

Choose to attend up to four workshops to benefit from comprehensive training across key strategic areas, or select only one workshop that supports your current goals. Simply state your workshop choices at point of registration.

8.00 Check in for workshop attendees and morning networking

8:30 WORKSHOP A: Building a Culture of Operational Excellence

- Getting better at getting better: What does a culture of operational discipline really mean?
- What is the role of culture in achieving operational excellence?
- What are the core values, behaviors, etc. necessary to achieve operational excellence?
- How can leaders create this culture within their organization?
- How decisions of “who does what where” affect your ability to achieve operational excellence
- A different way of looking at the business architectures that underpin how you organize the business, manage process, conduct operations, and even support IT
- The new performance standard: Establishing principles and structures that begin with safety - and then applying them to other areas of the business
- How do you assess and measure culture?

8:30 WORKSHOP B: Asset Management Strategies: Best practices for sustained asset reliability improvement

- Applying operational excellence tools to enhance asset reliability and performance
- Addressing reliability and integrity challenges
- Why should we change?
- Asset optimization: Framework approach to establishing an asset management and reliability program
- Evaluating your ‘as-is’ baseline and setting your ‘to-be’ improvement goals
- Who should be involved
- How to do we measure improvement (Establishing KPIs)
- Gaining executive and employee support
- Managing the human side of reliability: getting employees at all levels to consistently perform monitoring, root-cause analysis, follow-through and more

10:30 Morning networking break for workshop attendees

10:45 WORKSHOP C: Digital Transformation: Driving operational excellence through effective, reliable data and information management

Though guided examples and by understanding real-world examples, this workshop will help you:

- Access how your current management of critical data and information is impacting your ability to achieve operational excellence
- Understand how better management of change prevents operational inefficiencies and critical errors, as well as reducing the risk of failing compliance tests
- Get control of the documents that are key to your projects, including the ability to manage collaboration both inside and beyond your organization begin with safety - and then applying them to other areas of the business
- How do you assess and measure culture?

10:45 WORKSHOP D: Process safety and Operational Excellence: Realizing the connection between safe operations and efficient operations

- What does it mean to achieve excellence in health and safety?
- Integrating safety performance improvement with Operations Excellence and management systems
- Constructing a health and safety program that is not only effective in limiting incidents, but that is optimized operationally
- World class incident management is no accident
- Integrating process safety together with personal safety in decision making
- The new performance standard: Establishing principles and structures that begin with safety - and then applying them to other areas of the business
- What’s required to be successful? Designing a model that’s broad enough to be applicable to all of your assets
- Creating a culture of standardized processes that lead to integrated operations and management
- Creating standardized approaches to various business functions: Centralizing knowledge and oversight, while giving flexibility in implementation

12:45 Networking Luncheon for workshop attendees

1:15 WORKSHOP E: Delivering Knowledge to Employees, When and Where they Need It

Revealing the results of a recent benchmarking study highlights where organizations are today, what the current trends are and where industry is headed in the future, in terms of the delivery of knowledge to employees across an organization.

Methods and systems for:

- Identifying areas of high ROI
- Aligning Training, Standard Work Instructions and On the Job Support
- Building a foundation for future technology adoption will be outlined

This highly interactive workshop will include best practise from real world scenarios in the some of the world's leading process and manufacturing companies.

Todd Muscroft, *Country Manager, USA, Procedure Accelerator*

Todd is a Knowledge Management professional with over 25 years of Designing, Developing and Deploying knowledge solutions that improve the productivity and effectiveness of workers. A licensed educator with a Bachelor of Education from UNB, his combination of education and experience has made him a valuable consultant on Knowledge Solutions in high risk process industries.

1:15 WORKSHOP F: Cost Benchmarking: Reducing Cost and Complexity in your Operations

Much of the value created by the refining and petrochemicals industry over the past decade has been soaked up by complexity and inefficiency. Increased regulation, inattention to costs, depletion of easy-to-exploit resources and a talent shortage have dealt a fundamental blow to industry profits—a blow that is now magnified with low oil prices.

This workshop will give you the opportunity to identify the key levers for driving out cost and complexity in your operations. Learn how you can fight back by participating in group discussions – we'll examine 5 key levers for drive out cost and complexity in your operations now including:

1. Optimising Headcount and Talent
2. Improving Workforce Efficiency
3. Standardizing Technologies
4. Enhancing Supply Chain Collaboration
5. Optimising Maintenance

When used correctly the above levers can deliver sizable improvements to efficiency, agility and, ultimately, financial performance.

