



Meet PEX Network's Global Advisory Board

- ➔ ABOUT OUR 14 ADVISORS
- ➔ THEY REVEAL WHAT IS IN THEIR ESSENTIAL OPEX TOOLKIT
- ➔ THEY SHARE 8 BIG PREDICTIONS FOR OPERATIONAL EXCELLENCE IN 2025

Shaping the future of Process and Operational Excellence

The Global Process Excellence Network Advisory Board is a group of industry thought leaders with a proven track record of driving process excellence both strategically and tactically. The board reflects the diversity of the Process Excellence community with a range of expertise from different global industries. The board share insights and help to shape the global agenda of the Process Excellence Network www.PEXNetwork.com.

MEET PEX NETWORK'S GLOBAL ADVISORY BOARD



Dr. Oliver Braitmayer,
Vice President
Operational
Excellence
at **Siemens
Energy
Solutions**



Anu George,
Head of
Operational
Excellence at
Morningstar



Jon Theuerkauf,
Managing
Director and
Group Head of
Performance
Excellence at
BNY Mellon



Erika Toth,
Group Head of
Business and
Continuous
Improvement,
**Thomas Cook
Group**



Dan Morris,
Managing
Principal at
**Wendan
Consulting**



Kevin Wojcikewych,
Vice President,
Business
Optimization at
Chiltern



Yr Gunnarsdottir,
OE / CI Process
Leadership at
**Royal Dutch
Shell plc**



Debashis Sarkar,
Managing
Partner of
**Advisory &
Consulting**



Jeff Brown,
Head of
Worldwide
Operations,
CNA Insurance



Nigel Warren,
Managing
Director,
**On Tap
Marketing**



Marvin Raymundo,
Senior Vice
President for
Operational
Excellence
and Project
Management,
**Banc of
California**



John Biedry,
Senior Director
of Global Lean
Enterprise,
Nike



Dr. William A. Cohen,
Major General,
USAF, Ret.,
President and
Founder,
**The Institute
of Leader Arts**



Lisa Norcross,
Head of the
Center of
Operational
Excellence,
E.ON

ABOUT OUR ADVISORS



Marvin Raymundo

Marvin Raymundo is the Senior Vice President for Operational Excellence and Project Management at Banc of California. He is responsible for enterprise projects focused on driving improved customer satisfaction, cost savings, and increased revenue through process reengineering and technology.

Prior to joining Banc of California, he led Operational Excellence teams for Fortune 500 companies such as Pacific Life, Avery Dennison, and GE Capital. At GE Capital, Marvin was awarded a Lean Six Sigma Black Belt certification and was recognized with a Lean Six Sigma Leadership award.

Marvin received a bachelor's degree from the University of the Philippines, and graduated with honors while receiving a master's degree in Business Administration from DePaul University in Chicago. Marvin also earned certifications in Change Leadership from Cornell University, and Paralegal Studies from Loyola University.

"The PEX community is a tremendous source of best practices and networking, and I am committed to help grow this community by providing insights and ideas."



John Biedry

John is the Sr. Director of Global Lean Enterprise at Nike's headquarters in Beaverton, OR.

He is responsible for developing the corporation's worldwide lean deployment efforts. This includes training and development, metrics, strategy, recruiting, coaching, continuous improvement and tracking business benefits. His scope includes driving lean principles throughout the Nike business including external suppliers, customers and internal operations.

Prior to joining Nike, John held leadership positions in a number of companies including Waste Management, ServiceMaster, and Sears. In addition, he served as a consultant at Breakthrough Management Group, where he guided organizations in utilizing continuous improvement & innovation to improve business performance.

Mr. Biedry graduated from Long Island University with a Bachelor's degree in Environmental Science and a Master's degree in Public Administration and Environmental Planning.



Kevin Wojcikewych

Kevin Wojcikewych is Vice President, Business Optimization at Chiltern. Prior to this Kevin was the Senior Director & Global Head, Business Optimization for Novella Clinical, a Quintiles company. In this role, he had global responsibility for strategic business transformation and optimization. Kevin has also led operational excellence and continuous improvement deployments across several organizations, including Quintiles, Credit Suisse, LendingTree, and Citigroup.

