W*	0	0	0	0	0	0
*C*	3	0	0	0	0	0
*I*	0	0	0	0	0	0
*AB*	0	0	0	0	0	0
*AL*	0	0	0	0	0	1

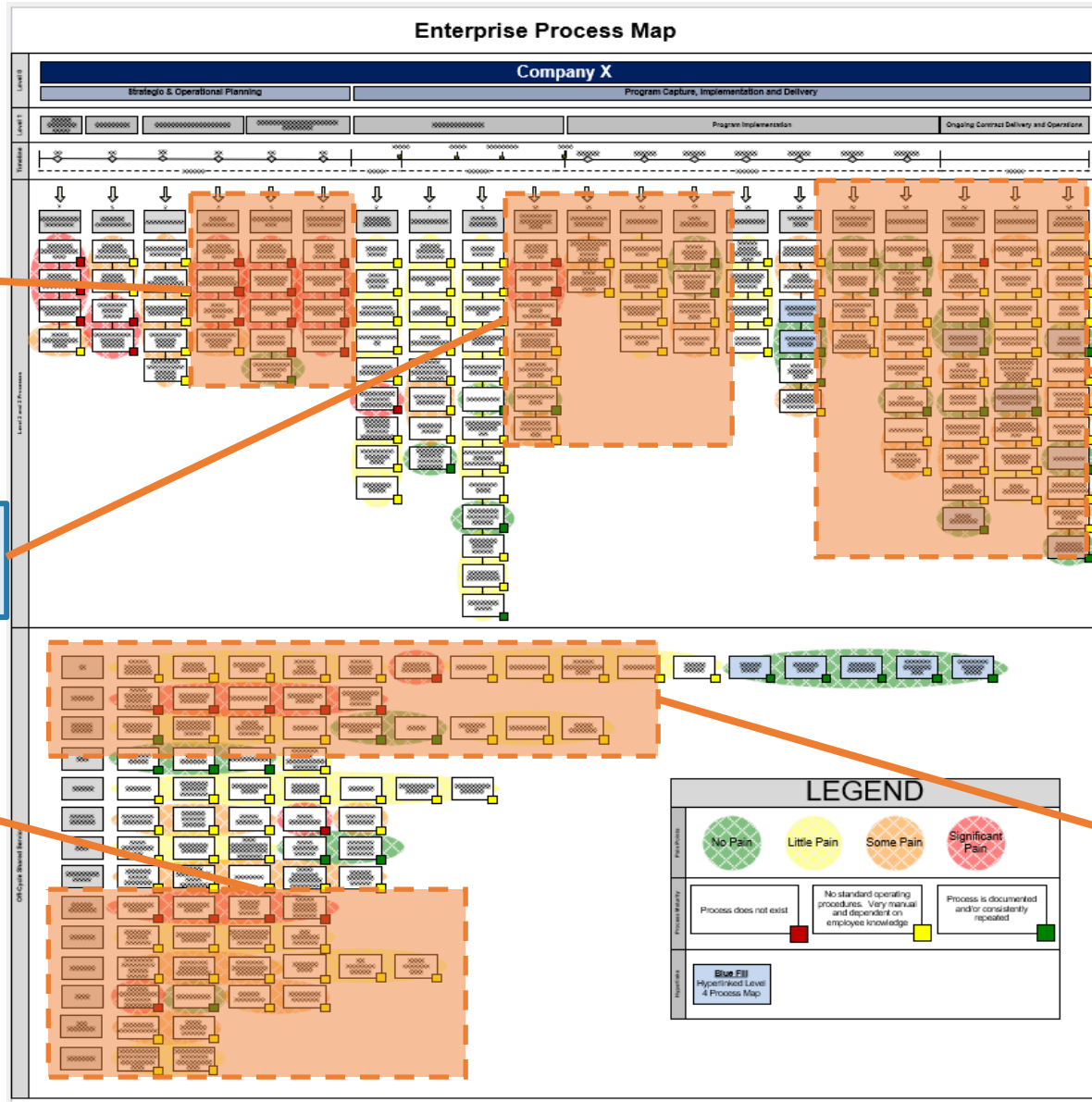
- Activity 1.01 was assigned 9 unique 'W's and 6 unique 'R's. \*Not all showing in screenshot.
- Activity 1.02 was assigned 2 unique 'W's and 4 unique 'R's.

