



20th Annual TOCICO International Conference

# A FUTURE WITH NO SHORTAGES

October 31 - November 2, 2022

## CONFERENCE PROGRAM & SCHEDULE

Learn the latest developments in how companies are leveraging the Theory of Constraints (TOC) for:

- Addressing significant improvements in supply chain
- Improving flow in operations
- Tracking Finance and Performance Measurements
- Managing Inventories to Improve Service levels
- Improving Project Management
- Aligning Technology to Support On-Going Improvement

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## About our Sponsors

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WiseTech Global is a leading developer and provider of software solutions to the logistics execution industry globally. Our customers include over 18,000 of the world's logistics companies across more than 170 countries, including 41 of the top 50 global third-party logistics providers and 24 of the 25 largest global freight forwarders worldwide. At WiseTech, we are relentless about innovation, adding over 4,900 product enhancements to our global platform in the past five years while bringing meaningful continual improvement to the world's supply chains. Our breakthrough software solutions are renowned for their powerful productivity, extensive functionality, comprehensive integration, deep compliance capabilities, and truly global reach. For more information, visit [www.wisetechglobal.com](http://www.wisetechglobal.com) and [www.cargowise.com](http://www.cargowise.com).

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CMS Montera - Specialists in software and consulting that help clients solve problems in Operations and the Supply Chain. World-leading experts in Theory of Constraints and Lean Thinking. Our RoadRunner ERP Expansion Pack improves management visibility and operational synchronization to dramatically increase productivity, revenue, and profit. Many manufacturers find their ERP (and MRP) fails at delivering on key expectations - inventories don't drop, lead times don't improve, and operational costs remain stubbornly high. RoadRunner ERP Expansion Pack can help you to finally get real results. This suite of four plugins — used individually or in concert — solve stubborn problems in operations and your supply chain, accelerate project execution and give you the insights needed to maximize sales and profitability.



Exepron was developed by four TOC practitioners, each with over 30 years of deep TOC experience in all TOC disciplines across every industry type. Exepron's Enterprise Decision Intelligent Solution, delivered on a CCPM Multi-Portfolio, Multi-Project Management Cloud Application, reduces the time between project Investment and Financial Return. Exepron clients experience a greater than 35% increase in Gross Margin with a limited Cost increase. Predictive Early Warning, unique Algorithms, predictive Resource Requirements Planning, Revenue, Cost tracking, and Earned Value plus Risk assessment provide Real-Time AI and BI Intelligence for all management levels. Over 1,200 companies have adopted Exepron's disruptive Intelligence, Low-Risk Deployment, and Ease-of-Use for Rapid Company-wide adoption in over 15 countries.



Neogrid develops solutions based on artificial intelligence to increase sales and profitability for manufacturers, retailers, and distributors. In the market for more than 20 years, it works to synchronize supply chains, focusing primarily on product mix optimization, reduced out-of-stocks, increased inventory turnover and replenishment guided by actual demand. With a platform that integrates 40,000 stores, 30,000 manufacturers and 5,000 distributors, the company transform data into strategic information to increase product availability and, at the same time, reduce excess inventory - always at the pace of consumers.

## PRE-CONFERENCE WORKSHOPS – OCTOBER 30, 2022

Time: EDT (GMT-4)	In-Person: Crystal E Online Access: Conference Lobby	In-Person: Coral A Online Access: Conference Lobby	In-Person: Coral B Online Access: Conference Lobby
3:00 PM – 7:00 PM	<b>Masterclass Chad Smith &amp; Carol Ptak</b>  <i>The Demand Driven Adaptive Enterprise Master Class</i>	<b>Masterclass Sanjeev Gupta</b>  <i>A Myth Busting Masterclass on Project Flow</i>	<b>Workshop Upgrade Mickey Granot</b>  <i>TOC Operational Solutions – Closing the Gap Between Theory Practice</i>

## DAY 1 – OCTOBER 31, 2022 CONFERENCE

Time: EDT (GMT-4)	<b>Supply Chain</b>	<b>OTHER:</b> Technology, Standing On The Shoulders Of Giants, Project Management, Management Skills	<b>Manufacturing Operations</b>
7:00 AM – 4:00 PM	In-Person Only: Registration Desk – Crystal Foyer		
8:00 AM – 9:00 AM	In-Person Only: Continental Breakfast – Crystal E		
8:45 AM – 9:00 AM	<b>WELCOME &amp; ANNOUNCEMENTS</b> In-Person: Crystal E Online Access: Conference Lobby Day 1		
9:00 AM – 9:50 AM	<b>Richard White</b> WiseTech <i>The Productivity Challenges and Opportunities in Global Supply Chain</i> In-Person: Crystal E Online Access: Conference Lobby Day 1		
10:00 AM – 10:50 AM	<b>Ian Larsen</b> WiseTech <i>TOC at The Speed of Light</i> In-Person: Crystal E Online Access: Conference Lobby Day 1		
11:00 AM – 11:50 AM	<b>James Powell</b> WiseTech <i>Implementing TOC at Scale, with Partners</i> In-Person: Crystal E Online Access: Conference Lobby Day 1		

12:00 PM- 1:00 PM	<p>In-Person: Lunch -Atrium  Online Attendee: Enjoy your one (1) hour break</p>		
1:00 PM – 1:50 PM	<p><b>Carol Ptak</b>  <i>An Introduction to the Demand Driven Adaptive Enterprise Model</i>  In-Person: Crystal E  Online Access: Day 1</p>	<p><b>Rob Newbold &amp; Matt O'Brien</b>  <i>Goal Alignment: Realizing the Potential of TOC</i>  In-Person: Coral A  Online Access: Day 1</p>	<p><b>Andy Watt</b>  <i>The TOC Solution to Warehousing</i>  In-Person: Coral B  Online Access: Day 1</p>
2:00 PM – 2:50 PM	<p><b>Caroline Mondon</b>  <i>A Future with No Missing Skills</i>  In-Person: Crystal E  Online Access: Day 1</p>	<p><b>Alfredo Mycue</b>  <i>Strengthening Democracy with Constraints Management</i>  In-Person: Coral A  Online Access: Day 1</p>	<p><b>Justin Roff-Marsh</b>  <i>Eight Uncomfortable Truths</i>  In-Person: Coral B  Online Access: Day 1</p>
3:00 PM – 3:30 PM	<p>In-Person: Beverage &amp; Snack Break – Coral Foyer  Online Attendee: Enjoy your 30-min break</p>		
3:30 PM – 4:20 PM	<p><b>Peter Thorby</b>  <i>Not Your “Grandad” Jonah’s TP Tools</i>  In-Person: Crystal E  Online Access: Day 1</p>	<p><b>Patrick Ciccarelli</b>  <i>Leveraging Theory of Constraints to Improve Sales Performance</i>  In-Person: Coral A  Online Access: Day 1</p>	<p><b>Mickey Granot</b>  <i>The TOC core processes – clearing confusions, interdependencies and effective application</i>  In-Person: Coral B  Online Access: Day 1</p>
4:30 PM – 5:20 PM	<p><b>Richard Zultner</b>  <i>The New 7 Questions for Technology (7QT): And the Search for Hidden TOC Treasure</i>  In-Person: Crystal E  Online Access: Day 1</p>	<p><b>Alejandro Fernandez</b>  <i>The Measurement Nightmare Solved with Throughput Economics Approach</i>  In-Person: Coral A  Online Access: Day 1</p>	<p><b>Roy Stratton</b>  <i>Buffer Management in Context: Managing and Reducing Instability</i>  In-Person: Coral B  Online Access: Day 1</p>
5:30 PM – 6:30 PM	<p><b>Humberto Baptista</b>  <i>Comprehensive Management</i>  Welcome Reception  In-Person: Crystal E  Online Access: Day 1</p>		

## DAY 2 – NOVEMBER 1, 2022 CONFERENCE

Time: EDT (GMT-4)	Supply Chain	OTHER: Technology, Standing On The Shoulders Of Giants, Project Management, Management Skills	Manufacturing Operations
8:00 AM – 4:00 PM	In-Person Only: Registration Desk – Crystal Foyer		
8:00 AM – 9:00 AM	In-Person Only: Continental Breakfast – Crystal Foyer		
8:45 AM – 9:00 AM	<b>WELCOME &amp; ANNOUNCEMENTS</b> In-Person: Crystal E Online Access: Conference Lobby Day 2		
9:00 AM – 9:50 AM	<b>Vitor Angelelli</b> –Neogrid <i>Use of TOC Concepts in Neogrid Solutions</i> In-Person: Crystal E Online Access: Conference Lobby Day 2		
10:00 AM – 10:50 AM	<b>Miguel Abuhab</b> <i>How to Avoid Picking to Become the Constraint</i> In-Person: Crystal E Online Access: Day 2	<b>Satoru Murakami</b> <i>Difference Between KAIZEN and Improvement to Realize "On Going"</i> In-Person: Coral A Online Access: Day 2	<b>Priscila Oliveira &amp; Webster Ramos Silva</b> <i>TOC for Global Optimization in Engineering Resource</i> In-Person: Coral B Online Access: Day 2
11:00 AM – 11:50 AM	<b>Dr. Rakesh Sinha</b> <i>No Shortages Even in Volatile Demand Scenarios</i> In-Person: Crystal E Online Access: Day 2	<b>Daniela Avancini &amp; Miguel Abuhab</b> <i>Innovative Education for a World with Sustainable Future</i> In-Person: Coral A Online Access: Day 2	<b>Danny Walsh</b> <i>Beyond Critical Chain</i> In-Person: Coral B Online Access: Day 2
12:00 PM – 1:00 PM	In-Person: Lunch – Atrium Online Attendee: Enjoy your one (1) hour break		



<p>1:00 PM – 1:50 PM</p>	<p><b>John Thompson</b>  <i>It's Not Complicated – Essentials: Successfully Schedule and Deliver a Portfolio of Complex Routings and Projects</i>  In-Person: Crystal E  Online Access: Day 2</p>	<p><b>Jarrod Saxton</b>  <i>Developing Superhero People Who Have Winning Mindsets, Long-Term Commitment and Always do Their Best work</i>  In-Person: Coral A  Online Access: Day 2</p>	<p><b>Philip Marris</b>  <i>Quality Control is Often the Bottleneck in Operations</i>  In-Person: Coral B  Online Access: Day 2</p>
<p>2:00 PM – 2:50 PM</p>	<p><b>Andy Watt &amp; Simon White</b>  <i>How Large Corporates Can Implement Change Effectively</i>  In-Person: Crystal E  Online Access: Day 2</p>	<p><b>James Heimuli</b>  <i>Community Regeneration: Shifting Society to a Future with No Shortages of Health and Wellbeing Services</i>  In-Person: Coral A  Online Access: Day 2</p>	<p><b>Kaoru Watanabe</b>  <i>Learning From Failure and Various Giants. TOC &amp; CCPM is Necessary But Not Sufficient for “Product &amp; Service Development” Project</i>  In-Person: Coral B  Online Access: Day 2</p>
<p>3:00 PM – 3:30 PM</p>	<p>In-Person: Beverage &amp; Snack Break – Coral Foyer  Online Attendee: Enjoy your 30-min break</p>		
<p>3:30 PM – 4:20 PM</p>	<p><b>John Thompson &amp; Danny Walsh</b> – Exepron  <i>Demonstrating an Advanced (Enterprise) CCPM Solution</i>  In-Person: Crystal E  Online Access: Conference Lobby Day 2</p>		
<p>4:30 PM – 5:20 PM</p>	<p><b>Jindal Steel Presentation</b>  <i>Transformation Journey of Jindal Steel Over the Last 7 Years</i>  In-Person: Crystal E  Online Access: Conference Lobby Day 2</p>		
<p>5:30 PM – 6:30 PM</p>	<p><b>Annual General Membership Meeting</b>  In-Person: Coral B  Online Access for TOCICO Members Only: Conference Lobby Day 2  <a href="https://www.tocico.org/general/custom.asp?page=AnnualMembershipMeeting2022">https://www.tocico.org/general/custom.asp?page=AnnualMembershipMeeting2022</a></p>		
<p>6:30 PM – 8:30 PM</p>	<p><b>Special Presentation by Rami Goldratt</b>  Awards Ceremony In-Person  Dinner: Crystal E  Online Access: Conference Lobby Day 2</p>		

