

SIX SIGMA

in Financial Services

Conference: 8th & 9th November 2005
Workshops: 7th November



The Renaissance Hotel – ZURICH

Hear how leading European and US finance companies are utilising Six Sigma today to meet the challenges of tomorrow.

KEYNOTE PRESENTATION



Alan Goldstein
Process Strategy Advisor
CAPITAL ONE FINANCIAL USA

KEYNOTE PRESENTATION



Charles Smith
Master Black belt
CATERPILLAR FINANCIAL SWITZERLAND

4 Workshops Provide Fundamental Six Sigma Knowledge

A A-Z OF SIX SIGMA IN FINANCIAL SERVICES

led by VALEOCON

B SIX SIGMA PROJECT SELECTION FOR THE FINANCIAL SERVICES INDUSTRY

led by SIX SIGMA & LEAN MERITS

C THE POWER OF LEAN METHODS & SIX SIGMA TOOLS IN FINANCE

led by FIFTH THIRD BANK

D CULTURAL ASPECTS OF IMPLEMENTING SUCCESSFUL SIX SIGMA PROGRAMMES

led by SCOTTISH WIDOWS

Case Studies from:

IXPERION is delighted to announce featured keynote speaker

Johan Bertrands
CEO
SWISS LIFE



Dr Christoph Rauscher

IT Leader P&C Europe
GE FRANKONA, GERMANY

Charles Smith

Master Black Belt
CATERPILLAR FINANCIAL, SWITZERLAND

Balbina Sostak

Deployment Leader
SKANDIA, GERMANY

Alan Goldstein

Process Strategy Advisor
CAPITAL ONE FINANCIAL, USA

Joe Gilmartin

Process Support Manager
SCOTTISH WIDOWS, UK

Iain McKinven

Senior Manager Business Improvement
SCOTTISH WIDOWS, UK

Philippa Gunter

Power of Process Regional Lead
UBS INVESTMENT BANK, SWITZERLAND

Simon Smith

Simplification Leader for Europe
GE CONSUMER FINANCE, UK

Ingo Gefeke

Global Chief Administrative Officer
Deutsche Asset Management
DEUTSCHE BANK, USA

Mr Alexander Fleischmann

Managing Director
RAIFFEISEN INTERNATIONAL, AUSTRIA

Christine Theodorovics

Head Group Quality Management
SWISS LIFE (Zurich), SWITZERLAND

Scott Enders

Vice President Process Improvement
FIFTH THIRD BANK, USA

Michael-A. von Hirsch

Sr Manager Six Sigma Deployment
TOSHIBA, GERMANY

Harold Ruvoldt

Partner in Charge, New York
EDWARDS & ANGELL, USA

Mathew Estep

Manager Performance Excellence
CORNING INCORPORATED, USA

Cranston Darris

Director of Quality, Six Sigma Programme
PITNEY BOWES, USA

Andy Carter

Programme Manager
European Business Transformation
PITNEY BOWES, USA

Merel Ritsma

Managing Director
SIX SIGMA & LEAN MERITS, NETHERLANDS

Steven E Crom

Managing Partner
VALEOCON, GERMANY

Massimo Appiotti

Partner & Director
Financial Services Practice
VALEOCON, ITALY

Roberto Copercini

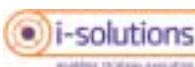
Senior Associate
& Director Financial Services Switzerland
VALEOCON, SWITZERLAND



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FREE Six Sigma Memory Jogger to all delegates



Six Sigma in Financial Services

Choose from two presentation tracks - **DISCOVERY** and **TECHNICAL**
AND from three streams - **COST REDUCTION**, **RISK MANAGEMENT** and **SERVICE ENHANCEMENT**

Welcome from the Chairman

This conference is designed for chief operating executives looking for innovative ways to address the challenges faced by the financial services industry today. The volatility in the equity markets has exposed the need for better operational efficiency. Risk management now has a direct bearing on capital reserves and the cost of doing business. Meanwhile, there is increasing competition from non-traditional financial service providers who are capitalizing on their customer connections. All of the above calls for innovative products and improved service while simultaneously reducing costs and risks. These are the major themes addressed in this year's conference.

