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July 27 & 28, 2004 • The Warwick, New York City



5 reasons to attend:

- Truly **aligning Six Sigma projects with your business strategy** is a huge task – you will learn how to create a successful program that integrates quality and business goals. Clarke American and FSS will show you how they are doing it.
- You will walk away knowing how Citigroup & Wachovia are not only vastly impacting on their current and potential customer's experience through End to End VOC, but also how they are retaining their clients
- Is Six Sigma really having a positive impact on your business? How do you prove it? Bank of America and GE Mortgage Insurance are just two of the companies who will demonstrate how you can systematically capture the financial impact of Six Sigma.
- You will discover how Bank of America have used Six Sigma to facilitate the recent acquisition of Fleet and how you can use Six Sigma to plan for a merger.
- Hear how you can apply quality methodology to Operational Risk and how Six Sigma and Lean can address Basle II & Sarbanes Oxley requirements

INTERACTIVE PRE-CONFERENCE WORKSHOPS • MONDAY JULY 26, 2004.

- Using process management to align Six Sigma projects with business strategy*
- Conquering complexity in financial services - expanding the value proposition*
- Driving the top Line - Six Sigma projects in marketing and other growth revenue projects*

You will hear high-level briefings from our expert panel:

CITIGROUP

Alexis Goncalves, Global Director Quality Intelligence

COUNTRYWIDE FINANCIAL

Jennifer Cohn, Senior Vice President and Director of the FASTER Program

BANK OF AMERICA

Jim Buchanan, Quality And Productivity Executive
Pam West, Operational Risk
John Berry, Senior Vice President, Market and Enterprise Growth

WACHOVIA

Lisa Ducharme, Customer Experience Director
Greg Swindell, Operating Services Sr. Vice President

GE MORTGAGE INSURANCE

Charlotte Tyson, Black Belt & Managing Consultant

CLARKE AMERICAN

Karen Hollingsworth Dement, Vice President Performance Excellence

HSBC – WINNERS OF RATH & STRONG'S AWARD FOR BEST DEFECT ELIMINATION IN SERVICE AND TRANSACTION

Brent Harder, Senior VP Quality

FINANCIAL SERVICESOLUTIONS

Dale Meder, Quality Director

CHECKFREE CORPORATION

Jeff Sturm, Director of CheckFree Process Excellence

VALEOCON MANAGEMENT CONSULTING

Thomas Bertels, Partner, Regional Director Americas

BANK ONE

Darryl E. Greene, Senior Vice President, National Enterprise Operations

THE GEORGE GROUP

Mike George, Chairman & CEO
James Works, President & Chief Operating Officer
Stephen Wilson, Director

BREAKTHROUGH MANAGEMENT GROUP

David Silverstein, President And CEO

JP MORGAN CHASE

Robin Phillips, Managing Director, Corporate Operational Risk

DELEEIJW ASSOCIATES, LLC

Bryan Carey, Executive Vice President & Lean Six Sigma Practice Leader
Joe Walsh, Executive Vice President And CIO

BANK OF NEW YORK

Bridget Pantaleo, Director, Head of Quality
Jackie Cazar, Vice President of Six Sigma

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Dear Colleague,

Six Sigma is not merely a quality initiative; it is a business initiative. The use of Six Sigma methodology is more valuable in financial institutions now than it has ever been and companies are now reaping true savings and revenue growth.

Attend this event to find out how companies such as **Wachovia, HSBC, Bank of America, Countrywide, Huntington Bank, Checkfree Corporation and Clarke American** are all achieving **massive revenue growth** and **huge dollar savings** by correctly aligning Six Sigma with their strategy to satisfy customer and business needs.

They will be discussing:

How to achieve optimum customer satisfaction

You understand the VOC concept...**but is your customer really benefiting from your projects? Are they really feeling an impact?**

Six Sigma experts from **Wachovia and Citibank** will show you how to really impact on the whole customer footprint and how to strategically increase customer loyalty through using Six Sigma effectively.