## DAY 3 – NOVEMBER 2, 2022

### CONFERENCE AND POST-CONFERENCE WORKSHOPS

Time: EDT (GMT-4)	Supply Chain	OTHER: Technology, Standing On The Shoulders Of Giants, Project Management, Management Skills	Manufacturing Operations
8:00 PM – 1:00 PM	In-Person Only: Registration Desk – Crystal Foyer		
8:00 AM – 9:00 AM	In-Person Only: Continental Breakfast – Crystal Foyer		
8:45 AM – 9:00 AM	<b>WELCOME &amp; ANNOUNCEMENTS</b> In-Person: Crystal E Online Access: Conference Lobby Day 3		
9:00 AM – 9:50 AM	<b>Sanjeev Gupta</b> <i>Math vs Physics of Flow- What Makes TOC so Powerful, yet so Difficult to Embrace</i> In-Person: Crystal E Online Access: Conference Lobby Day 3		
10:00 AM – 10:50 AM	<b>Jack Warchalowski &amp; Duncan Patrick</b> CMS Montera <i>What to Invest in Technology or Benefits? – How an ATV Master Distributor Reimagined its Supply Chain</i> In-Person: Crystal E Online Access: Conference Lobby Day 3		
11:00 AM – 11:50 AM	<b>Christoph Lenhartz</b> <i>Creating Stable and Predictable Operations with a Demand Driven Operating Model</i> In-Person: Crystal E Online Access: Day 3	<b>Uwe Techt</b> <i>More Projects in Less Time</i> In-Person: Coral A Online Access: Day 3	<b>Workshop</b>  <b>CMS Montera</b> <i>Goal Simulation Workshop</i> In-Person: Coral B Online Access: Conference Lobby
12:00 PM – 1:00 PM	Online Attendee: Enjoy your one (1) hour break In-Person: Lunch – Atrium		

<p>1:00 PM – 5:00 PM</p>	<p><b>Workshop</b></p> <p><b>Humberto Baptista</b>  <i>Retail Myths and Reality -  A Hands-On Workshop</i></p> <p>In-Person: Crystal E  Online Access:  Conference Lobby</p>	<p><b>Masterclass</b></p> <p><b>Lisa Scheinkopf</b>  <i>Assumption Hacking - A  TOC Thinking Master Class</i></p> <p>In-Person: Coral A  Online Access:  Conference Lobby</p>	<p><b>Workshop</b></p> <p><b>CMS Montera</b>  Goal Simulation  Workshop</p> <p>In-Person: Coral B  Online Access:  Conference Lobby</p>
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## **Awards Ceremony Presentation: Tuesday, November 1**



### **Special Presentation – Eli Goldratt’s Legacy**

*Presented by Rami Goldratt*

**SUMMARY** Rami Goldratt will be joining our conference for a presentation at the awards celebration dinner on Tuesday, November 1st. It has been 21 years since Rami’s father, Eli gathered the world of TOC in October of 2001 to decide how to organize the TOC Community. The result was the formation of TOCICO on February 15, 2002. Now on the 20th anniversary of TOCICO, Rami will share his thoughts and reflections on the advancements in TOC, respecting his father’s desire that we not stand in his shadow, but rather to stand on his shoulders to advance TOC, and leveraging its ability to collaborate with all improvement efforts.

**SPEAKER BIO** Rami Goldratt currently serves as CEO of Goldratt Consulting. Over the years, Rami has been involved in consulting engagements with retail, automotive, textile, chemical, and service industries all around the world. Rami is considered one of the most influential leaders of the TOC body of knowledge, specifically in Sales and Marketing, where his work has become standard practice. Rami is also among the pioneers in developing and implementing TOC applications for the education system – guiding of teachers around the world in applying the TOC thinking Processes for children’s education.

"I'm honored to work hand-in-hand with such a group of professionals who are dedicated to build on my father's legacy."

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## **Pre-Conference Workshops: October 30, 2022 from 3-7 PM EDT**



### **TOC Operational Solutions - Closing the Gap Between Theory and Practice**

*Presented by Mickey Granot*

**SUMMARY** As clear as the TOC solutions may seem to be, when implementing them they require non-negligible adjustments and modifications. What are those? and how to do the right? Over the years the TOC body of knowledge has been progressing mostly through individual experiences. The formal BOK stayed pretty much the same (many still even consider "The Goal" to be valid). The fact is that as the core concepts remain valid, the practical way to implement them has evolved a lot, and within each and every individual implementation adjustments and modifications are needed. What is the up-to-date "theoretical" configuration of the solutions? What in them needs to be adjusted in implementations and what should not? The presentation will discuss the concept and demonstrate through an example.

**SPEAKER BIO** Mickey Granot has been a TOC practitioner for 30 years now. Mickey spent many years working as Eli Goldratt's right-hand-man in developing the TOC body of knowledge and disseminating it to consultants and customers globally, and eventually was the CEO of Goldratt Group. Since he left the Goldratt Group, Mickey dedicated his attention into continuous development of the knowhow and its practical aspects helping customers globally achieve and sustain breakthrough performance in operations and business.



### **A Myth Busting Masterclass on Project Flow**

*Presented by Sanjeev Gupta*

**SUMMARY** With the help of thought experiments and simulations, attendees will learn that:

- CCPM is missing the real breakthrough required to deliver projects faster and on time
- Uncertainty and variability are just a distraction, not the primary contributor of project delays
- The primary contributor of projects delays is resources not working on tasks in the right order
- There is power in software but also key limitations in determining resource priorities
- There's a simple way to quickly improve project flow, no matter what software you use

**SPEAKER BIO** Sanjeev Gupta has founded two TOC based software companies, Thru-Put Technologies and Realization Technologies. Thru-Put was a category leader in advanced planning and scheduling for complex manufacturers, and Realization has delivered more than \$7 billion of value to its customers for helping them finish their projects faster. His latest venture is the Center for Flow Based Management.

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## Pre-Conference Workshops: October 30, 2022 from 3-7 PM EDT



### The Demand Driven Adaptive Enterprise Master Class

*Presented by Carol Ptak & Chad Smith*

**SUMMARY** Businesses are dying faster than ever as they fail to drive adaptation to an increasingly more complex and volatile set of circumstances. Management is starving for relevant information, much of which is obscured and distorted by antiquated models, methods, rules and tools held over from decades past. What will it take to change this? This workshop reveals a new management framework that enables a flow-based system of management to drive return on investment performance and adaptation for sustainability and improvement in the longer range. The new framework is called the Demand Driven Adaptive Enterprise (DDAE) Model. The Demand Driven Adaptive Enterprise (DDAE) Model spans the operational, tactical and strategic ranges of an organization allowing it to continuously and successfully adapt to the complex and volatile supply chains we see today. It combines the fundamental principles of flow management with the emerging new science of complex adaptive systems (CAS). It is the way that successful businesses will work in the 21st Century. This half day workshop will prove a compelling need for change, demonstrate fundamental solution principles and reveal a blueprint to transform the entire enterprise. Businesses are dying faster than ever as they fail to drive adaptation to an increasingly more complex and volatile set of circumstances. Management is starving for relevant information, much of which is obscured and distorted by antiquated models, methods, rules and tools held over from decades past. What will it take to change this? This workshop reveals a new management framework that enables a flow-based system of management to drive return on investment performance and adaptation for sustainability and improvement in the longer range. The new framework is called the Demand Driven Adaptive Enterprise (DDAE) Model. The Demand Driven Adaptive Enterprise (DDAE) Model spans the operational, tactical and strategic ranges of an organization allowing it to continuously and successfully adapt to the complex and volatile supply chains we see today. It combines the fundamental principles of flow management with the emerging new science of complex adaptive systems (CAS). It is the way that successful businesses will work in the 21st Century. This half day workshop will prove a compelling need for change, demonstrate fundamental solution principles and reveal a blueprint to transform the entire enterprise.

**SPEAKER BIOS** Carol Ptak is currently a partner with the Demand Driven Institute ([www.demanddriveninstitute.com](http://www.demanddriveninstitute.com)) and was most recently at Pacific Lutheran University as Visiting Professor and Distinguished Executive in Residence. Previously, she was vice president and global industry executive for manufacturing and distribution industries at PeopleSoft where she developed the concept of demand driven manufacturing (DDM). Ms. Ptak spent four years at IBM Corporation culminating in the position of global SMB segment executive. A leading authority in the use of ERP and Supply Chain tools to drive improved bottom line performance, Ms. Ptak's expertise is well grounded in four decades of practical experience as a successful practitioner, consultant and educator in manufacturing operations. Her pragmatic approach to complex issues and dynamic presentation style has her in high demand worldwide on the subject of how to leverage these tools and achieve sustainable success.

Chad Smith is the coauthor (with Carol Ptak) of the third edition of Orlicky's Material Requirements Planning (McGraw-Hill, 2011) and Demand Driven Material Requirements Planning (Industrial Press, 2016) and Precisely Wrong –

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## **Pre-Conference Workshops: October 30, 2022 from 3-7 PM EDT**

Why Conventional Planning Fails and How to Fix It (Industrial Press 2017). He is also the coauthor (with Debra Smith) of Demand Driven Performance: Using Smart Metrics (McGraw-Hill, 2014). He is a cofounder of and partner in the Demand Driven Institute, an organization dedicated to proliferating demand driven methods throughout the world. In 1997 Mr. Smith co-founded Constraints Management Group (CMG), a services and technology company specializing in demand driven manufacturing, materials, and project management systems for midrange and large manufacturers. He served as Managing Partner of CMG from 1998 to 2015. Clients, past and present, include Unilever, LeTourneau Technologies, Boeing, Intel, Erickson Air-Crane, Siemens, IBM, The Charles Machine Works (Ditch Witch), and Oregon Freeze Dry. Mr. Smith is also a certified expert in all disciplines of the Theory of Constraints, studying directly under the tutelage of the late Dr. Eli Goldratt.

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## Post-Conference Workshops: November 2, 2022 from 1-5 PM EDT



### **Retail Myths and Reality – A Hands-on Workshop**

*Presented by Humberto Baptista*

**SUMMARY** The retail environment is full of myths that prevent proper functioning and perpetuate damaging modes of operation – pushing inventories is just one of them. In this workshop, we'll investigate myths in four broad categories – stockouts, surpluses, time and technology – and how to replace them with reality using TOC.

**SPEAKER BIO** Humberto R. Baptista: is a Synergist, Vectis Solutions CEO, a TOCICO Lifetime Achievement Award recipient (2019), served as strategic advisor to Neogrid, participated as a member of the TOCICO Board of Directors, Goldratt Group among others. Led Viable Vision projects on Consumer Goods, Retail, manufacturing, projects and services, taught TOC VV Application Experts and Project Leaders worldwide. Current interests: TOC Principles, Implementations by S&Ts, advanced TOC Finance, TOC Retail, TOC NPO (Government, Health and Education) and TOC4E



### **Assumption Hacking: A TOC Thinking Masterclass**

*Presented by Lisa Scheinkopf*

**SUMMARY** Assumption Hacking is a critical skill for solving problems, eliminating conflicts, learning from our mistakes, understanding others and understanding ourselves.

If you'd love to learn how to "Think Like Jonah" – without the need to learn a laundry list of logic modeling techniques, join Lisa for a meaningful and fun learning experience the afternoon of November 2nd!

The workshop includes cases, discussions, and plenty of exercises. Here is a quick overview of the workshop agenda:

- What and Why is Assumption Hacking
- The Assumption Hacker's Mindset
- Assumption Hacking an idea – and apply to an idea you would love to implement.
- Assumption Hacking an action – and apply to an action you intend to take.
- Assumption Hacking a surprise – what to do when reality doesn't serve up what you expected.