Leading financial institutions like GE Consumer Finance, Deutsche Bank and Capital One have shown that Six Sigma can bring cultural and operational breakthroughs to lease lending, banking and insurance processes. Participants will hear directly from these pioneers in the industry.

Those participating in this conference will leave with ideas they can apply right away to on-going improvement initiatives. For those considering launching or accelerating their Six Sigma efforts, you can benefit from the lessons learnt in successfully adapting Six Sigma to European financial services businesses and cultures. Above all, this is your opportunity to be a part of the fast growing community of European Financial Services Six Sigma practitioners.

We hope to see you in Zurich.

Steven E Crom
Managing Partner
VALEOCON MANAGEMENT CONSULTING



Testimonials from delegates at past IXPERION Financial Services Conferences:

"Very informative conference, broad range of speakers, business and markets. Excellent Chairmanship."

GE Consumer Finance

"A variety of presentations and presenters. Good to have a mixture of companies."

JP Morgan Chase

"Relevant business topics, knowledgeable presenters."

American Express

"Very effective speakers. Opportunities to network with those with successful deployments."

US Bank

"The interaction among the group was good. Facilitators did a good job of creating, encouraging and acknowledging interaction."

Clarke American

**Register before 14th October
and save up to €500!**

Welcome to ZURICH Europe's Financial Centre

Join us in Zurich for
Six Sigma in Financial Services 2005



Zurich has long been recognised as the banking capital of Europe, yet less is known about this city's more hidden delights.

In recent years Zurich has witnessed a creative explosion. Whilst in this fascinating city, why not take time to visit some of the innovative cafes, museums, galleries and restaurants on offer. To relax, you may be tempted to enjoy a picturesque lakeside walk.

Six Sigma in Financial Services will be held at the
Renaissance Zurich Hotel.

To take advantage of the discounted accommodation rates available at the Renaissance call +41 1 874 50 00 quoting **IXPERION.**



About Our Sponsors: Valeocon

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MANAGEMENT CONSULTING



Valeocon – Direct the Power. We concentrate on helping clients achieve

lasting business results. To determine what business results are most meaningful, we help clients formulate and implement business strategies. To achieve business results, we help clients change the way work gets done – drawing on our process excellence experience. To ensure the results achieved are lasting, we help build the client's capability to manage change and continuously improve – enabling people to develop and realise more of their full potential. A common element in all of the above is the question, "how to create greater value for/with customers?" We help clients bring the voice of their customers into decisions regarding strategy, process improvement and organisation 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 organisation as a whole.

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Six Sigma Workshops: Monday 7th November 2005

Pre-Conference Workshops: Monday 7th November 2005

A-Z of Six Sigma in Financial Services - From Strategy to Execution

Workshop A: 9:00 - 16:00

Six Sigma deployment in the manufacturing sector has always had the product and its supply chain as the main driver for management attention and effort. In the Service environment, and more importantly in the Financial Services industry, the main element of management focus should be the Process itself (and related people behaviour). This relentless focus on managing processes has led top financial service institutions to improve competitiveness by delivering better customer experience, productivity and risk. During this workshop you will learn how to derive your Six Sigma deployment from the business strategy:

- Brief history and evolution of Six Sigma
- Zero level: Let's agree on vocabulary
- Business Strategy and Six Sigma deployment: How to align Six Sigma goals to strategy
- Process Management: Ownership of the performance
- Process Improvement: Project selection and execution
- Process Goal and People Performance: Involving the Human Resources department first
- The Deployment Dashboard - how to measure success

- The organisational structure - roles and responsibilities
 - Examples of latest application
- Attendees will have the opportunity to share their experiences and learn from others tackling these and related challenges. From this session you will take away the tools, techniques and understandings your company needs to achieve and maintain Six Sigma success.