Kevin has B.A in finance from Saint Louis University. He is a certified Lean Six Sigma Black Belt and Project Management Professional (PMP), patent holder, and has authored several articles, blogs, and white papers.

"I look forward to sharing, collaborating, and learning from other members of the PEX Network as we advance and drive process and business excellence across our organizations."



Yr Gunnarsdottir

Yr has 20 years experience of leading business strategy and process & performance management initiatives. She has been on the front line in developing Continuous Improvement and Operational Excellence approach within multiple Fortune 500 companies. Enabling them to enhance and align strategy, business planning and KPIs with the reality of daily operations and behavioral challenges in the spirit of Continuous Improvement and Operational performance.

Yr joined Shell International in August in The Netherlands in August 2012. In her role as OE/CI Process Leadership she is responsible for embedding Continuous Improvement approach at a global level within the various businesses and functions. One of her key responsibilities is to drive efficiency gains to maintain competitive advantage within the Upstream Exploration organization and the Subsurface Technical User Community.

"I look forward to being a member of the PEX Global Advisory Board, sharing and collaborating with likeminded professionals on the many challenges we face in understanding and deploying Operational Excellence."



Jeff Brown

As of September 2016 Jeff joined CNA Insurance as head of worldwide operations. Jeff has 34 years in Insurance, consisting of:

27 years Chubb & Son:

- ➔ 20 years Commercial P&C Underwriter/Underwriting Management.
- ➔ 7 years Head of US Field Operations. Consisting of 65 branches' policy administration and Underwriting Assistant support. Built 2 claims centers, 3 policy processing centers and 2 UW renewal centers.

7 years at XL (now XLCatlin):

- ➔ May of 2008 joined XL as Chief Processing Officer for North America.
- ➔ Created centralized Operations support of 11 underwriting businesses throughout US, Canada and Bermuda.
- ➔ Offshored 30% of work to captive entity in India.
- ➔ Built Operations to consist of end to end process/execution from Submission to Premium Collection, including Training, Regulatory, BPM, QC, Claims data integration, and Operational Analytics.
- ➔ May of 2015, XL acquired Catlin insurance:
- ➔ Accepted new role as SVP Enterprise Operations Leader for Americas Region.
- ➔ Role consists of all prior functions plus expansion of territory, now consisting of US, Canada, Bermuda, Latin America, India and Poland.

"The world relies on processes in order to function, and we are all customers who experience the benefits, and sometimes the negatives, of process. Whether that is in our personal lives or professional lives, whether that is insurance, retail/wholesale establishments, other financial services or manufacturing industries. The PEX network performs an important function, perhaps the key word being "network" because through the collaboration and networking opportunities PEX provides, all process and operations specialists in any capacity will benefit from association with the PEX network by continuously growing their skills/knowledge and applying that to whatever role they play."

ABOUT OUR ADVISORS



Nigel Warren

Nigel has a passion for business simplification and performance improvement, enabled by streamlined processes and communications. Since 2007 Nigel has been a frequent speaker at PEX conferences and active contributor to PEX Network. He has held Product Marketing leadership positions at three BPM software companies - Nimbus, TIBCO and MatsSoft. He now heads OnTap365.com, an independent marketing consultancy that focusses on the digital innovation and process improvement technology sectors.

“The PEX Network is a tremendous community of process improvement professionals and the consulting and technology vendors that serve them, or would like to serve them! I’ve worked for three such technology providers since 2007, and I’ve chaired the “Technology Stream” at PEX Week for the past two years.

From my perspective the community will thrive so long as the topics under discussion provide value to all. And that must take into account emerging technologies and new methodologies best suited to the digital challenges that our businesses are confronted with. I hope my input to PEX Network will further that aim.”



Erika Toth

Erika Toth began her working life in 1999 as an engineer, assisting travellers by redesigning and streamlining processes in ground operations and passenger handling for Malev Hungarian Airlines and later on for Wizzair.

Over 17 years Erika’s career path has made full circle, she now applies her extensive skills and experience in process excellence and continuous improvement to improving the customer experience of the 20 million people who travel with the UK-based Thomas Cook Group each year.

In addition to aviation and travel Erika has directed large scale improvement and change programmes in the telecommunication and pharmaceutical industries, worked for Vodafone, Telenor and GlaxoSmithKline.