**SPEAKER BIO** Lisa Scheinkopf – aka JonahLisa – founded Jenrada LLC in 2019. Lisa and her company focus on helping people remove their barriers to achieving much of what matters to them and become much more fulfilled by helping them focus, think, and communicate. Lisa has been at the forefront of TOC for more than 30 years and worked directly with Dr. Eliyahu Goldratt on the development of the TOC Thinking Process. After that she authored "Thinking for a Change: Putting the TOC Thinking Process to Use," which was personally endorsed by Dr. Goldratt. Lisa was a Partner at Goldratt Consulting for over 14 years before founding Jenrada. Her responsibilities with Goldratt

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## **Post-Conference Workshops: November 2, 2022 from 1-5 PM EDT**

included leading the company's consulting practice in North America and India, and she headed the Goldratt School. Lisa is a past TOCICO Chairperson, and a 2018 recipient of the TOCICO Lifetime Achievement Award. Lisa lives in Phoenix, Arizona with her husband Danny, where they raised their two daughters. When Lisa is not focused on helping others focus, you'll find her zooming with family and friends around the globe, participating in the local arts and music scene, and supporting charitable causes such as brain cancer research.



### **The Goal Simulation Workshop**

*Presented by Jack Warchalowski & Duncan Patrick*



**SUMMARY** If you are an Executive or a Manager in a Manufacturing Organization this hands-on workshop is for you. It will teach you and your management team via a realistic, hands-on production simulation, how to use the techniques outlined in the Goal to increase productive capacity, improve on-time delivery, decrease inventory, reduce costs, and maximize net profit. For more info, please click this link - <https://cmsmontera.com/goal-workshop/>

**SPEAKER BIOS** Jack Warchalowski is the CEO of CMS Montera Inc. CMS Montera specializes in software and consulting that helps clients solve problems in Operations and the Supply Chain. Jack helps organizations enhance their profitability and competitive position through the implementation of strategic improvement initiatives driven by CMS RoadRunner software. Jack is a Certified Management Consultant and a Professional Engineer registered in Ontario. He holds an MBA degree from the Wilfrid Laurier University and a Bachelor of Applied Science in Mechanical Engineering from the University of Waterloo in Waterloo, Ontario. In addition, Jack is certified by the TOCICO in all aspects of TOC.

Duncan Patrick is Executive Vice President of CMS Montera Inc. CMS Montera specializes in software and consulting that helps clients solve problems in Operations and the Supply Chain. Duncan's business consulting career is focused on working with clients to assist them solve problems in operations and the supply chain related to lead times, the forecast, inventory, capacity, on time delivery, product development speed and market focus. Duncan holds an MBA degree from the Richard Ivey School of Business, Western University and a Bachelor of Commerce degree from The University of Calgary. Duncan is certified by the Theory of Constraints International Certification Organization in all aspects of TOC. In addition, Duncan is a Certified Management Consultant.



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## Supply Chain



### The Productivity Challenges and Opportunities in Global Supply Chain

*Presented by Richard White*



**SUMMARY** The global logistics industry has its origins in sail and horse and cart and while these modes of transport have long since been replaced, many of the work practices of the industry still have carry over from those days. International trade, in particular, is controlled by the myriad of regulations that governments have implemented which adds additional inertia to improving productivity. Today, the industry is still very much mired in cost world thinking, where margins on individual shipments and trade lanes are dominant. Making a meaningful change to the productivity of global supply chains will require considered thought, innovation and massive action on a global scale.

**SPEAKER BIO** Richard White CEO and Founder Richard has been CEO and an Executive Director of WiseTech Global since founding the company in 1994. Richard has more than 35 years of experience in software development, embedded systems and business management and over 25 years of freight/logistics industry experience. Prior to founding WiseTech Global, Richard was founder and managing director of Real Tech Systems Integration (a provider of computer consulting and systems integrations services) and founder and CEO of Clear Group (a distributor of computer related equipment). Richard holds a Master of Business in Information Technology Management from the University of Technology, Sydney (UTS). He is a UTS Luminary and a Fellow of UTS.



### How to Avoid Picking to Become the Constraint

*Presented by Miguel Abuhab*



**SUMMARY** To reduce inventory, it has been necessary to reduce the Order Lead Time, increasing the number of pickings in the warehouse. The undesirable effect is the delay on deliveries causing stock outs and increasing inventories on stores. This presentation will explain how to successfully reduce inventory maintaining the same number of pickings, avoiding picking to become the Constraint. Most of the companies have their logistic infrastructure based on their current distribution, or ERP system. Warehouse, trucks, routes and receiving docks at the store are balanced with the current parameters system. Implementing other systems like DBM to reduce inventory will probably reduce the Order Lead Time then increasing the number of pickings and all related work on the docks and stores. If the infrastructure in the warehouse is not dimensioned to a higher volume of pickings, then delays on the deliveries will occur causing stock outs on the stores, and DBM will increase the target level of inventory. To manage well, we must reduce inventory and avoid delays on deliveries to the stores. The conflict is: Reduce Order Lead Time or Maintain the Number of Pickings? The need to Reduce Order Lead Time is to reduce inventory; on the other hand, the need to Maintain the Number of Pickings is to Avoid Picking Becoming a Constraint. When the warehouse is the constraint, the adherence to the orders issued by the system is very low. The orders are not

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## Supply Chain

delivered according to the expected quantity, neither the expected date. It is necessary to monitor the adherence of the warehouse to the orders issued by the system. Most of the companies have excess inventory in some stores and shortage in others. When the Inventory Turns is very low, a long time will be needed to bring the inventory to the right level. To speed up in order to reach the right inventory level an algorithm was created to transfer inventory between stores. On the presentation we will show how to reduce inventory keeping the same number of pickings, increasing the adherence indicator, and the benefit to transfer inventory between stores Avoiding Picking to Become a Constraint.

**SPEAKER BIO** Miguel Abuhab is a mechanical engineer, graduated from ITA - Aeronautics Institute of Technology. In 1999, he founded NeoGrid, a provider of Supply Chain Management (SCM) software solutions, which has become a leading provider in Brazil, listed on stock market in December 2020. Currently holds the position of Chairman of the Board. Since 2003, Abuhab has worked on its Tax Simplification Plan for Brazil - Abuhab Model of VAT Collection - which served as the basis for the Tax Reform Report approved in December. In 2019, he presented his Plan to the CCJ - Constitution, and Justice Commission, which amends the National Tax System. About the subject, he wrote books which addresses tax reform to unlock Brazil and sustain growth and social inclusion. Abuhab incorporates in his business expertise the Theory of Constraints (TOC), developed by Eliyahu Goldratt, and ideas related to the supply chain. He also works strongly in social responsibility projects, focused on education. The TOCFE (TOC for Education) program, sponsored by the Miguel Abuhab Institute (IMA), has trained 200 volunteer teachers in 20 public schools in Joinville, serving more than 5,000 children.



### Use of TOC Concepts in Neogrid Solutions

*Presented by Vitor Angelelli*



**SUMMARY** In this presentation two particularly important TOC concepts that are used in Neogrid solutions will be covered: Dynamic Buffer Management (DBM) and Mafia Offer. DBM enables the Neogrid solutions to dynamically manage our customers' inventories, automatically adjusting buffers according to end consumer demand. Therefore, Neogrid offers the necessary resources for a better interpretation of seasonality and sudden changes in retail demands. The concept Mafia Offer allows our customers to analyze performance of their operations through indicators such as TVD and IVD, thus, they can monitor the gains that retailers have when using our solutions.

**SPEAKER BIO** Vitor Angelelli is an experienced supply chain professional with a demonstrated history of working in the information technology and services industry. He is skilled in business planning, customer relationship management, market research, management, and sales plan. He is a strong engineering professional with a Marketing degree. Vitor is currently the head of operations of Neogrid in North America, performing his role in Fort Lauderdale office.

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## Supply Chain



### **A Future with No Missing Skills**

*Presented by Caroline Mondon*

**SUMMARY** In an increasingly complex world, the ability of companies to adapt their skills is crucial for their survival and for the personal growth of their employees. The Demand Driven Skills Model (DDSM) allows companies to visually detect the missing skills and to quickly and systemically adapt in order to meet the challenges of a demand driven business. Much has been written about how to manage stock, time and resource capacity with a demand driven approach, but what about the people and skills that it takes to maintain and sustain a Demand Driven Adaptive Enterprise? Missing skills can slow down or even stop the flow, thus turning into a bottleneck. This presentation introduces the Demand Driven Skills Model (DDSM), which allows to decide where to locate and how to size skill buffers depending on priorities in order to better protect the flow in all departments of a company. Then, further innovations to implement a competitive strategy can be identified, prioritized and translated into requirements for the evolution of skills and new jobs. The DDSM includes 5 components: (1) position current skills and skill holes, (2) develop internal trainers able to maintain continuous improvement, (3) evaluate training priorities to fill skill holes when facing variability of demand, (4) introduce innovation, and (5) pull and adapt skills to support the strategy. Key elements are: - The four-level Multiskills Matrix (Student, Operational, Expert, Trainer) showing for each skill respectively 1, 2, 3 or 4 green squares for each employee performing this skill - A team of internal trainers collaborating with management - A color legend allowing to evaluate the risk for flow and to support innovations - The Competency Competitiveness Plan describing the skills required to reach strategical targets over the next 3 years - Visual and continuous recognition of employees who expand their skills i.e. gaining new green squares The maturity of skills is analyzed along 3 types and 5 groups of processes: operational demand driven processes (Marketing-Sales & Supply Chain), supporting processes (Finance & HR) and a formalizing process (Total Quality). This analysis helps visualizing priorities for top management, e. g., hiring decisions or the allocation of financial resources to train employees in the strategic side of Sales & Operations Planning. During each Sales & Operations Planning cycle, top management can systematically update decisions regarding skills based on the evaluation of the priorities in these process groups. The DDSM is a proven visual, demand driven, systemic approach that contributes to managing the cultural change towards an adaptive and learning company. It can be applied in any size of flow focus business and type of industry.

**SPEAKER BIO** Caroline MONDON CFPIM, CIRM, CSCP, AEF, DDPP, DDL, NLP Master Partitioner, Certified Board Member Extensive experience of operations management in manufacturing companies, with 2 positions of plant manager in a mechanical and an electrical SME and a position of Supply Chain & Logistics director across 7 countries in a multinational. Implementation of Supply Chain functions in SME, expertise in Sales & Operations Planning process. Certified board member including past president of AfrSCM. APICS, DDI Instructor and co-author of the Adaptive Enterprise Foundations and of 'The Fresh Connection serious game A DD S&OP experience'. Designer of the 4th buffer: skill described in the appendixes of the Demand Driven Adaptive Enterprise and the Adaptive Sales and Operations Planning. Author of a Demand Driven Detective novel "The Missing Links" (Industrial Press USA 2016). Currently executive coach at VISCONTI Partners to challenge leaders having a strong desire to develop themselves as well as their organization.

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## Supply Chain



### Implementing TOC at Scale, with Partners

*Presented by James Powell*



**SUMMARY** The opportunity, to implement TOC at scale in the Logistics Industry with Productivity Partners, requires that we can implement TOC at the speed of light using a series of Atomic Changes which are safe, understandable, and resistant to reversal. Analysis of Logistics many clients, simultaneously, using 'TOC at the Speed of Light' produces a customized and co-authored implementation plan that is very consistent across an industry. It is then possible to execute those 'unique' plans using standardized project chunks which we call Atomic Changes. Clients can assemble the atomic changes and execute their plans with strong and standardized guides, outcomes and measurements, to produce rapid, stable and measurable outcomes.

**SPEAKER BIO** James Powell is a Productivity Expert at both WiseTech Global and ViAGO, an investor and an entrepreneur. With a background in corporate information technology, since 1994 James has worked exclusively with breakthrough effectiveness technologies, including Theory of Constraints (TOC) and Behavior-based Performance Management. James is certified in the constraint management solutions developed by the Avraham Y Goldratt Institute. In 1995 James founded ViAGO, and first met WiseTech Global in 2005, when WiseTech executives attended ViAGO's Black Belt in Thinking Boot Camp. James has worked with WiseTech since 2012 designing the PAVE Productivity software, and codifying the TOC at the Speed of Light implementation approach. James has acquired several small businesses and deployed the PAVE software and other TOC Experts to improve those businesses for him.