Facilitator: Roberto Copercini
Director Financial Services Switzerland
VALEOCON MANAGEMENT CONSULTING
 Roberto, former Director for Strategy and Six Sigma at Merrill Lynch Bank (Suisse) and COO and Quality Leader at GE Capital, is a recognised thought leader in creating competitive advantages with the alignment of Six Sigma to business strategy.



Six Sigma Project Selection for Financial Services

Workshop B: 8:00 - 11:00

Project selection touches all aspects of your Six Sigma deployment: people, skills and results. Working on the right projects will energise all stakeholders, from your customers to the project team, the employees and senior management. It can help ensure long term sustainable success. Poor initial project selection will most likely result in confusion, or even frustration, seriously jeopardising the overall Six Sigma efforts.

This workshop will focus on the criteria for selecting the right project areas:

- Which can be directly linked to your business strategy
- Which frustrate your customers and employees the most
- Which early wins provide proof of concept and drive enthusiasm

Through her wealth of experience at GE Capital, P&G, ING, Swiss Life and Philips, Merel Ritsma will reveal how to identify the right projects in Financial Services and how to customise your Six Sigma toolset successfully to this environment.

Facilitator: Merel Ritsma
Managing Director
SIX SIGMA & LEAN MERITS



Merel is an energetic and pragmatic trainer and consultant with an international track record in Lean Six Sigma and Change Management. She started her career at Procter & Gamble at their European headquarters, working on a variety of financial assignments. She then joined General Electric as part of their internal consulting group. Upon certifying as Six Sigma Master Black Belt, she returned to the Netherlands to become Operations Director at GE Capital. As GE improvement leader, Merel trained over 150 Black and Green Belts and led 350 Six Sigma and Lean projects. She is a certified GE Change Acceleration Program (CAP) Coach. In August 2004, she founded Six Sigma & Lean MERITS, which supports European companies in their Operational Excellence initiatives.



The Power of Lean Methods & Six Sigma Tools in Finance

Workshop C: 11:30 - 14:30

There has been much written about the power of Lean in reducing waste and the power of Six Sigma to eliminate variation in a process. The real power of Lean and Six Sigma is when they are used together to achieve the maximum impact upon a business process in the shortest amount of time. This interactive workshop will provide you with the foundations you need to get a head start in one of the most lucrative business sectors. In this lively tutorial you will:

- Ascertain how to reduce cost, improve quality and increase customer service levels in all transactional areas of your organisation
- Maximise your Return on Investment with the synergy of Lean and Six Sigma
- Master the challenges of cross-functional implementation
- Get the right strategy to deal with issues surrounding intangibles

Facilitator: Scott Enders
Vice President, Process Improvement
FIFTH THIRD BANK



Scott is the Quality Leader for Fifth Third Bancorp, a diversified financial services company headquartered in Cincinnati, Ohio. The Company has \$94.5 billion in assets, operates 17 affiliates with 1,090 full-service Banking Centres and sits as the 10th largest financial institution in the country. Scott's Quality team at Fifth Third includes Master Black Belts, Black Belts and Green Belts. Scott has served as the Quality Leader at Fifth Third Bank for nearly two years.



Cultural Aspects of Implementing Successful Six Sigma Programmes

Workshop D: 15:00 - 18:00

This interactive and highly action-oriented workshop will aim to help participants explore the cultural aspects of implementing successful Six Sigma programmes. In particular it aims to develop an understanding of challenges around detailed execution in practice, and to broaden collective perspectives on the wider cultural aspects of change. Working in groups, the primary objective will be to learn from each others' experiences. The group will collectively generate a range of alternative approaches and pragmatic ideas for delivering and representing results in a way that is accessible to non-practitioners.

The process and the outputs of this session will not be prescriptive in nature. Rather, a heuristic approach will be adopted, and the facilitators will aim to adapt the workshop approach and structure to suit the emerging requirements and interests of the participants. The facilitators will share deliverables and insights which they have found useful in dealing with the challenges of implementing an integrative approach to continuous improvement programmes.