Besides her Masters degrees in Transportation Engineering and Business Administration Erika is a certified change manager, Lean Six Sigma Master Black Belt and certified customer experience professional.

“My commitment to the PEX Network is to bring fresh challenge to the table around how the process excellence approaches can truly enable customer centricity and how we improve and modernise the perception against OPEX. I also want to help develop a new OPEX / PEX image that demonstrates full alignment with customer, and support innovative and agile change.”



Dr. Oliver Braitmayer

Dr. Oliver Braitmayer, currently Vice President Operational Excellence at Siemens Energy Solutions, has been with Siemens in various leading roles since the year 2000. He worked in different businesses for Siemens, mainly Mobile Phones, Solar Energy, Energy Solutions, Corporate Development and Corporate Audit. Prior to Siemens Dr. Braitmayer worked at a Top Management Consultancy for clients listed in the German DAX Index. His career at

Siemens has been enriched with a broad range of cultural experience, which he gained in the recent years by working in an international environment and living in countries such as the USA, Israel and Brazil. In addition to the cultural appreciation Dr. Braitmayer has developed a deeper interest in Brazilian art and music during his time abroad. In his leisure time he enjoys playing music, skiing, and enjoying exotic food and wine in the company of his friends.

“My commitment to the PEX network...”

- ➔ to inspire and inform the PEX members with practical advice on business improvement tools, methodologies and technologies in order to achieve their business goals.
- ➔ to provide advice about the editorial direction the portal might follow.
- ➔ to provide insights and feedback to regular contributors and help to build the community.”



Jon Theuerkauf

Jon Theuerkauf is an improvement and innovative visionary with over 30 years of experience creating and implementing winning strategies to transform organizations as well as those companies looking to “Future Proof”. Along his career path, he has held several executive roles in financial services. He has evolved into a global improvement/innovation leader who incorporates the holistic ideas of performance excellence...quality, innovation, productivity and efficiency into start-ups as well as existing organizations. He is becoming a leader in the use of smart, rapidly deployable technologies combined with traditional reengineering tools and approaches.

Highly skilled at leading individuals, teams, and organizations, he has an uncanny ability to optimize the way a company operates to help them compete globally, grow revenues, increase shareholder value and leverage the engagement of their employees. Jon’s record of accomplishments includes more than 7000 successful projects resulting in more than 10,000 improvements and innovations implemented, yielding more than \$5B in certified bottom line financial benefits and growing.

Having lived and worked abroad for more nearly 15 years, he most recently was working in New Zealand prior to coming back home to the US to work with BNY Mellon as Head of Performance Excellence.

Jon’s additional executive leadership roles including serving as:

- ➔ Senior VP, Head of WorkSmart at ASB bank in New Zealand
- ➔ Advisor to the President and CEO of Sberbank of Russia in Moscow
- ➔ Managing Director, Global Head of Operational Excellence, Cost Management and Offshoring and Outsourcing at Credit Suisse in Zurich, London, and New York;
- ➔ Managing Director; Head of Best Practice—Global Transaction Banking at HSBC in London and New York;
- ➔ Managing Director and Six Sigma Quality Leader at GE Capital Structured Finance Group in Connecticut;
- ➔ Senior Manager of International Customer and Technical Services at MCI Telecommunications in New Jersey, Georgia, and Illinois;
- ➔ Director of Professional Services for Career Management Group in Chicago, Illinois.

ABOUT OUR ADVISORS



Anu George

Anu George is the Head – Morningstar Excellence at Morningstar, Inc., a leading provider of independent investment research. Her responsibilities include providing a strategic direction to the continuous improvement, quality & excellence initiatives at Morningstar. She has successfully led the LEAN transformation at Morningstar & is now focused on institutionalizing an Agile culture in her organization. Anu has more than 20 years of experience in reputable organizations such as Unilever, GE, and Morningstar. She has global experience through her extensive work in Asia, North America, and Europe. Her strengths lie in operations management and LEAN Six Sigma. She is a frequent speaker on topics such as business process excellence and leadership.

Anu holds a bachelor's degree in economics and accounting from the University of Mumbai, India, and a master's degree in business administration with a specialization in marketing from the University of Mumbai.