3:15 Networking break for workshop attendees

3:30 WORKSHOP G: Delivering Operational Excellence: Leveraging process and people to drive high performance

In this fun and engaging workshop, we will dive into the big questions: How would you approach improving performance at your organization? What information would you need? What tools would help you along the way? How would you know if you had succeeded?

Our interactive workshop takes you step by step through creating a program for achieving high performance. We use a systematic approach to intervention and change, taking you on a journey through the development of an Operational Excellence program which focuses on leveraging the capability of your people and the existing procedures and processes. We examine the ways in which teams and individuals can be supported during a project to work more effectively, and finally we examine the technology that's available to help.

In this workshop, you will:

- Dig into the challenges of getting processes, policies and procedures from the desktop to the work floor.
- Engage your creative problem-solving skills to address real challenges in your organization.
- Learn how to control the process of change.
- Collaborate on challenges and solutions with other workshop attendees in groups and teams.
- Identify ways of enhancing performance and reducing risk at each stage of the project.
- Learn how to reduce operational variations across different business areas by systematically improving work control and compliance to deliver performance improvement. The course facilitator will then take you through an intervention program which examines how to link competence and work activities to achieve high performance and Operational Excellence.

Edi Gittenberger, *CEO, Rider International*

Cason Swindle, *Director, Workforce Performance Solutions, Rider International*

3:30 WORKSHOP H: Systematic improvement: Leveraging your Operations Management System to drive high performance

- Taking a systematic approach to improvement
- Mitigating implementation risks
- Ensuring compliance
- Building the most compelling case for deeper
- OMS commitment
- Getting leadership to focus on and support your OMS
- Removing barriers to change: Creating a sustainable operational excellence culture
- Developing a strategy to gain buy-in from your workforce
- Overcoming the change management hurdle: Cultural considerations

5:30 Workshops Conclude

7:00 Registration and check in

8:00 Welcome from conference director
Leslie Allen, *Global Director, IQPC*

8:05 Chair's opening address

8:15 **Operations Excellence: Building a lean, but effective organization to thrive in every market environment**

**KEYNOTE
PANEL**

- Identifying the strategic value levers and performance improvement opportunities in your company
- How to truly determine how reliable, safe and efficient your operations are – and then set targets for change. What is the benchmark?
- Setting clear goals and targets for operations excellence
- Aligning leadership and the rest of the organization

9:00 **Putting transformation into action: A story of cultural change**

**CASE
STUDY**

The philosophies and programs of cultural and operational transformational are necessary and useful. However, there is often a large gap between the conference room in which programs are devised and the front-line where they are executed. Matt DiGeronimo will share his story about fundamentally transforming the cultural, operational, and financial underpinnings of a failing coal-fired power plant in less than one year's time utilizing the principles outlined in the book he coauthored, "Extreme Operational Excellence". This story will highlight the challenges of modifying the thought-processes and operational models that had been ingrained for decades in the minds of front-line supervisors despite the knowledge of the likelihood of a plant shutdown due to its failing financial performance.

Matt DiGeronimo, *Vice President, Operations, Veolia*

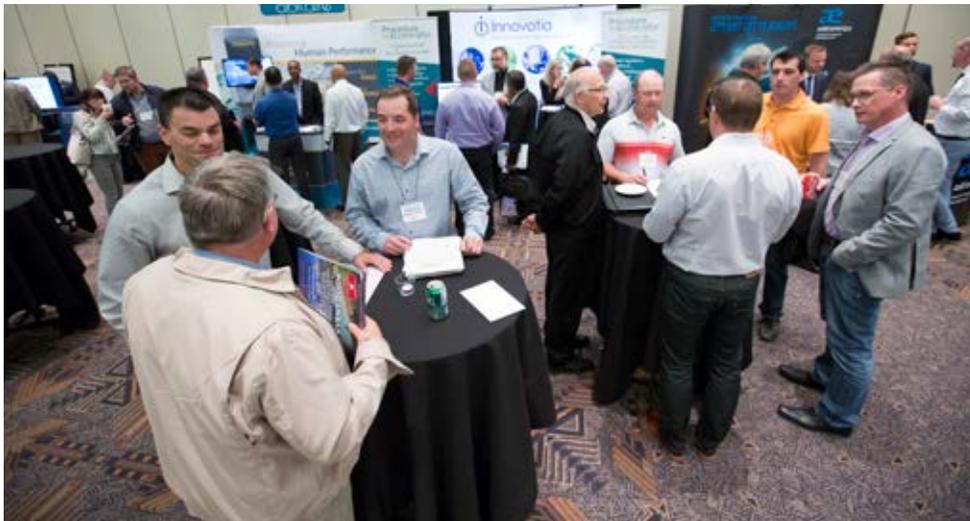
"One of the best presentations I have ever seen. Very valuable."
Tom Shetina, Vice President,
Refinery Operations, **HollyFrontier**