### An Introduction to the Demand Driven Adaptive Enterprise Model

*Presented by Carol Ptak*

**SUMMARY** Businesses are dying faster than ever as they fail to drive adaptation to an increasingly more complex and volatile set of circumstances. Management is starving for relevant information, much of which is obscured and distorted by antiquated models, methods, rules and tools held over from decades past. What will it take to change this? This workshop reveals a new management framework that enables a flow-based system of management to drive return on investment performance and adaptation for sustainability and improvement in the longer range. The new framework is called the Demand Driven Adaptive Enterprise (DDAE) Model. The Demand Driven Adaptive Enterprise (DDAE) Model spans the operational, tactical and strategic ranges of an organization allowing it to continuously and successfully adapt to the complex and volatile supply chains we see today. It combines the fundamental principles of flow management with the emerging new science of complex adaptive systems (CAS). It is the way that successful businesses will work in the 21st Century. This half day workshop will prove a compelling

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## Supply Chain

need for change, demonstrate fundamental solution principles and reveal a blueprint to transform the entire enterprise. Businesses are dying faster than ever as they fail to drive adaptation to an increasingly more complex and volatile set of circumstances. Management is starving for relevant information, much of which is obscured and distorted by antiquated models, methods, rules and tools held over from decades past. What will it take to change this? This workshop reveals a new management framework that enables a flow-based system of management to drive return on investment performance and adaptation for sustainability and improvement in the longer range. The new framework is called the Demand Driven Adaptive Enterprise (DDAE) Model. The Demand Driven Adaptive Enterprise (DDAE) Model spans the operational, tactical and strategic ranges of an organization allowing it to continuously and successfully adapt to the complex and volatile supply chains we see today. It combines the fundamental principles of flow management with the emerging new science of complex adaptive systems (CAS). It is the way that successful businesses will work in the 21st Century. This half day workshop will prove a compelling need for change, demonstrate fundamental solution principles and reveal a blueprint to transform the entire enterprise.

**SPEAKER BIO** Carol Ptak is currently a partner with the Demand Driven Institute ([www.demanddriveninstitute.com](http://www.demanddriveninstitute.com)) and was most recently at Pacific Lutheran University as Visiting Professor and Distinguished Executive in Residence. Previously, she was vice president and global industry executive for manufacturing and distribution industries at PeopleSoft where she developed the concept of demand driven manufacturing (DDM). Ms. Ptak spent four years at IBM Corporation culminating in the position of global SMB segment executive. A leading authority in the use of ERP and Supply Chain tools to drive improved bottom line performance, Ms. Ptak's expertise is well grounded in four decades of practical experience as a successful practitioner, consultant and educator in manufacturing operations. Her pragmatic approach to complex issues and dynamic presentation style has her in high demand worldwide on the subject of how to leverage these tools and achieve sustainable success.



### No Shortages Even in Volatile Demand Scenarios

*Presented by Dr. Rakesh Sinha*

**SUMMARY** Dynamic Buffer Management (DBM) was developed by Dr. Goldratt to ensure that product availability is protected against market demand fluctuations. Buffer size, trigger for buffer revision, frequency of buffer revision, and quantum of buffer change are the four important parameters which determine the effectiveness of DBM. DBM practices were developed when access to market demand data was limited, computing power was moderate, and application of AI/ML was still in its infancy. Now that we have access to faster, more frequent, and granular level demand data, computing power is higher, and AI/ML can be used effectively for short-term demand prediction, it is time to revisit our current practices of setting and revising the above four parameters to make DBM even more effective. Buffers are expected to be set at 'maximum demand during average replenishment lead time (RLT), adjusted for supply reliability'. Initial buffers are set using this formula and changes are made based on whether the actual inventory stays in the 'Red' or 'Green' zone for a specific time. If that happens, buffer is resized, either up or down, by a certain percentage point, which is 33% in most implementations. Such periodic quantum changes often

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## Supply Chain

cause stress on the supply side, which takes time to adjust to the new reality. In a retail scenario, for example, where demand is predictably low on weekdays and high on weekends, we end up setting buffers at the higher level throughout the week. We experimented with sticking to the definition of buffer size as 'maximum demand during average RLT, adjusted for supply reliability'. We used AI/ML based algorithms to predict short-term (RLT) demand at the most granular level where buffers are kept. These predictions were used to reset the buffer size and refreshed daily. This resulted in smaller and more frequent buffer changes, with smoother supplies. The results have been encouraging, with a substantial improvement in availability and reduction in overall inventory.

**SPEAKER BIO** Dr. Sinha is the founder and CEO of Reflexive Supply Chain Solutions, a specialized consulting firm in the area of Operations and Supply Chain. He has worked with Godrej Consumer Products as the head of Manufacturing, Supply Chain and IT. He led the TOC implementation in GCPL in 2004, which was the first Viable Vision implementation in the world. Under his leadership, GCPL was awarded the Platinum Award by TOCICO in 2015. Dr. Sinha has led several TOC implementations across India, Indonesia, Africa, Latin America and USA.



### What to Invest in Technology or Benefits? – How an ATV Master Distributor Reimagined its Supply Chain

*Presented by Jack Warchalowski & Duncan Patrick*



**SUMMARY** Isolation requirements of the pandemic environment created a unique opportunity to enjoy outdoor activities and generated an additional need for supporting equipment. One of the North American based All-Terrain Vehicle (ATV) equipment master distributors was faced with an unprecedented business challenge of exceptional demand for their products. Trying to support booming market demand and grow their dealer base at the same time, turned out to be next to impossible without a significant investment in the Supply Chain Management software. In addition to a sizable money requirement for the software, finding the right IT skillset and long implementation timeframe created seemingly unsurmountable obstacles. In 2022, the corporation was introduced to the DDR Material Data Feed, a Supply Chain Management Outsourcing Service, supported by the TOC-based RoadRunner software and provided by CMS Montera. DDR Data Feed enables organizations to increase revenue, reduce costs, minimize shortages and working capital requirements by providing Supply Chain Management services and cloud-based software – all set up within a couple of months. There is no need for an upfront IT investment, no challenging training sessions, no need for additional IT infrastructure or personnel. If this sounds intriguing, please attend our session describing how this ATV / UTV Master Distributor set the stage for its future growth by combining our DDR Data Feed Service with an Un-Refusable Offer to its North American dealerships base.

**SPEAKER BIOS** Jack Warchalowski is the CEO of CMS Montera Inc. CMS Montera specializes in software and consulting that helps clients solve problems in Operations and the Supply Chain. Jack helps organizations enhance their profitability and competitive position through the implementation of strategic improvement initiatives driven by CMS RoadRunner software. Jack is a Certified Management Consultant and a Professional Engineer registered in Ontario. He holds an MBA degree from the Wilfrid Laurier University and a Bachelor of Applied Science in Mechanical



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## Supply Chain

Engineering from the University of Waterloo in Waterloo, Ontario. In addition, Jack is certified by the TOCICO in all aspects of TOC.

Duncan Patrick is Executive Vice President of CMS Montera Inc. CMS Montera specializes in software and consulting that helps clients solve problems in Operations and the Supply Chain. Duncan's business consulting career is focused on working with clients to assist them solve problems in operations and the supply chain related to lead times, the forecast, inventory, capacity, on time delivery, product development speed and market focus. Duncan holds an MBA degree from the Richard Ivey School of Business, Western University and a Bachelor of Commerce degree from The University of Calgary. Duncan is certified by the Theory of Constraints International Certification Organization in all aspects of TOC. In addition, Duncan is a Certified Management Consultant.



### The TOC Solution to Warehousing

*Presented by Andy Watt*

**SUMMARY** This presentation will show how the Warehouse Strategy and Tactics Tree has led to some fantastic results... with clients smashing their initial targets. Typically, clients can find enough space in the warehouse and capacity in the people to deliver over 20% more sales without adding any additional people or space, by building robust processes and systems to: • Increase OTIF (push out cut-off time) • Increase and manage the resource capacity • Increase the warehouse space • Increase the productivity • Indicate early decisions • Focus improvements. Using case studies, this presentation will show you how clients have implemented with great results. It is well known that Constraint Obsessions is key to getting more out of the business, so by identifying the constraint and implementing Constraint Obsession and Specialization in the warehouse, the clients can ensure they are working in the right sequence, are never starved of work, and adopt a focus and finish approach.

**SPEAKER BIO** Andy Watt is a founding member of TOCICO and a Chartered Fellow of CILT. He is the owner and driving force behind Goldratt UK, increasing the exposure of TOC in the UK. He was the TOCICO Implementor of the Year in 2018. Andy was a Mechanical Engineer for ten years prior to starting his consulting career. Andy held several senior management positions within the Aerospace and Defense industry. He specialized in the implementation of TOC, Lean, Six Sigma and Taguchi in production and R&D environments. This included Hunting Engineering, AWE Aldermaston and Lockheed Martin. In 2000 Andy joined AGI UK, training coaching and consulting to companies. With the help of Martin Powell and Oded Cohen he formed his own company Levee LLP in 2004 and took over Goldratt UK in 2007 to provide TOC consultancy across the UK. Since 2004 it has grown to more than 20 employees. Over the last fifteen years Andy and Goldratt UK have implemented TOC in hundreds of organizations including: Bentley, Honeywell, Bombardier, Eurostar, Siemens and many more SMEs. Andy is also a Director of Tenon Engineering and RopeWeaver – a TOC based software company.

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## Technology



### **The New 7 Questions for Technology (7QT): And the Search for Hidden TOC Treasure**

*Presented by Richard Zultner*

**SUMMARY** There is a hidden treasure in Eli Goldratt’s 2000 business novel, Necessary but Not Sufficient — the 6 Questions for New Technology (6QNT). This process for “what to do with a new technology” has been under-appreciated, and under-used, for two decades... And to rediscover, and understand the power of these Questions, we will draw on two additional treasures: A second treasure is the Change Matrix (CM) — with a Pot of Gold, 2 Crutches, an Alligator, and a Mermaid. Also known as the Plus-Plus Buy-In Process. But this process story is not just about buy-in... it is about any Change, and any Solution proposed for a Customer or Client. This matrix gives us a framework, which we can extend, for greater insight, and additional power. A third treasure is the 9 Layers of Resistance (9LR) — which elaborates on not just (1) What to change? (2) To what to change? And (3) How to cause the change? But also on (0) Why change? And (4) How to measure and sustain the change? This story gives us a sequence, to take effective action, to deploy a new technology smoothly. All three of these treasures, together, reveal the hidden power of the 6QNT — especially when expanded into the enhanced New 7 Questions for Technology (N7QT). This extension of Goldratt’s original Questions give us greater guidance on how to best introduce any “technology” that is “new” to our Customers or Clients — including the technology of a TOC Solution. And this extension sits firmly on the shoulders of Eli Goldratt, and Eli Schragenheim...

**SPEAKER BIO** Richard E. Zultner is a Jonah, TOCICO Certified Implementer in Critical Chain Project Management, and PMI Project Management Professional. He works with frustrated project managers facing impossible challenges teaching them how to consistently finish their projects early (in 15-25% less time). By shifting their project management paradigm... to CC PM. 2. Certified Quality Engineer (CQE) and Certified Software Quality Engineer (CSQE) [ASQ], Six Sigma Master Black Belt, and QFD Red Belt [QFD Institute] 3. Retired Adjunct Professor of Critical Chain Project Management, at the Howe Graduate School of Technology Management, Stevens Institute of Technology, Hoboken NJ. USA.

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## **Standing on the Shoulders of Giants**



### **Innovative Education for a World with Sustainable Future**

*Presented by Daniela Avancini & Miguel Abuhab*

**SUMMARY** Building on Eli Goldratt's thinking and communication tools and the TOC for Education (TOCFE) body of knowledge, materials and implementations developed over the last 27 years, this non-profit organization is integrating these materials and methodologies into a transformational learning package that not only perfectly meets the new mandates of Brazil's Ministry of Education but will also be sustainable and made available worldwide. While the outcomes are expected to result in a higher graduation level, the impact will be students prepared for life who can transfer what they have learned to solve real-life problems using a win-win mindset on a path to create a future with no shortages of possibilities. Join this informative and inspiring Standing on the Shoulders of Giants presentation.