How to use Six Sigma quality techniques to manage operational risk

Our expert panel will cover fundamental questions such as:

- *How do we lay a foundation through Sarbanes-Oxley and Six Sigma efforts to meet Basel II requirements?*
- *How do we leverage Six Sigma project work to meet Sarbanes-Oxley requirements?*

How increased M&A activity is creating sweeping changes to your sector and will inevitably affect your organization soon

Come and find out how **Jim Buchanen, Bank of America** is using Six Sigma methodology during the planning stage of the **Bank of America/ Fleet merger**.

Last year's conference received awesome feedback, this year we've brought the event to New York and we're looking forward to our best event yet.

See you in New York!



Miranda Turner
Six Sigma For Financial Services Director, Six Sigma IQ

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IQPC recognises the value of learning in teams. Groups of 3 or more booking at the same time from the same company receive a 10% discount. 5 or more receive a 15% discount. 7 receive a 20% discount. Only one discount available per person.

WORKSHOP A: 8.00 – 11.30

USING PROCESS MANAGEMENT TO ALIGN SIX SIGMA PROJECTS WITH BUSINESS STRATEGY:

Participants will learn how to:

- Develop a process management system in line with their business requirements
- Design dashboards and scorecards
- Translate strategic objectives into operational goals
- Analyze dashboards to identify high impact projects
- Allocate resources according to business need
- Avoid unnecessary complexity by keeping it lean and simple

We help clients bring the voice of their customers into decisions regarding strategy, process improvement and organization development. As "expert-coaches" we help clients achieve specific measurable results while ensuring that they "are in the driver's seat" and acquire in working with us, skills that strengthen both individuals and the organization as a whole.

WORKSHOP LEADER : THOMAS BERTELS, PARTNER, REGIONAL DIRECTOR AMERICAS, VALEOCON MANAGEMENT CONSULTING

WORKSHOP B: 12.00 – 3.30

CONQUERING COMPLEXITY IN FINANCIAL SERVICES — EXPANDING THE VALUE PROPOSITION OF LEAN SIX SIGMA

This workshop focuses on conquering complexity—the next frontier of business transformation. The complexity of a service offering is often a larger drag on profits and growth than any other single factor in the business. This is particularly apparent in Financial Services where large-scale consolidation, globalization, and product expansion have been the drivers for growth AND for business complexity.

The potential represented by conquering complexity—making explicit decisions about what complexity to get rid of and what to

keep and exploit—has proven to be enormous. Join us for an interactive simulation to discuss:

- How complexity drains time and resources in financial services
- The impact of complexity on shareholder value
- Understanding the cost impact of complexity
- Eliminating process complexity with Lean Six Sigma
- Making complexity a strategic weapon—how Capital One, Southwest Airlines and Wal-Mart conquered complexity and won market dominance

**WORKSHOP LEADER : JAMES WORKS, PRESIDENT & CHIEF OPERATING OFFICER, GEORGE GROUP
STEPHEN WILSON, DIRECTOR, GEORGE GROUP**

Attendees will receive a copy of *Conquering Complexity in Your Business* (McGraw-Hill, June 2004). Written by Michael George, author of *Lean Six Sigma* and *Lean Six Sigma for Service*, and Stephen Wilson, this book provides new insight and methodology on conquering business complexity.

Workshop C: 4.00 – 7.30

DRIVING THE TOP LINE – SIX SIGMA PROJECTS IN MARKETING AND OTHER GROWTH REVENUE PROJECTS

The expectations of "savings" has led just about every Six Sigma company to focus on projects resulting in cost reductions, but what about applying Six Sigma to projects that contribute to revenue growth? Of course improving the bottom line through defect reduction and throughput improvements will always be a positive move, but when Six Sigma projects can target revenue improvements; the benefits can be much greater. In most businesses, unless already controlling 80% or greater market share, the top line is relatively unbounded. In this workshop you will learn about the application of Six Sigma to sales and marketing for the purpose of driving the top line through:

- Applications of Six Sigma tools to marketing and sales
- Practical starting points for process improvement efforts
- Developing project ideas for enhancing sales and marketing activities
- Using the right metrics to monitor the success of projects
- Integrating changes and spreading best practices throughout sales and marketing
- Assessing sales and marketing activities to optimize resources

WORKSHOP LEADER : DAVID SILVERSTEIN - PRESIDENT AND CEO, BREAKTHROUGH MANAGEMENT GROUP

SIX SIGMA FOR FINANCIAL S

Day One: Tuesday July 27, 2004

7.45 COFFEE AND REGISTRATION

8.15 CHAIRMAN'S OPENING SPEECH AND INTRODUCTION
JAMES WORKS, PRESIDENT & CHIEF OPERATING OFFICER, GEORGE GROUP

8.30 **KEYNOTE PRESENTATION: AMPLIFYING VOC THROUGH INNOVATION**
Blending VOC with innovation helps companies break from industry orthodoxies; aligns people around specific innovation opportunities; efficiently generates quality improvement projects; provides incentives for employees to innovate, uses smart discovery and invention methods, and streamlines decision-making. This presentation will address three major elements for organizational success in blending VOC with innovation: Customer Intelligence, Customer Intimacy and Customer Innovation. These elements are based on Deming's theory of profound knowledge, Kano's model for attractive quality creation, and Csikszentmihalyi's concept of Flow.
ALEXIS GONCALVES, GLOBAL DIRECTOR QUALITY INTELLIGENCE, CITIGROUP

9.15 **STRATEGY ALIGNMENT WITH QUALITY DEPLOYMENT**
Recipient of the 2001 Malcolm Baldrige National Quality Award and honored by the Quality Texas Foundation as the sole recipient of the 2001 Texas Award for Performance Excellence. Clarke American has a rigorous Project Management process for producing breakthrough improvement. Karen will provide an overview of the company's annual approach to breakthrough change (Key Company Projects) as a product of a dual focus that produces breakthrough change and continuous improvement.

In this session Karen will:

- Show a linkage between the strategy development/deployment process and annual selection of vital few improvement initiatives.
- Utilizing the Balanced Business Plan and Goal Deployment
- Highlight the tools used to support this activity (Business Case Development Tool, Project Prioritization Grid, Teams Disciplines Documents)
- Address the parallels between Clarke American's discipline like Six Sigma project management process and other breakthrough improvement initiatives.

KAREN HOLLINGSWORTH DEMENT, VICE PRESIDENT PERFORMANCE EXCELLENCE, FIRST IN SERVICE PERFORMANCE EXCELLENCE, CLARKE AMERICAN

10.00 **TECHNICAL INSIGHT SESSION PRESENTED BY BMG** 

10.10 COFFEE AND NETWORKING BREAK

10.40 **'FASTER THAN SIX SIGMA' - COUNTRYWIDE'S EXPERIENCE**
Based on Six Sigma, the 'Faster' program at Countrywide Financial has 2 major differences: 1) There is no mandate; and 2) It is created for, and not adapted to, financial services. Jennifer will examine the challenges of setting up the Faster program and demonstrate how the FASTER program, with over 600 certified project managers, has achieved over \$100m savings... with no mandate.

- What degree of centralization should there be and who should participate in the program?
- What is the right balance to get the appropriate level of buy-in and how many employees should you have trained and certified and at what level?
- How do you ensure that the program fits with your organizational culture?
- Shortening the mortgage origination cycle - a recent successful project

JENNIFER COHN, SENIOR VICE PRESIDENT AND DIRECTOR OF THE FASTER PROGRAM, COUNTRYWIDE FINANCIAL

11.25 **DELEEUW ASSOCIATES WILL INTRODUCE THE SUBJECT OF OPERATIONAL RISK AND IDENTIFY HOW TO MAKE LINKAGES WITH SIX SIGMA, FOLLOWED BY A PANEL SESSION TO DISCUSS KEY RISK AVOIDANCE ISSUES.**

SARBANES-OXLEY AND CAPITAL ACCORD REFORM ARE COMING. ARE YOUR PROCESSES READY?