9:40 **Maximizing business impact through a holistic approach to continuous improvement and OE: Lessons learned from a 10 year journey at Shell Downstream**

**KEYNOTE
ADDRESS**

Michiel Van Noort, *Global Head of Continuous Improvement, Downstream, Royal Dutch Shell*

10:20 Networking Break



Choose between Tracks

OPERATING MODEL REDESIGN

10:40 Strategy to execution: Making the most of a your situation to build a stronger organization

- What should you be focusing on for the next year to ensure that the fundamental performance of your business will be better in 2 years than it was 2 years ago?
- How can you focus the company's limited resources in this environment to help deliver these improvements?
- What can we learn from previous downturns to help transform how you are working today?
- What does the landscape look like for the next generation of refining and petrochemicals workers

11:10 Cost benchmarking: Reducing cost and complexity in your operations

This hands on workshop style session will give you the opportunity to identify the key levers for driving out cost and complexity in your operations. Learn how you can fight back by participating in group discussions – we'll examine 5 key levers for drive out cost and complexity in your operations now including:

1. Optimizing Headcount and Talent
2. Improving Workforce Efficiency
3. Standardizing Technologies
4. Enhancing Supply Chain Collaboration
5. Optimizing Maintenance

11.40 Sustainable Business Models: Redefining what is core



12:10 Networking Luncheon

LEADERSHIP & CULTURE

10:40 Understanding the connection between culture and safety, environmental and financial performance

- What is a “High Reliability Organization”?
- What’s the link between culture, reliability and Operational Excellence?
- With so much volatility and risk in hazardous industries today – what impact can culture change can have on safety performance? environmental performance? compliance? financial performance?
- Where should the responsibility for changing culture sit in an organization?
- Can you measure organizational culture?
- Where do you start when it comes to changing culture?

11:10 Drive Breakthrough Reliability Improvement Using the Voice of the Experts

- Who are the experts in your organization?
- How do you unlock breakthrough idea generation?
- How can you transfer plant to-do lists into reliability results?

Julie Thyne, *Gulf Coast Continuous Improvement Leader*, **Dow Chemical**

11.40 Driving Operational Excellence to the Frontline: How to translate the business strategy into action

- Boosting efficiency and safety performance: having the right people in the right roles and managing change effectively
- Detecting whether your work environments, systems and processes are increasing the likelihood of a risk occurring

Nev Lockwood, *Global Operational Excellence Director*, **Albemarle**

Choose between Tracks

HSE EXCELLENCE

DIGITAL TRANSFORMATION

1:00 Incident Management: Why are we still failing to learn?

PANEL DISCUSSION

- What are we doing differently since Texas City, Macondo, Space Shuttle Columbia?
- Review of how inadequate 'learning from incidents' processes have been identified as contributory factors in major accidents
- What is holding us back from learning from incidents?
- Understanding the human and organizational factor causes of an incident through appropriate investigation approaches
- Using multiple opportunities for learning to optimize changes that lead to a lower risk work environment
- Getting leaders to involve leaders in incident management – the critical role of front line supervision
- Implementing effective learning - and changing practices for the long haul

Patrick Wallior, CSP Senior Director of Health & Safety, **Univar**

1:30 The Ten Common Adverse Conditions in Organizations That Failed to Prevent the Next Accident

INTERACTIVE SESSION

Based on observations, discussions, and assessments from thirty-five years of working in various hazardous endeavors, including the recovery from the Texas City and Macondo incidents in the oil and gas industry, and the Challenger and Columbia space shuttle incidents, Jim Wetherbee will present a list of ten adverse conditions that commonly existed in many organizations before they experienced major disasters or minor accidents. In sociotechnical systems used to control risk, improve performance, and accomplish goals, five of these ten adverse conditions existed on the technical side, and five were on the social side. By turning hindsight into foresight, participants can learn how to use the presence and severity of these adverse conditions as indicators to determine if their organization may be drifting toward a disaster.

This highly interactive workshop style session is one you don't want to miss!