Conversation to be had to understand the variance of remaining Rs and Ws

General alignment found - majority of Rs and Ws assigned to the same role by majority of participants.

**TPG Averages 23% in Taking Time Out Through R-Matrix Methods  
Averages 17% More Efficient Org. Design Through Hybrid Approach**

# Solution Architecture - Zooming In



**Indirect Procurement**

**Supply Chain & Transportation**

**Back Office RPA & AI**

**R-Matrix & Org. Design**

**Enterprise Initiatives & PMO/CI**



# Level 5 – Enterprise BPI/PMO and Org. Effectiveness



Reached out to key individuals for their project list

19 Respondents provided inputs

187 Initiatives provided

Categorized Projects into Key Categories

20 Categories

Identified Sub-Projects & Duplicates

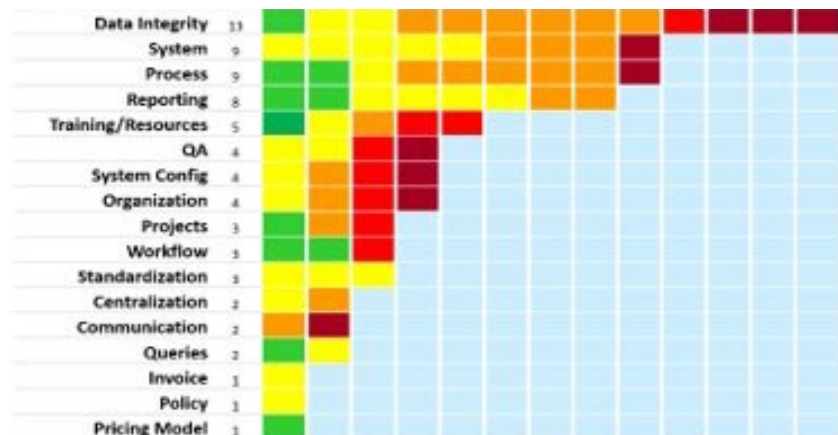
78 Duplicates & Sub-Projects

Filtered out "Planned Releases/ System Functionality Enhancements"

12 Planned Releases & System Enhancements

## = 97 Unique Projects!

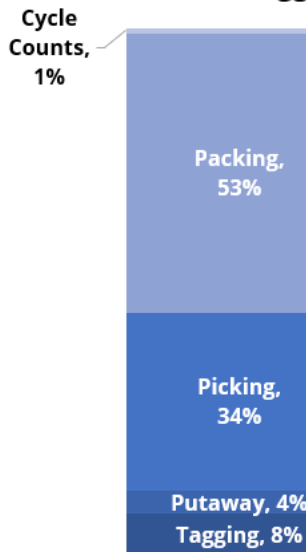
This Was a 150 Person Organization. Some Recent Org's Have Had Over 1000 Corporate Initiatives in Parallel. Thousands of Hours of Duplication



# Great Business Cases Connected to Strategy Deployment are Saving Organizations

Packing is the **critical process** within the warehouse, accounting for **53%** of the logged labour. It is also the source of significant waste, with **42% of time** identified as **nonvalue** driven work. Targeted improvements is estimated to yield a **52% reduction in pack time**.

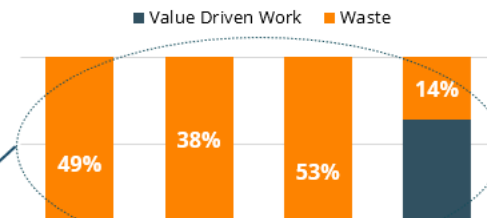
## Breakdown of Logged Hours



Allocation of resources, **87%**, heavily skewed towards outbound, especially **packing**.

Average pack time of **66 seconds per line**.

## Packing Labour Breakdown



### Logistics Efficiencies

## Reengineering Pack Process

RESOURCING:

LEVEL OF EFFORT: **LOW**

### Project Overview

In the current state, the packing process requires more than half of all labour hours in order to ensure demand is met. Observations revealed this process has multiple areas of inefficiencies and waste – from unnecessary travel to unprepared assembly areas to searching and waiting. In addition, keeping parts on the floor creates some ergonomic issues, which only compounds fatigue. Lastly, the current set up eliminates a large percentage of floor space that can be leveraged for storage.

As such, the packing process is primed for improvements and this project targets those, reengineering both the physical setup and process of packing orders. The goal is to improve workplace conditions, efficiency, and encourage a methodology that is scalable with growth.

