

BUILDING EXCELLENCE

PANEL

Dr. Harry Hertz, Director Emeritus, Baldrige Performance Excellence Program
Dr. Joseph DeFeo, CEO, Juran Institute
Shaun Barker, Associate Director, Shingo Institute

MODERATOR

Dr. Rick Edgeman, Research Director, Shingo Institute



BUILDING EXCELLENCE

Organizations are enveloped in constantly changing and increasingly challenging competitive landscapes. As means of enhancing their competitive positioning, performance, resilience, and robustness – not to mention their survivability – organizations are more and more commonly pursuing the moving target of *excellence*.

This panel addresses the pursuit of excellence as seen from the perspective of globally acknowledged authorities representing the Baldrige Performance Excellence Program and the Shingo Institute.



JOSEPH A. DEFEO, PHD

Joe is recognized as one of the world's leading experts on transformational change and breakthrough improvement. For 28 years, Dr. DeFeo has worked as a trusted adviser helping business leaders increase sales, reduce costs and improve its customer experience through the deployment of performance excellence programs.

He has ushered the Juran Institute into Juran Global to support a new age of business improvement by successfully building on universal principles pioneered by Dr. Joseph nearly 60 years ago and infusing current thinking and strategies around performance excellence and transformational change. His recent publication, *Juran's Quality Essentials for Leaders*, provides a concise message delivered for leaders to teach them how to embrace quality, not fight it, to be a globally competitive enterprise.

Dr. DeFeo has co-authored three books. The first was with Dr. Joseph M. Juran, the 6th Edition of *Juran's Quality Handbook, The Complete Guide to Performance Excellence*, the second book was with Dr. Frank Gryna, *Juran's Quality Management and Analysis, 6th Edition*, which is a university text used in many educational institutions around the world. The third was *Six Sigma Breakthrough and Beyond* with his late mentor, Dr. William Barnard.



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Experts in Quality Management, OpEx, and Lean Six Sigma

HARRY S. HERTZ, PhD

Harry has been with the National Institute of Standards and Technology since 1973, originally as a research chemist, and then in a series of management positions including director of the Chemical Science and Technology Laboratory. He served as the director of the Baldrige Performance Excellence Program from 1995 to June of 2013. He now serves as the program's director emeritus. Dr. Hertz has made presentations to a wide variety of audiences on elements of organizational excellence and change management, the Baldrige criteria for measuring performance excellence, and on healthcare quality improvement. He has been the intellectual driver behind the Baldrige Criteria for Performance Excellence and their evolving definition of performance excellence for almost 20 years.

He has a bachelor's degree in chemistry from the Polytechnic Institute of Brooklyn and a Ph.D. from the Massachusetts Institute of Technology. Following graduate school, Dr. Hertz spent two years as an Alexander von Humboldt fellow at the University of Munich. He is a fellow of the American Association for the Advancement of Science (AAAS) and an honorary fellow of the American College of Healthcare Executives. He is also an adjunct senior professorial lecturer at the American University in Washington, DC and serves on several advisory committees.



SHAUN BARKER

Shaun has been the assistant executive director for the Shingo Institute since 2001. He is responsible for such organizational operations as finance, human resources, information technology, marketing and development. He has personally participated in dozens of comprehensive site assessment visits to business and government organizations worldwide that have challenged for the Shingo Prize. He participates in the development of Shingo educational offerings and is a contributor to both the world-renowned Shingo Model and the Shingo Prize Application Guidelines – the international standard of operational excellence. Mr. Barker was also a key participant in the creation of a lean certification program sponsored by AME, SME, ASQ and the Shingo Institute.



Shaun is an engaging speaker and instructor for the Shingo Institute and trains companies on the Shingo Model and Shingo Guiding Principles, teaching how to apply principle-based leadership to their operations and to use assessment tools to foster continuous improvement in their organizations. He has delivered presentations and workshops to professionals globally, including the United States, Canada, China, Mexico and Europe.

He earned a bachelor's degree in marketing with a minor in economics from Utah State University in 1984 and an MBA with an emphasis in entrepreneurship in 1999.



SHINGO
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OUR PURPOSE: Based on timeless principles, we shape cultures that drive operational excellence.

OUR MISSION: We conduct cutting edge research, provide relevant education, perform insightful enterprise assessment, and recognize organizations committed to achieving sustainable world-class results.

MISSION: To improve the competitiveness and performance of U.S. organizations for the benefit of all U.S. residents, the Baldrige Performance Excellence Program is a customer-focused federal change agent that:

- ❖ Develops and disseminates evaluation criteria
- ❖ Manages the Malcolm Baldrige National Quality Award
- ❖ Promotes performance excellence
- ❖ Provides global leadership in the learning and sharing of successful strategies and performance practices, principles, and methodologies

CORE VALUES:

- ❖ Deliver a consistently positive customer experience
- ❖ Value and empower our workforce
- ❖ Think and act ethically
- ❖ Think and act strategically

BUILDING EXCELLENCE

1. What is your quick definition of excellence?
2. What are those things that you believe are most essential to advance enterprises in their quest for excellence?
3. How are *enterprise excellence*, *resilience* and *robustness* related to one another and are they synergistic?



PERFORMANCE EXCELLENCE

An integrated **approach** to organizational performance management that **results** in:

- delivery of ever-improving value to customers and stakeholders, contributing to organizational sustainability,
- improvement of overall organizational effectiveness and capabilities,
- organizational and personal learning.



CONTINUOUS VS. BREAKTHROUGH IMPROVEMENT

1. What is the relative importance of continuous (incremental) improvement vs. breakthrough improvement?

2. How does this tie to innovation?

INNOVATION



GRAND CHALLENGES

Humanity is faced by grand challenges on levels ranging from local to global that – generally – divide into social, ecological, and economic domains.

1. What, if any intersections do you see of these relative to enterprise excellence?
2. What do you see as the obligations of the enterprise relative to these challenges and what do you see as the benefits to the enterprise associated with embracing these challenges?
3. Based on these, what implications (if any) do you see for ... Baldrige, Shingo ... in the future?



COMPLEMENTARITIES

Given our discussion today, what synergies or complementarities do you see among Shingo, and Baldrige?



CROWDSOURCING?



CLOSING COMMENTS FROM THE PANEL





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THANK
YOU