**SPEAKER BIOS** Daniela Avancini is a manager at the Miguel Abuhab Institute. She has a master's degree in Applied Linguistics from Cambridge University and a major degree in languages from Uninter International Center and has worked as an ESL teacher and teacher trainer for twenty-one years. Daniela is an education enthusiast who is always looking for challenges in this field, bringing great experience in the art of teaching children, young apprentices, and adults. Daniela defends and practices socio-emotional educational approaches and truly believe in meaningful learning. In addition to her 21-year experience as an educator and educational coordinator, Daniela has experience as an audiovisual producer and management within the sphere of the third sector with nonprofit organizations.

Miguel Abuhab is a mechanical engineer, graduated from ITA - Aeronautics Institute of Technology. In 1999, he founded NeoGrid, a provider of Supply Chain Management (SCM) software solutions, which has become a leading provider in Brazil, listed on stock market in December 2020. Currently holds the position of Chairman of the Board. Since 2003, Abuhab has worked on its Tax Simplification Plan for Brazil - Abuhab Model of VAT Collection - which served as the basis for the Tax Reform Report approved in December. In 2019, he presented his Plan to the CCJ - Constitution, and Justice Commission, which amends the National Tax System. About the subject, he wrote books which addresses tax reform to unlock Brazil and sustain growth and social inclusion. Abuhab incorporates in his business expertise the Theory of Constraints (TOC), developed by Eliyahu Goldratt, and ideas related to the supply chain. He also works strongly in social responsibility projects, focused on education. The TOCFE (TOC for Education) program, sponsored by the Miguel Abuhab Institute (IMA), has trained 200 volunteer teachers in 20 public schools in Joinville, serving more than 5,000 children.

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## Standing on the Shoulders of Giants



### The Measurement Nightmare Solved with Throughput Economics Approach

*Presented by Alejandro Fernandez*

**SUMMARY** This presentation shows how to evaluate the impact of critical management decisions based on an integrated view of S&OP processes that behave within reasonable optimistic and conservative measurements of T, I and OE. The approach proposed by Throughput Economics will help you to understand that in order to manage successfully in a VUCA world you need to allow the S&OP team to build and communicate a common sense description of the current situation and the future impact of the critical management decisions, based on optimistic and conservative and ranges of Delta Throughput, Investment, Operational Expenses, applied to the real current capacity profiles of critical constrained resources – CCR. Validate the need to preserve the protective capacity to ensure the delivery of the orders/projects, especially in the CCR. Evaluate the current portfolio ensuring that to maintain profitable sustainability, some SKUs should be cancelled, as a mean to obtain additional capacity.

**SPEAKER BIO** Alejandro Fernández was born in Bogota, Colombia and has a Political Scientist, MBA and MDU of Andes University, Bogota, Colombia. Alejandro is a Master Jonah, Licensee in Operations the TOC Way, Thinking Processes and Project CCPM from the Avraham Y. Goldratt Institute and Expert Holistic Certification by TOCICO. In 2000 Alejandro was appointed as the Regional Director of Goldratt Schools for Latin America, and has made TOC consultant training programs, as well as open educational programs with the University collaborations in Colombia: Externado, Uninorte, Javeriana, Bosque. Upon Eli Goldratt's request he has proudly translated TOC books and published books by Piensalo Editions. Since 1993 he has been a business educator in TOC through Piensalo Colombia, and has worked with more than 100 companies on implementing TOC solutions for Operations, Finance and Measurements, Projects, Supply Chain, Marketing & Sales Management, under the Strategy and Tactics approach of Harmony & Exepron & Focuss software, based on applying the TOC Thinking Processes to build and communicate common sense and generate consensus throughout the management team.



### TOC at The Speed of Light

*Presented by Ian Larsen*



**SUMMARY** TOC at The Speed of Light enables teams to analyse their current reality and build a transition to a future reality in a single day. It demonstrates the power of the new BOK Druid tool. TOC at The Speed of Light optimises the constraint of TOC expertise to rapidly analyse the current reality of a known industry environment and design a transition to a better future reality. Based on the premise that most industries share a common set of conflicts and undesirable effects driven by their individual policies and measures, it uses pre-configured Druids to enable teams to rapidly understand how their current reality is caused by their own decisions and how easily they

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## Standing on the Shoulders of Giants

can pivot to a new paradigm. In this presentation you will learn the process and see how WiseTech Global has used it to transform many of its acquisitions into highly productive operations.

**SPEAKER BIO** Ian Larsen is the Head of Delivery and Productivity for WiseTech Global. Ian has over 35 years of experience building, selling and implementing software in manufacturing, supply chain, utilities and mining industries coupled with extensive Theory of Constraints experience. Ian holds a Bachelor of Management Studies, Majoring in Computer Science, from the University of Waikato (New Zealand).



### Difference Between KAIZEN and Improvement to Realize "On Going"

*Presented by Satoru Murakami*

**SUMMARY** Dr. Goldratt has incorporated the concept of POOGI into the TOC's body of knowledge. Behind this is the Toyota Production System developed by Taiichi Ohno, who is loved by Dr. Goldratt. In the Toyota Production System (lean production system), "just-in-time" and "autonomation" are defined as the two pillars. The foundation that supports these two pillars is the philosophy of "three realism" and "continuous improvement (KAIZEN)". Satoru Murakami has been providing consulting services using the TOC method in Japan for 20 years, has taught more than 100 "KAIZEN activities" and had achieved remarkable results such as "Hitachi Tool" introduced in Dr. Goldratt's article "Standing on the shoulders of giants". Satoru will try to introduce about "Japanese styled KAIZEN" and difference between other "improvements". Actually, it is not well known that the meaning of "Improvement" and "KAIZEN" is very different. Improvement means to improve the "current situation" and "make it better". So, in actual improvement activities, there are two types that emphasize, improvement that emphasizes making changes and producing "Results" and "correctly recognizing the current situation "Process". How is "KAIZEN in TOYOTA" rooted in Japanese culture different from "improvement"? Taiichi Ohno taught his subordinates: "If you don't know the true cause, go to the site and see until you find out." This is the essence of the "three realism" of "going to the site," "seeing the real thing," and "thinking in reality." However, in order for this "three realism" to work, there are extremely human-like points about how to evaluate people and what kind of relationships should be built between subordinates and bosses. In other words, it is necessary to turn that human beings are evaluated by results, to "process" including their approach. However, the expression "evaluate" not may be inappropriate and the expression "work together" will may be appropriate. This shift from "result evaluation" to "process evaluation" also supports that takes a long time to work on, and "Japanese-styled KAIZEN activities". This presentation is based on 3rd step of 6 steps SOSOG, 'Get on the giant's shoulders. - Gain the historic perspective - understand the giant's solution better than he did'.

**SPEAKER BIO** Satoru Murakami was responsible for cost accounting in a major manufacturing industry. After that, he was the chief consultant of the TOC department at the Japan Management Association. He established Goal System Consulting Co., Ltd. in 2002 and became CEO. International Production Research Journal The paper "Application of TOC in Japanese Industry-The Case of Hitachi Tools (2006)-" was quoted directly in his paper is Dr. Goldratt's last paper "Standing on the shoulders of giants (2008)". Chairman of Japan TOC Advancing Committee (2005-2016) Lecturer, Faculty of Engineering, Hosei University (2003-2013) 2009 TOCICO Regional Award.

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## Standing on the Shoulders of Giants



### Strengthening Democracy with Constraints Management

*Presented by Alfredo Mycue*

**SUMMARY** By standing on the shoulders of giants in public administration, business management, and the Theory of Constraints, this presentation centers upon the importance of governments' ability to meet the needs of society by consistently producing quality public value. TOC has the ability to align goals, strategy, focus, behavior, and processes in the public sector, but many of the giants who developed these innovative concepts have never met the giants of public management; this presentation aims to change that and point the way forward for government.

**SPEAKER BIO** Alfredo Mycue is the Co-Founder of ReEngine Consulting, LLC. His firm enables educational institutions and public sector organizations to attain operational excellence through continuous improvement. Alfredo is a retired Army Lieutenant Colonel and Airborne Ranger. Alfredo is a graduate of West Point, the Command and General Staff College, holds a Master in Diplomatic History from Tulane University, and has a master's in public Affairs from the LBJ School of Public Affairs at the University of Texas, where he now teaches a Government Quality and Improvement course at the Governor's Center for Management Development. He is a Ph.D. candidate at the Trachtenberg School of Public Policy and Public Administration at George Washington University. He has the Project Management Professional (PMP) credential, is certified as a Theory of Constraint's Jonah, and is a Master Six Sigma Black-Belt (MSSBB) in efficiency and quality.



### Developing Superhero People Who Have Winning Mindsets, Long-Term Commitment and Always do Their Best Work

*Presented by Jarrod Saxton*

**SUMMARY** Advice and methods in the self-help and self-improvement industry are often vague or highly emotional and leave audiences with no lasting impact. Being involved in the self-help space, this gap became obvious to Jarrod when he discovered the Theory of Constraints (TOC). Jarrod sought to cross pollinate TOC principles into the self-help industry, to offer more reliable, long-term solutions for people looking to improve their lives. Drawing inspiration from the thinking process tools, Jarrod built 3 tools to meet the most common needs in the self-help space. Firstly, a life purpose and goal setting tool. One of the biggest problems with choosing a life direction or committing to long term goals, is that we change as people over time, and so our desires can change before we ever complete our more ambitious long-term goals. Goals that inspire us now, may not inspire us in 5 years' time. Drawing principles from TOC and supply chain management demand forecasting, Jarrod built the Life Direction



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## Standing on the Shoulders of Giants

Analysis, which allows people to predict what goals they will continue to be interested in and motivated by long-term. Secondly, finding your greatest strength. Most methods for discovering strengths involve high level quizzes and personality tests but leave people with no clear direction on how to apply that strength in their work. Using the thinking process tool principles of logic structures, and combining them with principles in business process documentation, Jarrod created the Aptitude Analysis, which allows people to break down their greatest achievements and identify an underlying method they have been unconsciously using during those moments, so that method can be fully harnessed in their work. Lastly, developing a winner's mindset to become more confident and have a positive outlook in life. There is a lot of information about improving your mindset in the self-help space, which is often given in the form of a long-winded book or presentation, and leaves people feeling like they need to practice for years to see a change. Jarrod consolidated this information into one simple logic structure with 9 key components. This is the Mindset Feedback Loop, giving people the ability to make quick shifts in their mindset in times of trouble or when making bold moves. Principles in TOC have been the foundation of these three tools and helped to bring a more practical and lasting approach to improving your life in the self-help space. This presentation uses the principles of TOC which will allow you to discover your greatest strength, improve your mindset, and set long-term goals you can commit to for 20+ years.

**SPEAKER BIO** Jarrod Saxton is a life purpose coach and an instructor of the TOC thinking process tools with the Black Belt in Thinking program. Jarrod has both applied, and guided others with the tools in a range of different areas, including teaching, software, relationships, strategy and sales — from business start-ups right through to billion-dollar companies.



### Buffer Management in Context: Managing and Reducing Instability

*Presented by Roy Stratton*

**SUMMARY** Eli (Goldratt, 2009) distilled out the 4 concepts (principles) of flow by considering how the seminal innovations in manufacturing flow management were developed to embrace increasingly unstable environments. The absence of reference to 'constraints' highlights the more abstract nature of these principles that encompass lean and TOC thinking. The focus on flow and limiting over production with continuous improvement are largely self-evident, but alongside this he exposes the need for a paradigm shift in thinking often missing in such applications (principle 3: abolish local efficiency). This presentation seeks to illustrate and extend these findings acknowledging the importance of system-based management signaling tools and the management of aggregated buffers in increasingly unstable environments. The presentation also explores how the choice of mechanism combines the need to both manage and reduce variability and uncertainty. In more stable environments the emphasis is on reducing variation and uncertainty across the delivery system, but higher instability brings with it the opportunity to gain immediate benefits which is where TOC exploits the opportunity to focus and use aggregated buffers to first align and then reduce the impact of variability and uncertainty. The presentation considers how this understanding can be used to interpret and extend mechanisms such as Statistical Process Control, Kanban, Vendor Managed

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## Standing on the Shoulders of Giants

Inventory, the Last Planner System and Buffer Management in a health and social care setting. Finally, the presentation identifies the growing need to hybridize and adjust the choice of mechanism where the nature and level of instability changes over time. References Goldratt, (2009), Standing on the shoulders of Giants: Production concepts versus production applications The Hitachi Tool Engineering Example, Goldratt Consulting.