Jim Wetherbee, Astronaut, Former Vice President, Operating Leadership, **BP** Author, **Controlling Risk: 30 Techniques for Operating Excellence**

2:00 Instilling a Zero Loss of Containment Mindset: A Journey to Process Safety Improvement through Operational Excellence

CASE STUDY

- A Case Study in holistic process safety improvement, in which you can learn
- How to overcome skepticism and gain buy-in from all levels of the organization,
 - How Controlling, Human Resources, and Business Management impact Process Safety performance,
 - Successful practices for setting expectations and developing employee engagement,
 - How environment influences behavior, and
 - How operational excellence improves Process Safety and Business performance

Gregg Kiihne, Director – Process Safety Expert Services, **BASF**

1:00 Digital procedure transformation: Why moving from paper to tablets isn't just a formatting change

Industry 4.0 is all about transforming how work gets performed to take advantage of technology in ways we haven't considered before. This presentation focuses on the transformation of procedures from a paper-based system to a digital system, and specifically how this transformation will change the human interface with procedures. You'll learn some of the key pitfalls that have been discovered, and some tips for successful launch.

Wendy Schram, Operational Excellence Improvement Specialist, **Dow Chemical**

1:30 How simulation will solve the decades-old challenges of training in downstream field operations

Companies operating in high-risk, hazardous environments have been trying to solve training issues in Field Operations for decades. It is challenging because:

- The aging workforce: skilled, experienced employees are leaving
- Competency problem: new, inexperienced workers are filling the gap
- Workforce mobility: churn rate impacts knowledge capture and transfer
- Challenges with on-the-job-training
- Whether or not you have correctly written procedures, in digital format or printed out, it does not solve the old training challenge: how do I teach this so that you retain it?
- Standardization of training material and delivery across the organization

For many, the solution is simulation: bringing the field into the classroom environment.

Training is a crucial, if not the most important, part of Operational Excellence in field operations. Simulation is the key to success but we will present a new form of simulation that boosts productivity and supports the entire lifecycle of field operators: training, planning and executing procedures.

Enhanced Reality will solve these decades-old training challenges.

Christian McDermott, US Country Manager, **Voovio**

2:00 Human Factors meets Data Analytics & Safety and introduces everyone to Lean Six Sigma at Chevron

- A taste of leveraging new views on Safety and Data analytics as part of Lean Transformation
- Take Lean Sigma tools to the next level in support of "the human factor" at your sites
- Simple ways to integrate Human factors engineering into your current safety toolbox
- Examples of digital tools (Gamification, Podcasts, LCD, Sound Bites) to get the right data analytics to the right levels of your organization using Lean Six Sigma

2:30 **Solution Insight Sessions and Demo Drives**

Branded as “the best networking session I’ve ever attended” by a number of past Summit delegates, this structured networking session is the ideal opportunity for you to capitalise on time out of the office by speaking to each of your peers in attendance and learning about the solutions available to your specific OE challenges.

How does it work? It’s easy. You spend five minutes at a table of your choice, and when the bell rings you’ll be directed to the next one to start another round of networking. At the end of the session you’ll have met most of your peers, and if you haven’t, you can continue into the networking cocktail reception at the end of the day.

3:00 **Conducting effective barrier health assessments across facilities and regions**

- Understanding barrier health as a key risk management performance measure
- Assessing barrier health as part of effective self-verification protocols
- Risk-based activity planning as a key element of operational excellence

Hugo Ashkar, *Global Risk Manager*, **BP**

3:40 **Operational Excellence Academies: A Case Study on Albemarle Best Practice**

Twice a year Albemarle holds “Operational Excellence Academies” - a forum that brings together operations supervisors, team leaders, engineers chemists and other supporting functions to discuss how to drive operational excellence across the business. The academies are 3.5 days long for two weeks, and in between them the attendees are required to execute a continuous improvement project to present to the Manufacturing Council. The highlights of the program are not just the learning, but the networking, empowerment, and access to senior leadership for all of the attendees. Nev Lockwood will share the story behind these “Operational Excellence Academies” and share insight into what kind of an impact they’ve had on business performance. This is a case study you dont want to miss!

Nev Lockwood, *Global Operational Excellence Director*, **Albemarle**

4:20 **Controlling Risk In A Dangerous World: 10 Principles of Operating Excellence**

How do operators prevent the next accident? How do they prevent unpredictable accidents? Can they simultaneously improve performance? On the front lines of danger, your employees are the last line of defense trying to prevent death and destruction. What happens if they don’t succeed? After accidents, organizations typically issue new rules. These will work—until the next accident. Again, new rules are issued and procedures are updated. Yet, the cycle of accidents continues. Organizations and operators must need something more than rules and procedures to prevent unpredictable accidents. The solution is found in the principles of operating excellence.