"PEX network is a great way to meet extremely knowledgeable professionals. My goal is to help generate thought provoking topics for discussion, learning and experimentation, and to help the overall operational excellence community with these ideas."



William Cohen, Ph.D.

Bill Cohen was the first graduate of the PhD program that Peter Drucker co-developed at what is now the Masatoshi Ito and Peter F. Drucker Graduate School of Management. Graduating and becoming Drucker's friend, he applied Drucker's methods and rose to become an Air Force general and the author of more than 50 management books published in 23 languages. He is the President of the Institute of Leader Arts which offers a unique corporate training program based on Drucker's methods. Cohen's latest book is Peter Drucker on Consulting: How to Apply Drucker's Principles for Business Success. He can be reached at wcohen@stuffofheroes.com.

"I am committed to the PEX Network because it enables a common effort for ensuring that organizations focus on developing and implementing processes for continued excellence in achieving the very best, regardless of the situation of mission, resources, product, and customers."



Dan Morris

Dan is the coauthor of five books on business process transformation, a columnist for PEX, and the author of numerous white papers on a variety of Business Transformation and Digital Transformation topics. He has spoken internationally at over 40 conferences and he serves on the International Board of Directors for the Association of Business Process Management Professionals (ABPMP). Dan is the author of the ADDI BPM methodology and is a leader in melding Business Architecture, Process Architecture, and Enterprise Architecture into a single integrated approach to business transformation.

Dan is also the co-author of the ABPMP International BPM Practitioner's certification tests and the Business Architect Association certification test. He also hosts a monthly webinar series for ABPMP and he has led formal training sessions for several different organizations.

Dan is a Managing Principal at Wendan Consulting. He has also served as North American Practice Director for Business Transformation at three leading international consulting firms, and as an Executive Consultant with IBM Global Services. Through these positions, he has worked in multiple industries and has been responsible for the successful delivery of numerous BPM based business transformations and the creation of multiple BPM Centers of Excellence.

Dan's new book, *The Business Transformation Field Guide: Hints for Delivering Successful Solutions* will be released on Amazon in September 2016.

"I have been a columnist with PEX for five years and have spoken at PEX conferences and hosted workshops. I am looking forward to taking this next step in my relationship with PEX and I am proud to serve on the Global Advisory Board."



Debashis Sarkar

Debashis Sarkar is an internationally recognized name for customer-centricity and lean management. He is counted among world's leading lights on lean management and credited with pioneering work tools, techniques and approaches. His thoughts and ideas can be found in his 8 books and more than 70 papers authored by him.

He is currently the managing partner of boutique consulting firm Proliferator Advisory & Consulting (www.proliferator.net) that helps companies with their agenda of customer-centricity and lean enterprise.

He is a Fellow of American Society and Quality and recipient of Phil Crosby Medal in 2014.

To know more about him, you can visit the following website: www.debashissarkar.com

Books Authored by him:

- ➔ Building a Lean Service Enterprise (Productivity Press, 2017)
- ➔ How Can I Help You – 5 Mistakes to Avoid in Customer Service (Random House, 2013)
- ➔ Lessons in Lean Management (Westland, 2012)
- ➔ Lean for Service Organisations and Offices (ASQ Press, 2008)
- ➔ 5S for Service Organisations and Offices (ASQ Press, 2007)
- ➔ Lessons in Six Sigma (Sage, 2004)
- ➔ Quality in Business (Sage, 2003)
- ➔ The Manager's Handbook for TQM (Beacon Books, 1997)

Pioneering Efforts:

He is credited with pioneering the following:

- ➔ Creating many tools and techniques required for lean management
- ➔ Developing world's first holistic approach for service lean deployment
- ➔ Formulating a blueprint for 5S deployment in service enterprises
- ➔ Leading Asia's first enterprise-wide lean deployment in a service company
- ➔ The DEB-LOREX™ model

"I would like PEX Network to be most authentic and sought after information source for process optimisation, customer-centricity and organisational transformation."

MY ESSENTIAL OPEX TOOLKIT INCLUDES...

My toolkit includes three essential items. First, knowledge of all the tools and methodologies that have guided my delivery over the past 15 years (i.e., Lean Six Sigma, Business Process Management, Change Management, etc.). Next, strong business and financial acumen to lead intelligent conversations up and down the organization. Finally, the discipline to know the right solution and approach to drive execution and achieve stated goals.