Capital Accord Reform (Basel II) requires financial institutions to demonstrate that they have operational risks are under control; and Sarbanes-Oxley Act of 2002 requires financial institutions establish and maintain adequate control structure and procedures for financial reporting. Can Lean and Six Sigma

play a major role in meeting these requirements? The answer: Lean and Six Sigma methodologies can address many of the issues that financial institutions are facing when dealing with regulatory compliance issues. Here are some examples:

- The need for data
- The need to show your process
- The need to demonstrate processes are under control
- The need for an infrastructure

These and other related issues and opportunities will be discussed with our panel.

BRYAN CAREY, EXECUTIVE VICE PRESIDENT AND LEAN SIX SIGMA PRACTICE LEADER, DELEEUW ASSOCIATES, LLC
JOE WALSH, EXECUTIVE VICE PRESIDENT AND CIO, DELEEUW ASSOCIATES, LLC

- How is Six Sigma helping risk analysis in banks
- Is there a need to launch six sigma initiatives to address new regulations
- How to leverage the benefits of six sigma methodology

PANEL:

■ **ROBIN PHILLIPS, MANAGING DIRECTOR, CORPORATE OPERATIONAL RISK, JP MORGAN CHASE**

■ **ALEXIS GONCALVES, GLOBAL DIRECTOR QUALITY INTELLIGENCE, CITIGROUP**

■ **PAM WEST, OPERATIONAL RISK, BANK OF AMERICA**

12.25 **BANK OF AMERICA CASE STUDY: PROVING SIX SIGMA ROI IN A SALES & MARKETING ENVIRONMENT**

Bank of America is one of the premier sports marketing organizations in the United States. John will be discussing a Six Sigma project that he led to demonstrate the return on investment gained from Bank of America's sports sponsorships. The project demonstrated more than 20 to 1 return on the top line and a more than four to one return on the bottom line. The project also established a target profile for the most profitable customers to invite to sponsorship events. The project was focused on revenue enhancement rather than expense savings and had a systematic means of capturing financial impact.

- Translating Six Sigma principles and making them practical & relevant to marketing practices at Bank of America
 - Understand what makes Sales and Marketing tick and get your communication right
 - Bringing process discipline to your brand and marketing organisation
- JOHN BERRY, SENIOR VICE PRESIDENT, MARKET AND ENTERPRISE GROWTH, BANK OF AMERICA**

13.10 LUNCH

2.40 **HSBC CASE STUDY: USING SIX SIGMA TO IMPROVE TRADING CAPABILITY IN RETAIL BROKERAGE**

HSBC will be giving you an update on the successful merging of three brokerage trading platforms which enabled them to reduce their costs per transactions by over 85%. Brent will be demonstrating:

- How to achieve the lowest execution price per transaction
- The right tools for the right transaction
- Methods to improve account opening capability

BRENT HARDER, SENIOR VP QUALITY, HSBC

3.35 **STRATEGICALLY CAPTURING THE CUSTOMER EXPERIENCE**

In her talk, Lisa will provide an overview of the many ways Wachovia strategically gathers information to continuously improve the customer experience and tangible examples of both reactive and proactive improvements that have been made

LISA DUCHARME, CUSTOMER EXPERIENCE DIRECTOR, WACHOVIA

4.20 COFFEE AND NETWORKING BREAK

4.50 **CUSTOMIZING SIX SIGMA DEPLOYMENT TO ORGANIZATIONAL NEEDS IN FINANCIAL INSTITUTIONS**

Thomas will be giving case study examples of organizations who have successfully tailored their Six Sigma implementation strategy to match the needs of the business:

What are the critical success factors for deploying Six Sigma?