**SPEAKER BIO** Roy Stratton is an Associate Professor in Operations and Supply Chain Management at Nottingham Trent University, UK and having completed a Jonah-Jonah course has researched and implemented TOC related developments over 35 years. His research is largely case and action research based, focused on flow management in complex environments, covering supply chain, project and healthcare. Previously, Roy worked for Rolls Royce Aero Engines in an internal consultancy role. He has published widely in both professional and academic journals and is currently a TOC-ICO Board member.



### Not Your “Granddad” Jonah’s TP Tools

*Presented by Peter Thorby*

**SUMMARY** Everybody in the TOC community is wondering why there is not a bigger uptake of TOC by the industries worldwide. And here I am wondering why there isn’t a bigger uptake of TP use within the TOC community... There is nothing wrong with Granddad Jonah’s TP tools, but to have value something has to be useful, usable, and used. TP tools overcompensate when it comes to usefulness, but they decline in the usability department and fall off the cliff when it comes to being used. The obsession with being technically correct has alienated the tools too far into the world of academics and out of the sphere of practitioners.

**SPEAKER BIO** 1982: Peter qualifies as a chartered accountant during a time of rampant inflation and starts learning “inflation accounting”.

1997: Family business (furniture manufacturing factory) burnt to the ground. This resulted in a rebuild of processes and policies geared towards getting furniture to stores ASAP to assure customers the business was still able to deliver. I.e., small batches and fast flow. (Alas, we “fixed” that anomaly over time and the business went back to big batches and slower flow).

1999: Peter installed DBR/BM/Replenishment in his factory as a solution for “production runs smoothly”. Peter found that big batches and slower flow didn’t work. ViAGO was the consultancy firm.

After the new systems had been installed, Peter asked, “haven’t we been here before with smaller batches and faster flow and all the behaviors that go with that?”

2014: Peter and 5 colleagues bought ViAGO and went about installing Drum Buffer Rope, Buffer Management and Replenishment solutions around the world. They also built supporting content.

2020: The world changed forever. ViAGO was the traditional “face to face” consultancy firm, and there was no more “face to face” possible.

2021: ViAGO reinvented itself with a “remote” courseware series focused on just “getting people started...”

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## **Standing on the Shoulders of Giants**

2022: Inflation again... Just like miniskirts, they come, and they go...

PS: One wonders why we just don't have cash accounting and ban accrual accounting. One wonders why many times when there is a human intervention, we make it worse!

Wouldn't cash be the real truth? Imagine if we had a combo of cash reporting and TOC thinking, how much closer to the "truth" we would be...

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## Other – Project Management, Sales, Management Skills



### Leveraging Theory of Constraints to Improve Sales Performance

*Presented by Patrick Ciccarelli*

**SUMMARY** Get ready to explore the challenges in Sales and how TOC improved sales performance. The presentation focuses on firsthand experience and data analysis of sales for several companies in the IT sector. In 2017, the founder was looking at some dismal prospects. After investing in sales, the team wasn't able to bring in any new business and the companies' sales were and had been flat. That same year, after 2 years of operations issues, the decision was made to utilize Theory of constraints to resolve long standing problems in service operations. It was there that some systemic issues were revealed and so began the long march to improving business operations. But things would get worse before they got better as sales continued to struggle. It wasn't until a couple of years later that a real discussion was had on applying Theory of Constraints to the sales process. It wasn't an easy process to decipher, but the impact to service operations was clearly evident. It was through this evolution of sales that led to a new view of how to approach planning, forecasting, and executing our sales operation. It even launched an entirely new company focused on sales ops for IT firms. In this presentation, the presenter will share his story of what happened, what the data showed, and how the TOC method applied in sales created sustainability in his first business and launched a second business to help other IT companies.

**SPEAKER BIO** Patrick Ciccarelli has been active in the IT sector for more than 30 years as a founder, executive, and investor. Originally starting in the education and nonprofit space, Patrick went on to launch and lead Varsity Technologies, the leading IT provider to nonprofit organizations in the San Francisco Bay Area. He has been involved in several technology products and most recently launched the SaaS Sales startup, Plumly, a revenue optimization platform built for technology and managed service providers. Patrick has held advisory roles for Ingram Micro as well as board roles for nonprofit organizations in the Bay area. He continues to mentor future executives, volunteer in his community, and speak on the need for more social good and environmental action in business. Patrick is a successful author of four technology books published with Wiley and Sons on the topics of networking and IT systems. He has sold over 50,000 copies and his books have been translated in multiple languages. Patrick holds a master's degree in Instructional Systems Design. He is married with two children and has been fortunate to call San Francisco his home.



### Math vs Physics of Flow – What Makes TOC so Powerful, and Yet So Difficult to Embrace?

*Presented by Sanjeev Gupta*

**SUMMARY** What makes TOC so powerful, and yet so difficult to embrace? In this informative and conversational session, Sanjeev will explain how counterintuitive solutions power the success of TOC, and at the same time, make it

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## Other – Project Management, Sales, Management Skills

hard for some people to buy into. For example, TOC posits: \* Allowing for idle time increases overall throughput. \* Allowing more time for a sub-process reduces overall cycle time. \* Stopping work on projects makes them go faster. \* Moving inventories away from the point of sale makes supply chains more responsive. TOC often feels counter-intuitive to traditional managers, consultants, and enterprise software providers simply because they've been trained in a particular way. It's never easy to see the world in a new way. The pure "numbers approach" works, but only up to a certain point. As supply chains, logistics systems, projects, healthcare systems all get more constrained, things will start to hit a wall. At that point, you have to understand the physics of your FLOW before you can use numbers to manage and improve things. TOC looks at the underlying physics of flow—that's why it's so powerful. This is a Memorial Lecture in honor of the late Peter Britt Noonan.

**SPEAKER BIO** Sanjeev Gupta has founded two TOC based software companies, Thru-Put Technologies and Realization Technologies. Thru-Put was a category leader in advanced planning and scheduling for complex manufacturers, and Realization has delivered more than \$7 billion of value to its customers for helping them finish their projects faster. His latest venture is the Center for Flow Based Management.



### Community Regeneration: Shifting Society to a Future with No Shortages of Health and Wellbeing Services

*Presented by James Heimuli*

**SUMMARY** Get ready to hear about the experiences of a New Zealand non-government organization working in community social change. Vulnerable communities of South Auckland (SA) experience the poorest health and well-being outcomes of New Zealand (NZ). This community is made up of largely Māori and Pacific peoples. Services cannot keep up with the ever-increasing health and well-being demands of communities with high needs. Established in 2016 TCC was born out of the need to overturn the persistent and undesirable experiences and outcomes of SA communities. TCC uses the tools of TOC to identify solutions to overcome the stable conditions that cause the SA communities UDE's. However, the pre-requisite for solving the SA problems requires responsive sequential intersectoral community approaches. Although there has been some success over the past 6 years, there are many challenges applying the TOC to bring about social change. Challenges include; 1. Getting TCC into a position of influence; 2. Applying TOC to an open social systems environment; 3. Selling solutions to social problems; 4. The tendency of systems to maintain the status quo. Our success with TOC includes; 1. Injecting the cause-and-effect language into social settings and agencies; 2. Exposing the key peoples to TOC concepts and tools; 3. Selling a social wellbeing solution to workplaces.

**SPEAKER BIO** James Heimuli works as Cause-and-Effect Architect for a social change organization in South Auckland, New Zealand. He has completed the Blackbelt in Thinking course with Viago.

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## Other – Project Management, Sales, Management Skills



### How to Really do TOC Successfully: A Ten-Year Case Study

*Presented by Ray Immelman*

**SUMMARY** Despite Eli's fervent wish, TOC has never been able to establish large-scale acceptance in the business world as the impactful driver of long-term performance gain. The question is "what is the unknown and unresolved constraint?" What holds the floodgates of acceptance closed? Through decades of hands-on deployment of TOC, I came to understand that the constraint is hiding in plain sight. The fundamental assumptions about the way that people interact within companies is in conflict with the objective of TOC. This relegates TOC to being used as a functional toolset (DBR, CCPM, TA) versus a powerful, comprehensive core corporate capability. Through empiric experimentation we have validate the constraint. I will describe the results, how this led us to re-conceptualize the requirements for success and to develop a whole new deployment construct. The world has never been more ready and receptive of TOC if it addresses the true corporate constraint.

**SPEAKER BIO** Ray Immelman has been in management consulting and executive management positions. He started off as industrial engineer in manufacturing/shop-floor work, progressing to the current position of head of Akzeon Inc. – a management consultancy specializing in long-haul strategy consulting engagements with companies interested in sustainable growth. Ray is a CMC-accredited Management Consultant with ICMCI.



### Goal Alignment: Realizing the Potential of TOC

*Presented by Rob Newbold & Matt O'Brien*

**SUMMARY** TOC is a means of connecting local actions with a global goal. The premise behind TOC—the "theory"—is that if you have a goal, there are local actions you can take that will make a significant difference relative to the global goal. This is very empowering; it means each of us can make a difference. We have within us the power to build a future with no shortages.

Besides the basic theory, TOC provides many tools for creating bridges between local actions and global goals, including supply chain management, critical chain project management, and thinking processes.

But it's not enough. TOC is not common practice, despite over forty years and compelling training, logic, and case studies. People continue, overwhelmingly, to take actions that seem at best to serve local goals.

A major reason for this is that there is frequently a mismatch of goals among team members, including employees and consultants. And without a goal, there can be no constraints.

You can expose problems with goal alignment by asking yourself the following questions:

1. To what extent do we agree on the goal?
2. To what extent do we agree that the goal is important?



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## Other – Project Management, Sales, Management Skills

3. To what extent do we agree how we'll get there?

If you don't know the answers or you know them for YOU or ME but not for US, almost certainly there is a mismatch.

The presenters share important ways to align goals in order to make TOC implementations more effective and longer lasting and suggest areas for further research.

**SPEAKER BIOS** Rob Newbold, CEO and founder of ProChain Solutions, is one of the world's leading experts on Critical Chain project scheduling and management. He has over thirty-five years' experience developing process improvements in various fields. Rob is a frequent writer and speaker and holds degrees from Stanford University, SUNY Stony Brook, and Yale University. He is the author of the books *Islands of Stability* (ProChain Press, 2019), *The Project Manifesto* (ProChain Press, 2014), *The Billion Dollar Solution* (ProChain Press, 2008) and *Project Management in the Fast Lane* (St. Lucie Press, 1998) and was a contributing author to the TOC Handbook from McGraw-Hill. ProChain Solutions has been a leading provider of software, methodology, and implementation services for Critical Chain solutions since 1997.

Matt O'Brien is currently serving as the strategy leader, Chief Listening Officer and principal process engineer for Boeing's Digital Transformation Program. He started with the company as a Design Engineer on 787 Movable Trailing Edge structures and has had the privilege of serving across in every Business Unit, tackling challenges spanning the integration of engineering & operations; process design & control in non-recurring and recurring workstreams; new business strategy & execution; organizational design & optimization; developing & equipping leaders facing novel types and levels of uncertainty.