Facilitators: Joe Gilmartin
Process Support Manager
SCOTTISH WIDOWS



Joe is an experienced change manager, particularly skilled in process management and development. He is also experienced in applying structured approaches to facilitate change across organisational boundaries. Joe's operational management experience began in South Africa where he was employed by Standard Bank. Process, Continuous Improvement and breaking down functional silos have been recurrent themes in his career to date.

Iain McInven
Senior Manager Business Improvement
SCOTTISH WIDOWS



Iain is responsible for Scottish Widows Voice of the Customer (VOC) team, focused on ensuring existing means of customer feedback are fully quantifiable and actionable, while increasingly generating fresh perspectives on customer experience to drive tangible improvements. Iain has contributed to strategic and operational successes within and across many divisions and business units, mainly within major Financial Services institutions.



EARLY BIRD DISCOUNT Register by 14th October and save up to €500

Six Sigma in Financial Services

First Day: Tuesday 8th November 2005

Choose from two Streams of presentations, specially created to ensure that you and your company gain optimum benefits from this two-day conference.

Stream A is a **DISCOVERY TRACK** and has been specifically developed for those on a path-finding mission, or in the early stages of their Six Sigma journey. These presentations provide the knowledge necessary to ensure Six Sigma success within your company.

Stream B's topics have been carefully selected for the **TECHNICAL TRACK** and adapted for the more experienced. These in-depth presentations, from Six Sigma leaders, will provide you with valuable insights and knowledge that your company cannot afford to miss.

8:00 Registration and Coffee



9:00 Chairman's Opening Remarks
Steven E. Crom, Managing Partner
VALEOCON MANAGEMENT CONSULTING



RISK MANAGEMENT

KEYNOTE PRESENTATION

9:15 Six Sigma as a Strategy for Managing Operational Risk

It's imperative for financial institutions today to understand and manage risk for their own commercial benefit as well as to be compliant with regulatory requirements. Loss or Near Loss can be the focal point for a Six Sigma initiative. This provides insights for reducing process variability, and therefore risk. Steve will give examples of specific deployment strategies to support risk management in banking, insurance and other relevant financial operations.

Steven E Crom, Managing Partner
VALEOCON MANAGEMENT CONSULTING

SERVICE ENHANCEMENT

KEYNOTE PRESENTATION

10:00 Review of 5 Years Six Sigma Implementation at GE Frankona Management Service GmbH

General Electric has become the standard bearer for power-driven Six Sigma implementation in all business areas, and have elevated Six Sigma to 'the greatest fulfilment engine ever devised'. Dr Christoph Rauscher will give an overview of GE Frankona's roadmap to performance improvement and to product quality of the highest level.

- Quality Management vs Process Management at GE Frankona
- How to implement Six Sigma - project selection in an insurance company, training issues, data acquisition
- Lessons learnt after of 5 years on the road to lasting Six Sigma results
- How to maintain the drive for improvement after the initial enthusiasm is fading out

Dr Christoph Rauscher, IT Leader P&C Europe
GE FRANKONA MANAGEMENT SERVICE GmbH

11:00 Networking Morning Coffee Break

COST REDUCTION

11:30 Utilising Six Sigma within a Company's Finance Function and Resulting Benefits

Corning Incorporated is a diversified technology company, focusing on high-impact growth opportunities in the telecommunications, and semiconductor industries. Through first hand examples, Matthew will demonstrate how a non-financial services company, such as Corning Incorporated, can apply Six Sigma techniques its finance functions, and the substantial savings that are realised as a result.

- Key elements of an implementation strategy
- Implementation pitfalls to avoid
- Tangible benefits of implementing Six Sigma within finance and accounting

Matthew Estep
Manager Performance Excellence
CORNING INCORPORATED



SERVICE ENHANCEMENT

12:15 How to Define a Six Sigma Benefit - Control Function and Process Infrastructure

After the initial phases of process selection and Six Sigma training, what are the palpable and long-term benefits of a Six Sigma roadmap after the low-hanging fruits are picked? Balbina will review critical issues after 2 years of Six Sigma rollout at Skandia Versicherung in Berlin.