Since the beginning of the space program, astronauts have been following these principles and developing techniques to help flight crews stay alive and accomplish dangerous missions in the unforgiving environment of space. In Controlling Risk, you will learn how to operate better, work together, and improve performance in your high-risk business to accomplish much more in your dangerous world!



Jim Wetherbee, *Astronaut, Former Vice President, Operating Leadership*, **BP**

Author, Controlling Risk: 30 Techniques for Operating Excellence

With thirty-five years of experience in high-hazard operational environments, Jim works with leaders in hazardous industries with critical mission objectives. He is the only American astronaut to have commanded five missions in space, and is the only person to have landed the Space Shuttle five times. Jim earned a Bachelor of Science in Aerospace Engineering from the University of Notre Dame in 1974. He began his career as a Naval Aviator aboard the USS John F Kennedy, flying the A-7 Corsair. After graduating from the US Naval Test Pilot School, Jim performed flight-testing of the F/A-18 Hornet. In 1984, Jim was selected to join NASA in its tenth group of astronauts. Over a twenty-year career, he flew six times on the Space Shuttle. The five-time commander flew two missions to the Russian Space Station, Mir, and two missions to the International Space Station. In 1998, he was appointed as the Director, Flight Crew Operations, specifically selected to improve the flight and ground safety in the astronaut corps. Based on that success, Jim was selected after the Columbia accident to enhance the safety aspects in the organizational culture at the Johnson Space Center, home of NASA’s human space flight program. Bringing his experience from the aerospace industry as a former NASA executive and astronaut, Jim joined the oil and gas industry as a Safety and Operations Auditor for BP. Four years later, he was selected as a VP for Operating Leadership. In this role, he supported efforts to improve performance results consistently over the long-term, by emphasizing effective leadership behaviors as a key way to influence and inspire people to conduct safe and high-quality operations. After successful careers in naval aviation, aerospace, and the oil and gas industry, Jim is passionate about helping leaders and operators perform successfully in hazardous environments.

5:00 **Day One closing remarks and conference adjourns**

Networking Cocktail Reception for all Conference Attendees, Speakers and Sponsors



7:30 **Networking Breakfast and Check In**

8:00 **Chair's Opening Remarks**

8.10 **The Consequences of Not Knowing what You Don't Know**

**EXPERT
INSIGHTS**

All individuals that take on the responsibility of being part of a coordinated function (regardless of their assigned goals or expected outcomes) generally bring with them specific expertise. Relative to the Chemical Safety Board's CDL regarding emergency response and emergency planning, this holds true regardless of whether ones function is hazardous materials response, emergency response, first aid response or Incident Command leadership. One constant that transcends all domains and activities embodies the fact that each and every individual must come to grips with the realistic understanding that there are aspects of their role(s) that they don't know (as no one can "know it all"). Thus NOT knowing what one does not know is vital to the CSB's goal of incident prevention and saving lives. In this presentation Manny Ehrlich will examine several US Chemical Safety Board investigations and will ask the audience to answer the questions:

- "what is not known in this situation?"
- "what would the possible outcome have been if it were known?"

He'll also examine how companies can establish the mindset whereby it is not only "ok" but essential that everyone learn to function in a multidisciplinary environment with SME's available from each discipline.

Manny Ehrlich, *Board Member*, **US Chemical Safety Board**

8.50 **Human Factors and Procedures: Effective procedural designs and practices**

**HUMAN
FACTORS**

Dr. Camille Peres will share state of the art research on how to mitigate the effects of variables that influence procedural adherence. She will talk about how to implement effective procedural designs and practices for safe and effective operations.

- Leverage the latest research on effective procedural and adherence practices – and understand the hallmarks of highly reliable organizations
- Learn why workers' experience level and task frequency strongly influences procedural adherence
- Implement current "best practices" for safety and hazard statement designs
- Understand how Operational Excellence can be compromised when the content of safety statements do not support comprehension or compliance

Camille Peres, *Assistant Professor, Environmental and Occupational Health*, **Texas A&M University**

9:30 **Applying operational excellence tools to enhance asset reliability and performance**

Explore reliability as a key element of Operational Excellence. In the current economic environment, it becomes "business critical" to use reliability improvement as a strategic lever to defer capital works, reduce operational costs, and ensure your operations deliver the safety, environmental and production outcomes that will make your operations competitive in a cost constrained environment. This exploration will be done by focusing on the "business" aspects of reliability and demonstrate how improved reliability is directly tied to bottom line performance. It will bridge the gap between company strategic leadership and technical leadership and break down barriers to allow both groups to speak the same language and drive to common business goals.