Wave 1 aims at implementing a new "Pack Station" that will standardize assembly areas, improve material flow and ensure all required tools needed by the packers are readily available within the space. Wave 2 will focus on minimizing the number of assembly areas, transitioning from the current state of each dealer having a dedicated assembly area to a flexible model.

### High-Level Deliverables

**Wave 1:** Future state pack station to be finalized, tested and implemented.

**Wave 2:** Minimize 95 dealerships ASM's to a subset of flexible pack stations to be used for dealerships in succession.

### Charter & Project Plan

#### Finalize Design

- Finalize design with warehouse team on the floor and build out specs in AutoCAD
- Update all impacted process documentation

#### Purchase Equipment

- Submit orders for all necessary equipment to build out one future state "Pack Station"

#### Pilot

- Test proof of concept on a small scale
  - For Wave 1, test new pack station across 3 scenarios: low, mid, and high-volume dealership
  - For Wave 2, test flexible model along one DDS route; i.e., Mississauga route

#### Revised Design

- Incorporate feedback from pilot stage
- Update all impacted process documentation

#### Implementation and Training

- Implement new pack stations across all assembly areas

### Project Impact

Duration: **24 weeks**  
(wave 1 + 2)

Benefit: **7.2 (High)**

Burden: **7.1 (Low)**

% of PPs: **7.0%**

#### Qualitative Benefits

- Improved safety and ergonomics
- Improved efficiencies due to reduced fatigue while performing packing tasks
- Better visual control both within the assembly areas as well as overall for supervisors and management to observe progress
- Keeping small parts off the floor, improving cleanliness and organization
- Increased outbound quality due to streamlined material flow

#### Quantitative Benefits

- Indirect Impact: **\$204,241 / annum**
- > Range **\$175k - \$235k** or **3.1 - 4.1 FTE**
- ~52% blended improvement to pack time per line based on time study conducted by TPG.
- Potential to be converted to direct with FTE reduction.

Source: Daily Manpower Analysis from 1 to Oct 17 2022 (31 c)

Analytical Rationale  
Value Created  
ROI, Direct/Indirect  
Qualitative  
Duration, Difficulty

# Key Points (Recap)

5. Addressing areas such as **indirect procurement, supply chain, back office, org. design and enterprise effectiveness** are typical levers in many organizations (N=~11,000)

- Many commodities within Indirect Procurement can be centralized or better negotiated to find 5-15% min.
- Benchmark your supply chain and transport vendors (3-7% avg.) and examine macro supply chain scenarios (20+%)
- Find ways to leverage RPA and AI (many back office processes >20% savings)
- Consider R-Matrix on org. design (hybrid model) 17% avg.
- Examine duplication of corporate initiatives (50%+ in some cases)

6. Great business cases are saving organizations – highest and max leverage is **aligning your leadership teams** to delivering a portfolio of max ROI parallel initiatives

- Learn to create great cases for change, focused on what levers the initiative is driving
- Ensure centralization of portfolio to reduce duplication of critical org. effort
- Examine connectivity to enterprise strategy

# Agenda

11:00-11:05 Scott Tee-up

11:05-11:35 Jared Perspectives and Points of View on Innovative Best Practices for Cost and Waste Reduction

~11:35-11:50 Scott and Jared Dialogue (weaving in chat from audience)

11:50-12:00 Scott Close out and tee up upcoming webinars and ISE Annual Conference

# Questions for Jared

- You have to Learn to See 'waste', hence the title of the manual on Value Stream Mapping.
- But what I hear you saying, Jared, is that all waste isn't equal. You are calling for a more systematic approach to finding and prioritizing waste and cost reduction. Is that correct?
- This looks and sounds really complex, beyond me/us, how would an SME (Small or Medium Sized) organization launch a systematic program to improve costs and waste especially in periods like we are currently and have been experiencing?
- What are the typical benefits (realized) from methods you've overviewed in terms of improved flow, efficiency, productivity (both direct and indirect)
- More from audience for you.....