Designing a program that fits organizational needs

Balancing investment, resources, and business results: case studies

THOMAS BERTELS, PARTNER, REGIONAL DIRECTOR, AMERICAS VALECON MANAGEMENT CONSULTING

SERVICES July 27 & 28, 2004

5.35 Chairman's closing speech

**COCKTAILS AND NETWORKING RECEPTION
SPONSORED BY VALEOCON MANAGEMENT CONSULTING**



Day Two: Wednesday July 28, 2004

8.00 Registration & Coffee

8.45 CHAIRMAN'S OPENING SPEECH AND INTRODUCTION
JAMES WORKS, PRESIDENT & CHIEF OPERATING OFFICER, GEORGE GROUP

8.45 **USING SIX SIGMA TO MAKE THE WHOLE GREATER THAN THE SUM OF TWO PARTS - A CASE STUDY OF THE MERGER BETWEEN BANK OF AMERICA AND FLEET BOSTON**

Jim will discuss the merger of two banks, both of whom use Six Sigma, both with a different approach. Bank of America with a top down mandate and Six Sigma linked very closely to strategic planning and Fleet using Six Sigma rather as a set of tools at project level. Jim will discuss the results of recent surveys on both business and consumer bank customers to get a fix on their expectations of the merger. Bank of America is using Six Sigma tools to do the planning work for the merger. Project managers go through DMAIC tollgates to get approval for activities.

Jim will also discuss use of QFD to develop specifications for new systems built to take the best functionality from each of the banks, the structure of the Six Sigma training program at the banks in preparation for the new emergent bank in late 2005 will also be covered.

JIM BUCHANAN, QUALITY AND PRODUCTIVITY EXECUTIVE, BANK OF AMERICA

9.30 **GETTING STARTED ON YOUR SIX SIGMA JOURNEY: ACHIEVING QUALITY LEADERSHIP THAT DRIVES SHAREHOLDER VALUE**

CheckFree launched Six Sigma in several divisions of the company at different times. This has allowed them to evolve the deployment strategy by learning from their experiences. Discover the things that Checkfree have learnt to incorporate into their strategy and where to spend time right up front in order to lay the foundation for future success. Conversely Jeff will also cover those things that you can do in your strategy that will allow you to make progress, but without a solid foundation and then ultimately cause to pay a price later and cheat your success. A piece of all this is how Checkfree has integrated VOC techniques into core strategic initiatives, so Jeff will share a business case on how they have achieved that and how its also contributed to that foundation.

- Establishing a Foundation for Six Sigma Success
- Integrating VOC techniques into core strategic initiatives

JEFF STURM, DIRECTOR OF CHECKFREE PROCESS EXCELLENCE, CHECKFREE CORPORATION

10.15 **PREPARING FOR SUCCESSFUL LEAN AND SIX SIGMA IMPLEMENTATION AT BANK ONE**

Is your business ready for a corporate wide Six Sigma investment? Darryl will show you the value of using other advanced tools before committing to fully embedded corporate Six Sigma deployment. He will stress the importance of understanding the maturity of your business parts and carrying out controlled piloting prior to full Six Sigma commitment.

You will learn that implementation of a continuous improvement culture and business fundamentals are important for preparation for more advanced tools such as Six Sigma and Lean.

DARRYL GREENE, SENIOR VICE PRESIDENT, NATIONAL ENTERPRISE OPERATIONS, BANK ONE

11.00 COFFEE AND NETWORKING BREAK

11.30 **CONQUERING COMPLEXITY IN FINANCIAL SERVICES TO BREAK THROUGH THE CEILING ON PROFITS AND GROWTH**

The single largest opportunity for cost reduction and the most significant hurdle to profitable growth in most financial services companies is product and service complexity.

Somewhere in your business, there is too much complexity and its cost is enormous in terms of lost profit AND growth. There may also be places where there is too little complexity, where you're missing opportunities by having too few options for your customers. Either way, complexity is imposing a cost on your business, and likely a huge cost. Michael George, co-author of Conquering Complexity in Your Business, will show how the opportunity to become dominant in any market is open to the firm that improves speed, quality, and complexity. Together, this focus will enable significant improvement in your ability to grow profit, revenue, and shareholder value.