John Quigley, *Director, Operational Reliability*, **Valero**

10:10 **Networking Break**

Choose between Tracks

ASSET PERFORMANCE OPTIMIZATION

10:40 **Managing the human side of reliability: Getting employees at all levels to consistently perform monitoring, root-cause analysis, follow-through and more**

John Quigley, *Director, Operational Reliability, Valero*

PANEL DISCUSSION



11:20 **Reliability Transformation: Driving Standardization and Optimization of Phillips 66 Reliability processes**

- Implementing world-class maintenance and reliability programs that promote safe, cost effective business: what's really required?
- Improving the partnership between operations and maintenance
- Increasing "ownership" by operators in preventing equipment failures and enhancing frontline collaborative root cause analysis
- Building a culture of reliability through governance
 - Reliability process execution
 - Performance management
 - Skills development
 - Operational excellence
 - Change/ communications
- Leveraging the right processes, roles and responsibilities to enable effective decisionmaking, and ensure the effort is on track to deliver value and achieve long-term sustainability

Chad Broussard, *Director, Reliability, Phillips 66*

CASE STUDY

LEADING AND SUSTAINING OE

10:40 **Leading Millennials to Operational Excellence**

Everyone seems to have an opinion about the Millennial Generation – positive, negative, or otherwise. Regardless of your opinion, it is difficult to deny that there is a blossoming generation in our industry who grew up in a different environment than the preceding generations. These differences invariably lead to a generation with different perspectives, priorities, and practices. As leaders driving operational excellence within our organizations, it is imperative to understand, embrace, and leverage these differences to maximize our performance. Matt DiGeronimo reflects on his experience working with millennials in the military and the energy industry and presents ideas and suggestions for leading this generation.

This insightful and inspiring presentation will focus on:

- Establishing a mission, a vision, and a purpose for this generation
- Maximizing organizational transparency and accessibility
- Creating an organizational humility that not only listens to its youngest members but wants to listen
- Figuratively flatten the organizational chart by ensuring senior leaders remain engaged with this generation

Matt DiGeronimo, *Vice President, Operations, Veolia*

11:20 **Enabling and delivering OE performance through your OEMS**

Many companies have implemented formal management systems in an attempt to improve execution and achieve Operational Excellence. While a few companies like Chevron, Exxon and Koch Industries have had tremendous success with their management systems, many other companies have found their management system has become bureaucratic, costly, and ineffective. Even worse, they have found their management systems added more layers of complexity that further weigh upon the companies' performance. This session will highlight the critical success factors in OMS design and implementation.

- Driving OEMS accountability through governance: why its not just about compliance
- Building the most compelling case for deeper OMS commitment by cascading governance
- Getting leadership to focus on and support your Management System
- Assigning clear ownership and governance for the processes that make up your management system
- Integrating implementation of the management system into the business planning cycle
- Take a risked-based approach

12:00 Networking Lunch

12.50 Moving from compliance to commitment: A Belief Workshop

The human mind works like a machine. Regardless of who you are, where you were raised, what degrees you have or do not have, the patterns that the mind follows will be the same. Once you unlock this pattern, you can understand how to change the way you think, in order to change the way you behave. This concept can also be used to influence others in a positive and encouraging way and the help change the collective culture of a team. In this workshop, we will use compliance-type examples to explore how the mind works and we will practice some techniques that can help move a team from compliance to commitment.

Wendy Schram, *Operational Excellence Improvement Specialist*, **Dow Chemical**

1:30 Building the OE& Risk Management competencies of the future: What skills? What roles?

Today's organisations consist of increasingly complex IT and technological architectures upon which customers, employees and processes – both manual and digital - interact. That means that the role of operational excellence is arguably becoming both more important and increasingly complicated. In this session we'll discuss the new skills and capabilities necessary for OPEX practitioners to help their organizations thrive in today's high-risk and volatile market conditions.

- What does a 21st century operations practitioner look like?
- Understanding the power of human capital for operational excellence
- What skills / what roles are required in the future?
- Optimising your resources: effective productivity benchmarking
- Working with remote teams
- Internal competency development
- Creating networks of excellence to enable knowledge transfer

2.30 Chair's summary and close of conference