# Agenda

- 11:00-11:05 Scott Tee-up
- 11:05-11:35 Jared Perspectives and Points of View on Innovative Best Practices for Cost and Waste Reduction
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- 11:50-12:00 Scott Close out and tee up upcoming webinars and ISE Annual Conference

# Just Ahead.....

**18 April—Sneak Preview/Overview CISE**

**Performance Excellence Track** Kerri Alderman, VP Industrial Engineering, UPS; Thomas Davis, Director, Performance Services, Duke Health Systems; Scott Sink

[Register for CISE Performance Excellence Sneak Preview](#)

**5 June—Why it Matters: Reflections on Practical**

**Leadership** John White, Chancellor Emeritus, University of Arkansas

[Register for John White Webinar](#)

## **Q2 'in the works' offerings for you:**

- **Revisiting the Improvement Cycle-- Plan, Do, Study, Adjust**
- **Creating Meaningful, Insightful Organizational/Operational Scorecards and Dashboards**
- **14 July, Best Practice Case Study—Data and Analytics at University Health Network, Toronto**



IISE PERFORMANCE EXCELLENCE WEBINARS



## IISE Performance Excellence Track for Practitioners and Students


Operational Excellence, Performance Excellence, **Operational Analytics**, **Supply Chain Innovations for the 20's**, Healthcare and LifeSciences ISE Contributions, **Best in Class Case Studies**,

## Networking

**All being Developed for you for New Orleans in May 2023!!!**



 **MAY**  
20 - 23, 2023

 Hyatt Regency New Orleans  
New Orleans, Louisiana



# Performance Excellence Track: Sneak Preview and Executive Overview

## Track Coordinator



D. Scott Sink

IISE Performance Excellence and Op  
Analytics Volunteer Lead  
Facilitator/Member, CISE



18 April 2023

[Register for Performance  
Excellence 18 April](#)

## Our Panel today:



Kerri  
Alderman  
VP Industrial  
Engineering,  
UPS

<https://www.linkedin.com/in/kerri-alderman-9955734a/>

Thomas Davis,  
Director,  
Performance  
Services, Duke  
University Health  
System



<https://www.linkedin.com/in/thomas-davis-pe-mba-53b7026/>

 **ANNUAL**  
CONFERENCE & EXPO 2023



**MAY**  
20 - 23, 2023



Hyatt Regency New Orleans  
New Orleans, Louisiana

Sunday, 8-9:20      Service Systems Engineering Innovations Final Four Presentations

Sunday, 9:30-10:45 Keynote—Rick Echevarria, VP and GM of Security Sales, Intel

Engaging 80-minute sessions led by thought leaders and designed to optimize your ability to interact and contribute.

Sunday, 11:00-12:20      Challenges and Opportunities for ISE's in Healthcare and LifeSciences

Sunday, 2:00-3:20      Reengineering Supply Chains with ISE Innovations

Sunday, 3:30-4:50      Organizational/Operational Excellence and Analytics: Best Practices

Sunday, 5:00-6:20      Leadership and Student Mixer and Outstanding ISE  
Capstone Sr Design Poster Competition



## Operational & Performance Excellence Track

Scott Sink--Track Organizer/Coordinator

### Session Chairs:

#### Healthcare/LifeSciences—ISE contributions:

Victoria Jordan, Emory & Thomas Davis, Duke

#### Innovations in Supply Chain Management:

Kerri Alderman, UPS

#### Organizational & Operational Excellence and Analytics:

David Poirier, The Poirier Group

**Plus** Service Systems  
Engineering and Capstone Senior  
Design Finalists Presentations

**5 Special Sessions specifically designed for Practicing ISE Professionals, Young Professionals, Students head to Industry**





## Who We Designed the Track for:

- Industry Practitioners
- "ISE" function Leaders and Managers
- Young Professionals
- Students

## Reasons to Attend:

- Critical, hot topic sessions
- Benchmarking, learn from best in class organizations
- Networking and recruiting opportunities
- Effective, Efficient, High quality and value Learning and Development
- Actionable takeaways to Engineering Value for your Business



## Complete a Short Survey for us?

- Your Feedback is Important:



A short survey will be available to you as just prior to leaving the webinar, we'd appreciate your input.