Kevin Wojcikewych,
Vice President, Business Optimization at **Chiltern**

Engineers with process reengineering skills coupled with programming skills to be able to design SmartTech solutions with APIs or RPA, ETLs, OCR/ICR or Workflow solutions.

Jon Theuerkauf,
Managing Director and Group Head of Performance Excellence at **BNY Mellon**

I am not "wedded" to specific tools per se as I'm open minded about any tools that allow me to leverage the following approaches: LEAN/Six Sigma and Theory of Constraints. The key data needed from tools of any kind include: Process maps, Cost per Transaction, inventory flow, takt time (both end to end as well as task by task), DPU quality measurement, etc.

Jeff Brown,
Head of Worldwide Operations, **CNA Insurance**

The freedom to experiment. Because today's process improvement and innovation priorities cannot afford the delays caused by lengthy IT queues and skills shortages.

Dan Morris,
Managing Principal at **Wendan Consulting**

Persistence, humility and a thick skin!

Yr Gunnarsdottir,
OE / CI Process, Leadership at **Royal Dutch Shell plc**

Fundamental routines and key improvement habits that enable the business to make small changes and improvements every day without necessarily having to launch a large scale project. Feedback embedded in everyday business and closed loop amongst employees and with the customers delivers a real mindset shift. More sophisticated tools and techniques can only be implemented on this solid foundation.

Nigel Warren,
Managing Director, **On Tap Marketing**

Built on a fundamental set of core beliefs. Among these beliefs is the need for: an explicit connection between strategy and business targets; leaders who have a deep understanding and commitment to Operational Excellence and relentless focus on customer centricity. As a result my toolkit provides an integrated and holistic approach comprised of traditional Continuous Improvement methods and tools, systems and data. I combine this with a unique focus on developing an understanding of competency related gaps across the organization. These gaps are then addressed through focused learning interventions within the context of an individual's day to day work.

Dr. William A. Cohen,
Major General, **USAF, Ret.,** President and Founder, **The Institute of Leader Arts**

The ADDI BPM/BPMS project methodology and creativity. I also believe that BPMS tools that conform to iBPM concepts, that can generate both transaction and social apps, and have moved to produce "low code" solutions, are invaluable to companies who are serious about OPEX and the transformation needed to drive it.

Erika Toth,
Group Head of Business and Continuous Improvement, **Thomas Cook Group**

Principles, values, and concepts of Peter Drucker, "The Father of Modern Management."

Lisa Norcross,
Head of the Center of Operational Excellence, **E.ON**



WHAT WILL PROCESS EXCELLENCE LOOK LIKE IN 2025?



I'm not sure the definition of process excellence would be different in 2025 as it is now. However I do anticipate that the people performing process excellence will continue to drive towards a heavier reliance on technology and the people themselves become knowledge workers. My definition of process excellence is as follows: The development and execution of processes that continuously results in service delivery which is Better, Faster and Cheaper than it was the day before, delivering the Right level of Service, to the Right Customer, at the Right Time.

Jeff Brown, Head of Worldwide Operations, CNA Insurance



It will be entirely different than today. Surviving companies will have adopted an ongoing Enterprise Transformation philosophy that is led by a Digital Transformation strategy that is defined within the context of business strategy. This will set the design requirements for a modernization of IT and result in a new IT infrastructure architecture and portfolio. Applications will be divided into three groups – core applications (HR, Finance, Legal, etc., that must be in place but offer no advantage) will form the first group. These will never provide a competitive advantage and can be supported on licensed software. The second group will be custom built backroom applications. BPMS generated applications created by a collaboration between the business and IT will replace current legacy applications in this group. These applications actually are the workhorses of the company. The third and final group are the applications that provide competitive advantage, which will be created by BPM/BPMS staff located in the business units. The second and third groups of applications will be generated by people in the business areas using low code (by then probably “no code”) BPMS tool suites. These business process specialists will bridge

the business/IT gap and redesign the business in the BPMS environment and then generate the solutions. The OPEX people located in the business areas will work closely in an open collaboration model with IT data, hardware, tool, communication specialists and others. This will produce a process excellence capability that is nimble, responsive, collaborative and both low risk and low cost.