MIKE GEORGE, CHAIRMAN & CEO, GEORGE GROUP

12.15 **CUSTOMER PROFITABILITY - USING SIX SIGMA TO BUILD AND MAINTAIN CUSTOMER PROFITABILITY MODELS THAT MAKE A DIFFERENCE**

- How to Define Customer Profitability with Data
- How to Translate Profitability Data Into Sales Terms
- How to Build Actionable Sales Plans Based on Profitability
- How to Use Profitability as a Lever for Differentiation in the Marketplace
- Example of Integration and Execution Resulting in \$15M in Savings First Year

CHARLOTTE TYSON, BLACK BELT & MANAGING CONSULTANT, GE MORTGAGE INSURANCE

1.00 LUNCH

2.30 **MANAGEMENT REINFORCEMENT OF SIX SIGMA POST-IMPLEMENTATION TO SUSTAIN SIX SIGMA BENEFITS**

Dale will present on how a company made to manufacture mortgage solutions for the lending industry has applied the tools of Six Sigma, Lean and Design for Six Sigma. Financial ServiceSolutions has applied all the tools to produce customized, scalable, reliable and predictable solutions for its clients. Financial ServiceSolutions are showing lenders how to share the cost of infrastructure, share the risk of technology investment and reduce their risk in changing markets by engaging a company designed, built and managed with "Lean Six Sigma Lending"® principles

DALE MEDER, DIRECTOR OF QUALITY, FINANCIAL SERVICESOLUTIONS

3.15 **HOW TO HOLISTICALLY INTEGRATE SIX SIGMA WITH OTHER QUALITY INITIATIVES**

- Using TQM, Six Sigma and Voice of the Customer simultaneously in order to maximise quality results
- Achieving balanced business plan/goal deployment
- Compiling successful training initiatives to link six sigma into your strategy: Empower and inspire with training, tools, and accountability
- Retaining and growing existing Partners/Customers
- Establishing a rigorous financial management and reporting system for Six Sigma

BRIDGET PANTALEO, DIRECTOR, HEAD OF QUALITY, BANK OF NEW YORK

JACKIE CAZAR, VICE PRESIDENT OF SIX SIGMA, BANK OF NEW YORK

4.00 COFFEE AND NETWORKING BREAK

4.30 **Driving Innovation through the Six Sigma Lens**

Greg will discuss the change initiatives currently underway in Wachovia's Operating Services Organization aimed at improving operational effectiveness. He will explore innovations that impact :

- Productivity Improvement
- Cycle Time Reduction
- Product Quality

GREG SWINDELL , OPERATING SERVICES - SENIOR VICE PRESIDENT, WACHOVIA

5.15 CHAIRMAN'S CLOSING SPEECH AND END OF CONFERENCE

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Through education provided in multiple forms, mid-management to senior executives are able to make better management decisions. The primary focus of the portal is on optimising individual and organisational performance. The comprehensive site collects, filters and catalogues thought-leading articles, white papers and presentations from premier industry sources on performance management including among others, profitability analysis, cost management, business process planning, IT Management and performance measurement.

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Please note that speakers and topics were confirmed at the time of publishing, however, circumstances beyond the control of the organizers may necessitate substitutions, alterations or cancellations of the speakers and/or topics. As such, IQPC reserves the right to alter or modify the advertised speakers and/or topics if necessary. Any substitutions or alterations will be updated on our web page as soon as possible.

Lodging Information: Sessions for the Conference will be held at:

The Warwick New York, 65 West 54th Street, New York, NY 10019

Telephone: 001-212-247-2700, Fax: 001-212-713-1751

Always quote booking reference GA2/IQPC conference

Overnight accommodation is not included in the registration fee. However, reduced rates have been arranged at the Warwick New York Tel: 001-212-247-2700 or fax: 001-212-713-1751. Please call the hotel direct and quote Booking Reference "GA2/IQPC conference" when booking. It is advisable to book six weeks prior to the event. After that time availability cannot be guaranteed.

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REGISTRATION

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