Reach out if you have questions or other needs:

James Swisher [jswisher@iise.org](mailto:jswisher@iise.org)

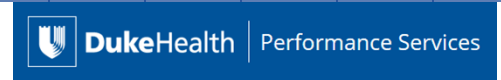
Scott Sink [ssink@jumpcurves.com](mailto:ssink@jumpcurves.com)



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ENGINEERS



Council on  
**INDUSTRIAL &  
SYSTEMS**  
ENGINEERING

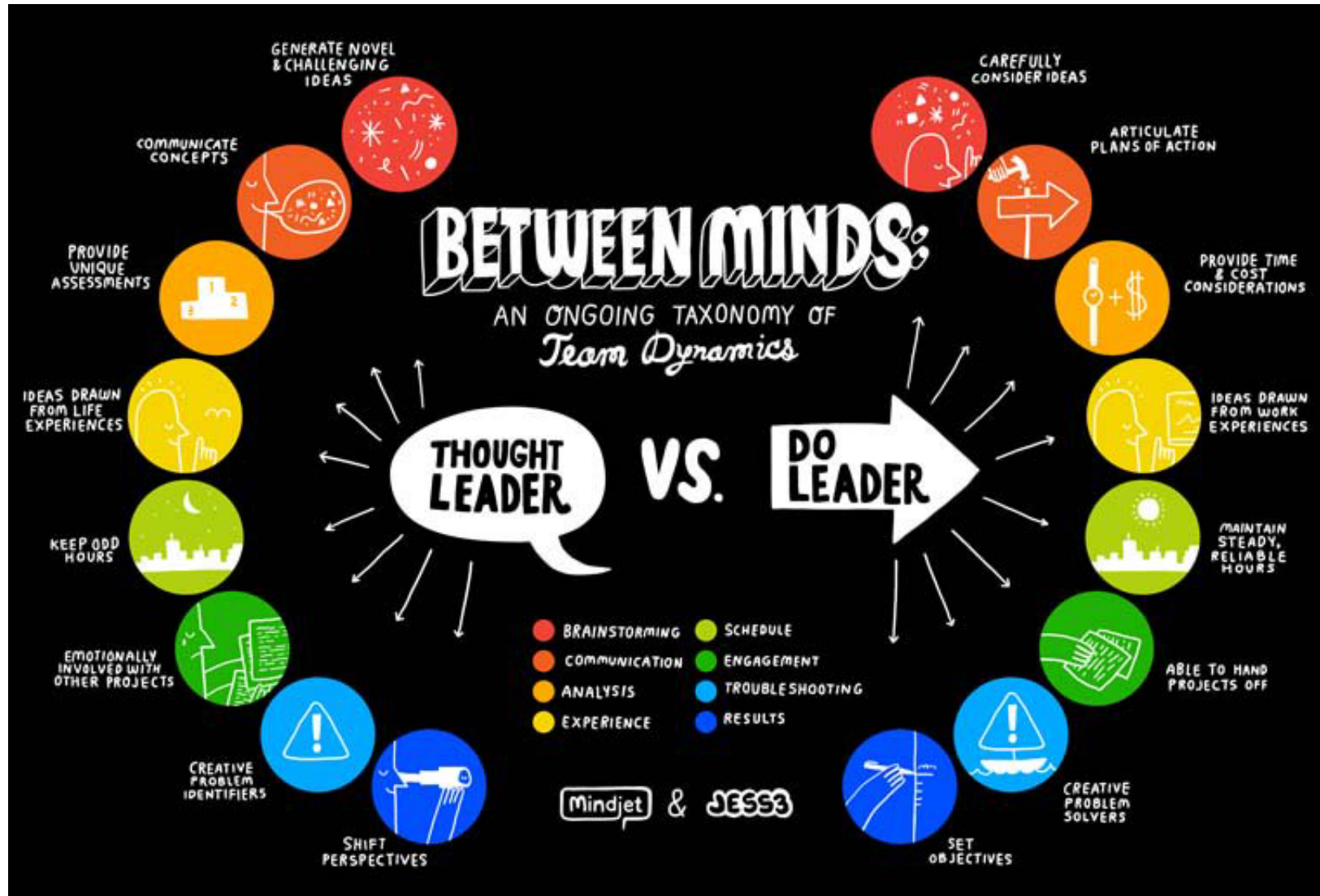


## Purpose for CISE

The **purpose** of the CISE is:

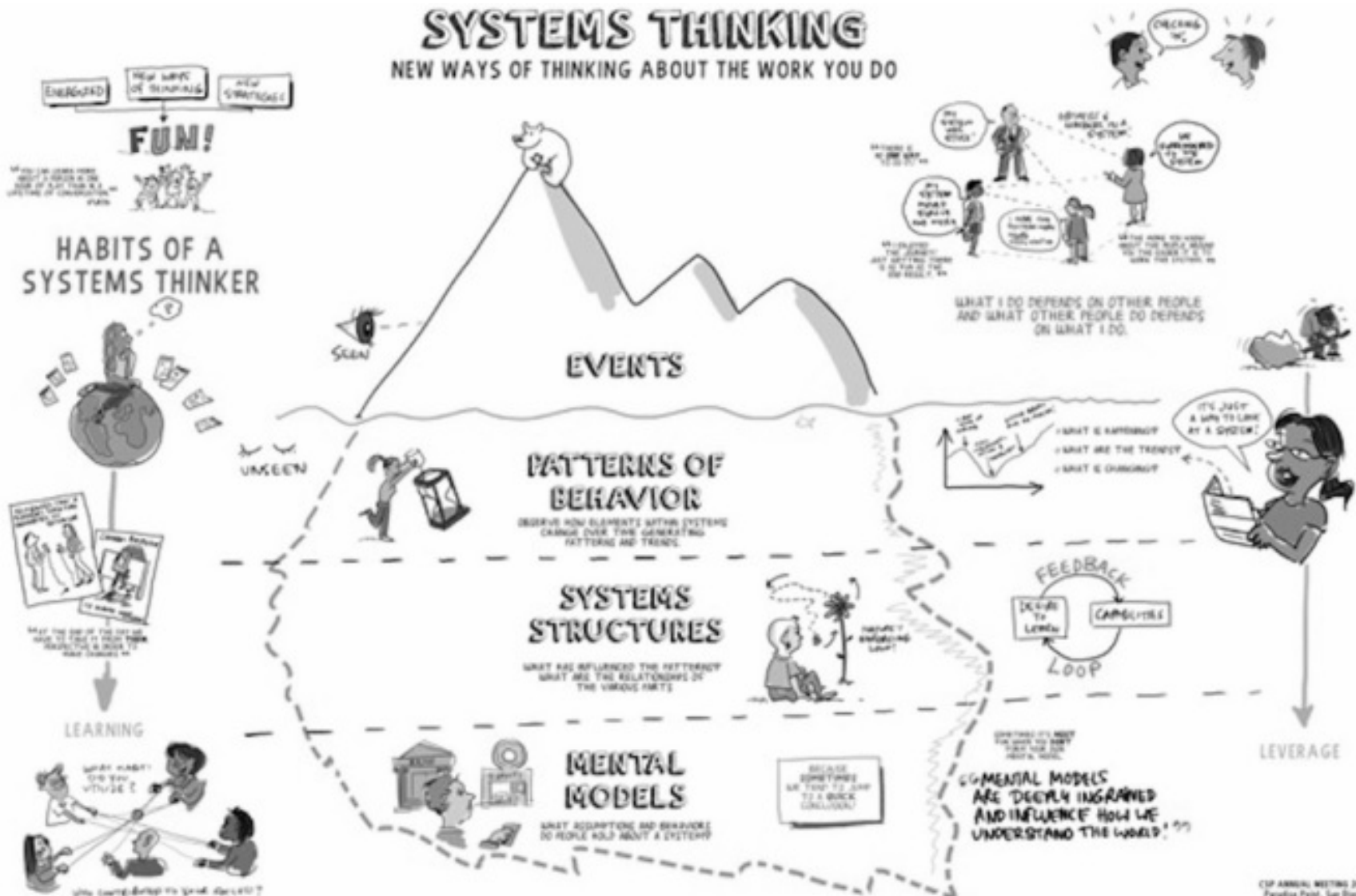
- ❑ **Foster the pursuit of Service, Learning, Integrity and Excellence.** Create an opportunity to serve and **promote the profession to academia, industry, young professionals.** Learn via benchmarking and in doing so members serve their organizations.
- ❑ To further the **sharing of information** among its members regarding best business practices and processes in the profession of industrial and systems engineering.
- ❑ To be a **forum of learning** for emerging technologies and new practices and processes through guest lectures, plant visits, and other appropriate means.
- ❑ To be an **information advisory group to IISE** and its constituent groups in support of the profession and IISE's mission and industry.
- ❑ To **Serve and Promote IISE and the Profession** in effective ways that create a win for members of CISE and their organizations and IISE and the Profession.

# CISE members are 'between minds'





# And.....Systems Thinkers



# We're looking for some new members

- Let me know if your organization might be interested in participating in this great 'Affinity Group' of ISE's.

[ssink@jumpcurves.com](mailto:ssink@jumpcurves.com)