### More Projects in Less Time

*Presented by Uwe Techt*

**SUMMARY** Critical Chain Project Management has been used for decades to realize extraordinary performance gains in single and multi-project environments. Time and again, we find that the potential performance leaps are compromised by the fact that the necessary paradigm shifts are accepted and confirmed by principle, but then not actually implemented, or only partially implemented. For example: The need for WIP reduction is accepted. However, instead of freezing projects, only a (sometimes even clear) strategic prioritization of projects is made - assuming that the people in the company will then implement the higher-priority projects on their own accord in an accelerated manner and defer the lower-priority projects. The need to bundle collateral is accepted. Nevertheless, project managers feel compelled to fix (many) deadlines (for milestones and individual tasks) in order to keep their project under control and to be able to demand binding participation from resources and external partners. Other examples are too precise planning - more precise than the noise of the world - and too much interference in the self-organization of the people and organizations involved. Another impairing factor is the tendency to continue with implementation even when a previous transformation step has not yet been fully implemented and has not yet produced its expected effect. In our estimation, these unproductive approaches result from the established ways of thinking and acting in the company (and among the people) (especially the socialization to local optimization, not being allowed to make mistakes and the search for culprits) as well as the repeatedly observed tendency to make

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## Other – Project Management, Sales, Management Skills

compromises, which often seems easier than solving emerging dilemmas and conflicts at the root. In this presentation, we show how companies (and the consultants supporting them) can succeed in deriving full benefit from critical chain project management. We uncover common mistakes and show "simple" solutions to recurring challenges.

**SPEAKER BIO** Uwe (born 1964) wanted to become a musician, founded a music publishing company in his youth and thus discovered his interest in business. Since 1985 Uwe has been working as a consultant and change coach. During this time he got to know different management methods until he finally came across the Theory of Constraints. In 2008 he founded with 4 other TOC experts the VITEM GmbH & Co. KG. Since then he has coached many companies with outstanding performance leaps.



### **It's Not Complicated – Essentials: Successfully Schedule and Deliver a Portfolio of Complex Routings or Projects**

*Presented by John Thompson*



**SUMMARY** This presentation will address essential elements required at each stage in Planning, Scheduling, Executing, and Analyzing a Portfolio of Projects, no matter the simplicity or complexity of the scheduling environment. Scheduling need not be complicated. TOC has proven this in many environments. Sophistication does not mean additional value; it means more confusion and slow adoption. Simplicity is required to transfer knowledge and the wide adoption of any method. This presentation covers the basics of sharing sufficient knowledge necessary to stabilize a chaotic scheduling environment, shorten lead times, and deliver on-time. Standard Operating Procedures (SOPs) can easily create conflict across departments and functions without the basic knowledge widely adopted in both span and depth, as departmental self-interest and even self-preservation is prevalent. Technology, Metrics, and SOPs must be synchronized in real-time and dynamic as environments change. Without this framework, Management will be stressed turning around to 'fix' and pacify the resulting friction within the operations. Breaking the Planning, Scheduling, Execution, and POOGI into a repetitive process creates stability and the platform for significant growth.

**SPEAKER BIO** John L. Thompson is a co-Founder and COO of Exepron, the predictive, cloud-based scheduling and PPM software solution. U.S. Secretary of Commerce Wilbur Ross presented Exepron with the President's "E" Award for Exports on May 21, 2018, the highest recognition any U.S. entity can receive for making a significant contribution to the expansion of U.S. exports. John has over 25 years of experience in all of the Theory of Constraint applications, including Critical Chain Project Management, Strategy & Tactics, TOC Thinking Process, Marketing & Sales, Distribution, Production and Throughput Accounting. John was a Certified Associate of the late Dr. Eli Goldratt and is a founding member and past Chairman of the Theory of Constraints International Certification Organization Board, the global professional organization setting the standards, testing and certifying competency in the Theory of Constraints.

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## Other – Project Management, Sales, Management Skills



### Beyond Critical Chain

*Presented by Daniel Walsh*



**SUMMARY** So what is constraining CCPM from becoming the irrefutable preferred project management and Business solution? This presentation will boldly go BEYOND CRITICAL CHAIN. The positive impact of Dr. Goldratt's Critical Chain project management (CCPM) solution in every possible environment has been well documented. In fact, it is being used by companies that previously did not view their operations as project management. It introduced the concept of rigorous rules for planning and executing work content while recognizing and treating the required resources with equal importance as the work content. So that the schedule considered both work and the required resources. As innovative and powerful as CCPM was, focusing on planning and scheduling, it did not address the very important element of cost. Perhaps this omission along with the required rigor in planning, limited CCPM from a wider acceptance. Since then, the CCPM software solutions that were developed have addressed these limitations and have significantly contributed to a much wider acceptance of CCPM. Critical Chain (CCPM) software has evolved, providing a much fuller Business Solution. Leveraging Big Data Analytics, Artificial Intelligence Machine Learning; providing real time Intelligence, at the Project, Portfolio and now at the Enterprise level. Connectivity via the Cloud, interfacing with other software solutions and databases using API's (Application Programming Interfaces) is now available. So, what is constraining CCPM from becoming the irrefutable preferred project management and Business solution? Many theories exist, expert pontifications and overall bewilderment abound. So, perhaps we collectively must dig deeper to discover the cause. Identifying the cause should point us to the breakthrough course of action.

**SPEAKER BIO** Daniel Walsh is a sought-after lecturer, coach, strategic thinker and is a trusted advisor to many senior corporate executives, currently is a member of numerous corporate boards. In addition, he is co-founder of Exepron®, an advanced EPPM SaaS solution based on Critical Chain methodology. His current efforts are focusing on developing synchronous enterprise value chain solutions in multiple industry sectors. His research and development are centered on identifying the need to identify and leverage the strategic constraints of the enterprise, which is the key to increasing throughput. This culminated in the development of the Integrated Enterprise Scheduling®, (IES®) solution engine. Initial empirical results from deploying the IES® in a dozen large companies over a five-year period have been very promising. Many executives and thought leaders are convinced this may very well be the unified scheduling solution required for maximizing the profit of an enterprise-wide value chain. The IES approach was chronicled when he co-authored The TOC Handbook, the seminal Theory of Constraints reference textbook.

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## Other – Project Management, Sales, Management Skills



### How Large Corporates Can Implement Change Effectively

*Presented by Andy Watt, Simon White & Rene Nibbelke*

**SUMMARY** In 2014, BAE Systems Australia faced a challenge in its Lead-In Fighter program. Critical Chain was identified as a methodology that had some credence and believability. The implementation saw an increase from 40% to 100% in on-time delivery. The success of this pilot has led to a need to embed a BAE Systems – Systems-Based Way of Working to enhance our reputation for delivery. This presentation will talk through: • The BAE Systems – Systems-based Way of Working – how we have defined this, got agreement across the organization and are embedding it • The collaborative approach we have adopted to provide mentoring, tools and resources to effect the change • How we have developed a “Learn from the Masters” strategy • How we have created the internal capability • How we have used the Strategy and Tactics Tree to drive change • How we have achieved cross-functional alignment to achieve Operational Excellence • The results achieved, so far... • The challenges of sustaining the methodology.

**SPEAKER BIOS** Andy Watt is a founding member of TOCICO and a Chartered Fellow of CILT. He is the owner and driving force behind Goldratt UK, increasing the exposure of TOC in the UK. He was the TOCICO Implementor of the Year in 2018. Andy was a Mechanical Engineer for ten years prior to starting his consulting career. Andy held several senior management positions within the Aerospace and Defense industry. He specialized in the implementation of TOC, Lean, Six Sigma and Taguchi in production and R&D environments. This included Hunting Engineering, AWE Aldermaston and Lockheed Martin. In 2000 Andy joined AGI UK, training coaching and consulting to companies. With the help of Martin Powell and Oded Cohen he formed his own company Levee LLP in 2004 and took over Goldratt UK in 2007 to provide TOC consultancy across the UK. Since 2004 it has grown to more than 20 employees. Over the last fifteen years Andy and Goldratt UK have implemented TOC in hundreds of organizations including: Bentley, Honeywell, Bombardier, Eurostar, Siemens and many more SMEs. Andy is also a Director of Tenon Engineering and RopeWeaver – a TOC based software company.

Simon White started in BAE Systems Australia as a fighter jet mechanic on the F-18 Hornet, eventually becoming a Cost and Schedule Analyst. He was then a primary team member in the BAE Systems Hawk CCPM implementation, the story of which has been shared at previous TOCICO CCPM Conference. That journey has enabled Simon to become a board member for TOCICO – a privilege and responsibility he does not take lightly. In his current role as Manager of Project Control for BAE Systems Australia, he seeks to provide appropriate alternatives to traditional methodologies, ensuring what’s applied is fit for purpose and applied diligently. He has worked in support of the BAE Systems global initiative, acting as an SME, a sounding board for curious employees, and mentor for those prepared to do something different – on one condition: That they do it like they mean it...

René Nibbelke started his Engineering career in the field of Cockpit Design and flight simulator experimentation. Since joining BAE Systems in 1996, he has a 26-year career in Strategy, Transformation, Process Solutions, System Assurance, Governance, Project, Programme and Portfolio Management on some of the most complicated high-value projects within BAE System’s order book. His current role as Global Head of Business Change & Future Project

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## **Other – Project Management, Sales, Management Skills**

Management Capability has allowed him to demonstrate his considerable skill, experience and capability in 'How to Do Change Like You Mean it'.

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## Manufacturing/Operations



### Comprehensive Management

*Presented by Humberto Baptista*

**SUMMARY** Organizations have no method for integrating the department and areas effectively in it. Usual attempts end up resorting to local optima and yielding limited results. Human organizations are complex systems. And this has good consequences: allowing us to create unprecedented value, but it has a steep cost: the difficulty of understanding the global effects of local actions. Any manager is aware of this and the higher levels (top management and board) struggle daily with the concerted activities of different areas and departments. Usual solutions all involve some type of local view and optimization. And these local-oriented methods fail to integrate effectively, fail to allow management to see the global consequences of their actions and fail to provide a common language to discuss and agree on the best course of action for the organization. Following the developments in Local2Global, Humberto presents the complete solution for taking management to the next level: managing with clarity on the global effects in a simple and practical way. Actions and decisions are comprehensive, allowing top management to really steer the organization and discuss and agree on the strategic direction with the board and relevant stakeholders. To embrace Comprehensive Management, six obstacles must be addressed. Surpassing these builds the foundations for Comprehensive Management: Comprehensive Decisions, Finance, Flow, Capacity, Protection and Value. The solution includes (but is not limited to) decisions, financial modeling, initiative valuation and selection, WIP management, CCR management, Risk management and value generation and delivery. This presentation will explore the mechanics of Comprehensive Management, the obstacles and how to surpass them and how to conduct the implementation in an existing organization.

**SPEAKER BIO** Humberto R. Baptista is a Synergist, Vectis Solutions CEO, a TOCICO Lifetime Achievement Award recipient (2019), served as strategic advisor to Neogrid, participated as a member of the TOCICO Board of Directors, Goldratt Group among others. Led Viable Vision projects on Consumer Goods, Retail, manufacturing, projects and services, taught TOC VV Application Experts and Project Leaders worldwide. Current interests: TOC Principles, Implementations by S&Ts, advanced TOC Finance, TOC Retail, TOC NPO (Government, Health and Education) and TOC4E.



### The TOC Core Processes – Clearing Confusions, Interdependencies and Effective Application

*Presented by Mickey Granot*

**SUMMARY** Understanding the essence of the focusing process and the POOGI is critical for effective application of TOC. The TOC core processes; the focusing process and the POOGI are critical yet there is a lot of confusion around them, lack of clarity about their interdependency and not rarely they are misused. Core concepts such as a

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## **Manufacturing/Operations**

constraint, a bottleneck and a CCR are interpreted in different ways thus affecting the whole focusing process. There are also many interpretations as to what is or can be the system's constraint and often times it is not clear how to use the POOGI together with the focusing process. Within each of these processes, there is room for interpretation but also for rigor, for clarity and for consistency. What are the frequent confusions? What should be used instead? What are common ways the processes are being misused? how do these processes work together? This presentation will deal with frequent confusions around these critical processes and try to provide better clarity.

**SPEAKER BIO** Mickey Granot has been a TOC practitioner for 30 years now. Mickey spent many years working as Eli Goldratt's right-hand-man in developing the TOC body of knowledge and disseminating it to consultants and customers globally, and eventually was the CEO of Goldratt Group. Since he left the Goldratt Group, Mickey dedicated his attention into continues development of the knowhow and its practical aspects helping customers globally achieve and sustain breakthrough performance in operations and business.