Dan Morris, Managing Principal at Wendan Consulting



Process Excellence has to do with strategy and the tactics used in its application. However, there can be no single correct strategy of excellence because there are too many variables which are different in each situation and organizational environment including resources, mission, and society.

What can be done is to develop and implement basic principles which will result in process excellence in widely varying circumstances. Therefore to the extent that organizations focus on improvements in their ability to develop and implement ways to better serve their constituents within their environments, process excellence will improve on into the future.

Dr. William A. Cohen, Major General, USAF, Ret., President and Founder, The Institute of Leader Arts



Process excellence in 2025 will be more integrated. Today in most large enterprises there are too many competing fiefdoms fighting for business improvement territory, influence and budget. How can you have The Head of Operational Excellence reporting to the COO, the Head of innovation reporting to the CEO and the Head of Enterprise Architecture reporting to the CIO?

Nigel Warren, Managing Director, On Tap Marketing

2025

WHAT WILL PROCESS EXCELLENCE LOOK LIKE IN 2025?



Over the next decade effortless customer experience will become increasingly more of a differentiator for businesses - and as a result of this it will be even more important that the underlying processes are perfect enablers for the organizations' customer centric attitude. Our processes need to be customer focused - not only the processes in the front line, but all processes everywhere need to take a truly customer centered view that help the organization deliver seamless customer experience.

We also need to realize that Customers change, their expectations are influenced by multiple factors often outside of the direct interaction with the business, therefore the businesses' need to be more agile, and adapt quickly with their ways of working and operation. The internal processes should be flexible, more easy to adjust and promote innovative change.

Across all industries the companies will need to demonstrate the ability to continually evolve and improve their processes and ways of working - this skill will be built into the organizations' DNA through the high skilled, high performer employees. Process excellence will have to shift balance from project focused approaches (which dominate in most organizations today) to more soft, blended-in approach to allow innovation, agile change.

Erika Toth, Group Head of Business and Continuous Improvement, **Thomas Cook Group**



The bar will be set higher for achieving process excellence in the future. Technology, especially robotic process automation (RPA) and artificial intelligence, coupled with the advancements

made with 'big data' and analytics will allow organizations to focus their efforts on process & product innovation. Competition will be tougher than ever, and process differentiation will be crucial for profitability and survival.

Kevin Wojcikewych, Vice President, Business Optimization at **Chiltern**.



The basic toolkit from Lean, Six Sigma, and so on is unlikely to change so much (evolution not revolution) but what I would hope to see is a much more developed level of thinking about the softer aspects of implementing this type of change, for example, senior leadership engagement and coaching.

Lisa Norcross, Head of the Center of Operational Excellence, **E.ON**



For many, process excellence in 2025 will look the same as it does today unless we radically challenge the status quo. We will have to shift our mind-set from planning to execution. It will require leaders to empower employees in our effort to drive consistent delivery underpinned by day-to-day improvement. Employees at all levels will know what is required since leaders will model necessary behaviors and mind-set and will invest the time and effort to cascade and translate expectations into every level of the organization. Success will see process excellence transform from something that is "done" to an organization into the enabler of value delivery at the core of everything done within an organization.

Yr Gunnarsdottir, OE / CI Process, Leadership at **Royal Dutch Shell plc**

2025

ABOUT THE PEX NETWORK



The Process Excellence Network is a global community for process professionals, business leaders and executives who want to improve their businesses through process and operational excellence. With a global membership of 130,000+, and a burgeoning global portfolio of live events, webinars, and networking opportunities, our mission is to inspire and inform our members with access to practical advice on business improvement tools, methodologies and technologies in order to achieve their business goals.

PEXNetwork.com provides expert commentary and learning resources developed by experienced process professionals and industry insiders. The focus is on peer to peer sharing of what it really takes to harness the power of people, process and technology and improve business operations. Coverage includes Business Process Management (BPM), Robotic Process Automation (RPA), Lean, Change Management, Operational Excellence, Six Sigma & Quality, Performance Management, Information Technology Trends and Customer Experience.

What will Process Excellence Look Like in 2025?

Let us know at futureofpex@iqpc.com

www.pexnetwork.com



Find out more about PEX Network's Global Advisory Board at www.processexcellencenetwork.com/advisory-board