### **Creating Stable and Predictable Operations with a Demand Driven Operating Model**

*Presented by Christoph Lenhartz*

**SUMMARY** Today's volatile, uncertain, complex and ambiguous supply chain and operations environments require stabilizing, agile and resilient operating models. A Demand Driven Operating Model (DDOM) is a supply order generation, operational scheduling and execution model using actual demand in combination with strategic decoupling and control points and stock, time and capacity buffers in order to create such a stable, reliable and agile system in the operational relevant time horizon. A DDOM is designed around four basic elements: (1) It paces to actual demand. (2) Strategic decoupling points absorb variability. (3) Operational control points are used for scheduling, gating and resource and order synchronization as required. (4) Dynamic stock, time, and capacity buffers protect the decoupling and control points. The DDOM is designed specifically for today's environment. It provides clear operational priorities to ensure high customer service, controlled inventory levels and short lead times even under adverse conditions. Within the DDOM, Demand Driven Material Requirements Planning (DDMRP) generates replenishment orders (work orders, purchase orders or stock transfer orders) for the stock buffers at the strategic decoupling points on the basis of actual demand and the buffer configuration. Detailed resource scheduling is driven around and through the operational control points. Pace setting control point resources (drums) are scheduled finitely, using the order request dates generated by DDMRP. Demand Driven Execution (Buffer Management) actively manages stock, time, and capacity buffers in relation to all open and released orders and scheduled activity. Time buffers protect the control point schedules. Capacity buffers define non control point resources' ability to absorb execution variability or support additional flow. On a continuous basis, alerts are provided as signals to DDMRP and order progress to Demand Driven Scheduling to enable early and proactive intervention as necessary to protect the flow. Adaptation describes the closed-loop feedback and the analysis of past and projected future model performance, feeding into DDS&OP and resulting in a reconfiguration of the DDOM. The model configuration or "Master Settings" replace the conventional notion of the Master Production Schedule. The



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## Manufacturing/Operations

presentation explains the underlying concepts and how a DDOM operates by discussing its components and interactions and illustrates its functioning through the case of a machining component manufacturer.

**SPEAKER BIO** Christoph Lenhartz, MBA, Jonah, TOCICO-certified, Certified Consultant (bdvb), DDPP, DDLP, SCOR-P, CSCP, CSCA and TOCICO Board Member, Past TOCICO Chair. In over 20 years Christoph has acquired a wide-ranging, international experience in industry, as a successful entrepreneur and also a leader of management consulting teams in high complexity TOC implementations. He has led strategic, business transformation, supply chain management and IT projects and his expertise also includes post-merger integration of supply chain operations for major international groups. One of the leading experts in Europe in TOC and Demand Driven methodologies he is the General Manager of Catena Strategies, a TOC-based consultancy in management and operational excellence. He also serves as Master Instructor for the Demand Driven Institute. He has published articles on TOC and management topics in journals such as "Quality Progress" and has translated and written books on TOC and management topics in German. Christoph holds an MBA from Clemson University (USA), has graduated from the University Essen (Germany) as a Diplom-Kaufmann and has pursued post-graduate studies at Washington State University (USA).



### Quality Control is Often the Bottleneck in Operations

*Presented by Philip Marris*

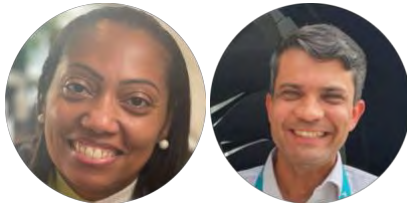
**SUMMARY** Quality Control is very often the bottleneck in operations today. This situation is not often identified. The ERP system does not see it. The silo effect between operations and quality contributes to the problem not being recognized. Top management is often just not interested in that activity. In our significant experience of all types of industries throughout the world we find that Quality Control (Q.C.) is the bottleneck in more than half of organizations. This is remarkable. One of the reasons that leads to Q.C. having too much work is the continual increase in the quantity and complexity of quality controls of products. This is true whatever the industry, whether it be aeronautics, software development, luxury goods manufacturing, or the food industry. Another contributing factor is that it is not so easy to manage the performance of Quality Control. How does one maintain the right balance between rigorous work and productivity? It is managerially difficult to accept some sort of time per part. For the same reason it is very difficult to define the proper capacity (the number of controllers) during the budgeting process. When estimating the workload management often falls into the trap of wishful thinking and estimates (hopes) that the quality will improve next year. And because it is not a value-added operation management tends to limit expenses in this domain. This situation has significant consequences in that vast majority of industries where quality is still problematic. Some companies such as Toyota Motor Manufacturing have, after decades of hard work, reached levels of right first-time quality of the order the 5 to 50 defective Parts Per Million (ppm) produced. But the majority of organizations are living with scrap rates over one hundred times worse...without good reason. We will argue that Good Theory Of Constraints, like Good Lean, includes outstanding levels of operational quality. We will discuss why having a bottleneck in the quality domain is a very bad situation. Why it is possibly the worst possible department in which to have a capacity constraint. We will present a number of solutions that can easily be applied to improve these sorts of bottlenecks and hence the Throughput of the company. We will present 8 recent examples

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## Manufacturing/Operations

from various industries: steel making, luxury watches, aeronautics, paint production, rocket manufacturing and the nuclear industry. We will conclude by saying that it happens often, that it is a very unhealthy situation, but that it is easy to fix and once fixed this will have extraordinary impact on the organization's performance in the short term and in the long term.

**SPEAKER BIO** Philip Marris started his Theory of Constraints journey 36 years ago when he was 26 years old. He started his career as a production engineer in the steel industry. Currently, he is the founder and CEO of Marris Consulting, a management consultancy based in Paris France that operates globally. He has assisted over 290 organizations throughout the world including: Embraer, McDonald's, Louis Vuitton, Ariane (rockets), Safran, Valeo, Procter & Gamble, Air France, Siemens, GSK, ArcelorMittal, SKF, Société Générale, the French Air and Space Force, Rolex, Veolia ... Nearly all of the firm's assignments are based on the Theory of Constraints. He has over 30 years of experience in industry and in consulting. He is English and is bilingual and bi-cultural. He lives in Paris, France.



### TOC for Global Optimization in Engineering Resource

*Presented by Priscila Oliveira & Webster Ramos Silva*

**SUMMARY** Embraer, being an aeronautical company, needs excellent engineering resources. In addition to technical knowledge, we also need to have the right people at the right time during developments, that is, optimized resources. Within Embraer engineering, we have a strategy area that monitors the workforce for the coming years. The data is generated by the product engineering departments of the Business Units (BU) – Commercial, Defense and Executive – and support engineering – Testing, Software, Technological Development and Chief Engineer – in the programs under development and serialization, as well as by the Engineering Department itself. strategy for new developments. One of Engineering's strategic projects, called "Inter BU", defined the objective of optimizing the use of Engineering resources, enabling alternatives to engage in new business opportunities or to meet the agreed deadline of critical commitments. Engineering resources are limited and must be properly distributed to leverage the company's overall results. Enable alternative engineering resources to address new business opportunities or meet critical commitments on time is critical and requires flexibility to ensure a high level of efficiency, and the five focusing steps of TOC has been an important methodology that helps us identify resource constraints both for the quantity and for the quality needed for the product portfolio. The Inter BU project mapped the process using this methodology a whole. We divided the project into 2 fronts: Front 1: Identify, simulate and optimize engineering resources to meet the OTD of resource-constrained projects. This front is based on the execution of activities through the CCPM. Front 2: Identify, Simulate, Optimize and Reallocate engineering resources to meet business demands in accordance with corporate strategy. Front addressed with a workshop where we use the Thinking Process to identify the root cause and guide the strategy.

**SPEAKER BIOS** Priscila Oliveira is the Senior Strategic Planner at Embraer S.A. She holds a bachelor's in Engineering, an MBA in Project & People Management, and is a Certified Jonah and Jonah's Jonah.

Webster Ramos Silva is an Integrated Product Development Manager at Embraer S.A. Bs. Mechanical Eng., Msc. Aeronautical Eng.

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### **Eight Uncomfortable Truths**

*Presented by Justin Roff-Marsh*

**SUMMARY** The entire customer interface for a typical industrial organization is outdated and dysfunctional. Justin will argue from first principles for a complete rethink of sales, engineering, and the design of the distribution model. Your senior management team won't like these truths. They won't necessarily argue that they are false, they just won't like the organization-wide implications of them. The good news is that your competitors' management teams will like them even less! The better news is that if you have the resolve to transform your organization around these 8 truths, you will quickly open up an unassailable lead on your competitors. 1. Your Operations group should be responsible for revenue. Sales should focus exclusively on growth. 2. You should be optimizing for speed—not proximity—to customer. 3. You need to fix your partnerships (yep, they're broken) to ensure clear demarcation lines between manufacturer and reseller. 4. You need to fix your engineering department (salespeople aren't engineers and production engineers aren't design engineers). 5. Your sales team should be selling programs, not products. 6. Your salespeople should be inside. Application engineers should be in the field. 7. Virtually all sales activity should be campaign (not account) based. 8. Salespeople should be paid salaries, not commissions (and performance should not be optional).

**SPEAKER BIO** Justin Roff-Marsh is the author of *The Machine: A Radical Approach to the Design of the Sales Function*. (Winner of Gold in the Sales category of the Axiom Business Book Awards.) He's the founder of Ballistix—a consultancy with operations in the USA and Australia, delivering engagements worldwide Justin's approach to the sales process is as revolutionary as Deming's was to manufacturing. He argues passionately that the application of scientific management principles to the sales process is the next great uncharted frontier for industry.



### **Learning from Failure and Various Giants. TOC & CCPM is Necessary but Not Sufficient for "Product & Service Development" Project**

*Presented by Kaoru Watanabe*

**SUMMARY** It is well known that difficulties to utilize CCPM for "Product & Service Development" projects and we experienced a lot of failures or poor results. Kaoru presents, based on his lessons learned from failure, misunderstanding and wrong assumptions causes such failure, and useful knowledge to overcome various obstacles. Most of "Product & Service Development" projects are "SOFT projects" that involve cooperation in learning exchanges, expert advice, economic and trade development, and information exchange. In Many cases, project process includes experiment process, iterative or incremental process. If Kaoru's understanding and observation is reasonable, the original CCPM is designed to support "HARD projects" and many of TOC practitioners do not have

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## **Manufacturing/Operations**

enough knowledge to utilize CCPM while accommodating the nature of “SOFT projects” In this presentation, Kaoru illustrates the nature of “SOFT project” and difficulties to utilize CCPM for “SOFT project”. He also shares his “Learning from Failure and various Giants” Since his clients do not permit to disclose the name of the client and detail of the projects, he will not provide actual case studies, but he will present “essential information based on the reality” extracted from 50+ projects, about 1) project outline 2) difficulties & failure 3) causes & reasons 4) practical knowledge to overcome obstacles, and 5) Success by combination of CCPM and other knowledge or methodologies. In this presentation Kaoru emphasizes that he learned all knowledge to overcome obstacle from existing knowledge about Project Management, Operations Research and TOC. He did not invent new knowledge nor methodology. Precise understanding of boundary and assumptions of TOC and open mind to learn from failure and outside of TOC led him to achieve meaningful result of CCPM in “SOFT projects” environment. He also emphasizes TOC and CCPM is practical and powerful in “SOFT projects” environment. Even in agile development such as “SCRUM” or “DevOps”, the concept of Constrains, Flow, and Buffer Management (including fever chart concept) are the essential and practical knowledge to realize “GOOD FLOW” of the projects. He concludes his presentation by his idea about key success factor “Learning from Failure and various Giants”.

**SPEAKER BIO** Kaoru Watanabe led Hitachi Limited’s TOC initiatives from 2010 through 2021. Hitachi received “The TOC Company of the Year Award” in 2018. Immediately after his retirement from Hitachi Limited, Kaoru started new TOC consultant career at the consulting organization lead by Mr. Satoru Murakami, Recipient of the Regional Achievement Awards 2019. His consultation service is not an implementation of TOC. He supports POOGI that realizes immediate and continuous results not only by TOC but also lessons learned from failure, various knowledge about Operations Research, Project Management, Marketing and Sales. Current his focus area is “Product & Service Development” and “Smart Manufacturing”. His clients include mid-range to very large-scale technology companies (Manufacturing and Information Services) in Japan.

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