- The necessity of a "cockpit" to monitor Six Sigma progress
- Preventing Six Sigma from becoming 'old hat' and keeping the quality momentum at its highest level
- How Six Sigma has changed Skandia, and how Skandia has changed Six Sigma

Balbina Sostak, Deployment Leader
SKANDIA VERSICHERUNGEN



13:00 Luncheon

Discovery Track

SERVICE ENHANCEMENT & RISK MANAGEMENT

DOUBLE KEYNOTE PRESENTATION

14:30 Six Sigma at Swiss Life: Driving Customer and IT Services

Customer focus and efficiency are important objectives for Swiss Life. In order to obtain a sustainable solution of long term process design, the Six Sigma methodology is being applied. Discover how:

- Swiss Life enable people to take care of customers' needs and select data driven reasons for improvement, whilst involving the team directly in the solution decision process
- Swiss Life organise training and implement processes
- The pilot project performed

These issues will be discussed, focusing on two points:

1. How was the Swiss Life roll-out in Belgium managed and how were projects chosen and coordinated?
2. Case study of a pilot project in Swiss Life Switzerland: How to improve internal IT services (IT-Helpdesk) with the help of Six Sigma.

- How did the project start?
- Pitfalls and findings during DMAIC
- Data collection
- Communication in the organisation during & after the project
- Presentation of results
- Next steps and projects

Johan Bertrands
Chief Executive Officer
SWISS LIFE (Belgium)
Christine Theodorovics
Head Group Quality Management
SWISS LIFE (Zurich)



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Six Sigma in Financial Services

First Day: Tuesday 8th November 2005

Technical Track

SERVICE ENHANCEMENT

14:30 Harnessing Synergies Between Lean and Six Sigma to Drive Increasing Customer Satisfaction in an Integrated Approach

In this session, delegates will hear a practitioner's experience of harnessing synergies between Lean and Sigma in an integrative approach to continuous improvement. Joe and Iain will also explain how Voice of the Customer (VOC) has become an integral part, not just of their processes, but also an organisational culture change proposition. This will cover, inter alia, creating a VOC team to support process improvement and establishing a proactive, multi-faceted business improvement environment.

Joe Gilmartin, Process Support Manager
SCOTTISH WIDOWS
Iain McKinven
Senior Manager Business Improvement
SCOTTISH WIDOWS



Technical Track

COST REDUCTION

15:15 Enhancement of Quality Tools - Aligning Six Sigma and the Balanced Scorecard in Finance Departments

More often than not, Six Sigma is not the only Quality Initiative supporting a Finance Department's performance. Aligning the Balanced Scorecard with the Six Sigma toolbox will help you to fine tune the focus on most critical business issues. Michael's case study shows the alliance of Six Sigma tools with the Balanced Scorecard in Toshiba's Finance section.

- How to get started and keep the initiative going
- How to identify performance gaps in existing processes
- Evaluating joint teams in cross-functional projects

Michael-A. von Hirsch
Sr Manager
Six Sigma Deployment
TOSHIBA



16:00 Networking Coffee Break

Discovery Track

COST REDUCTION

16:15 Utilising Six Sigma to Drive Process Excellence Across a Global Investment Bank

Six Sigma is playing a key role in UBS Investment Bank's process excellence journey. Philippa Gunter will give valuable insights into how UBS' Process Excellence strategy is enabling the company's global operations to simultaneously deliver a differentiated client service and to increase business benefits. Further more, this presentation will detail the deployment approach selected by UBS and lessons learnt so far.

- Developments in process excellence
- Deploying a process excellence programme tailored to the business' needs
- Selecting the right approach for the job: Six Sigma, Lean, Kaizen et al
- Lessons learnt after almost two years

Philippa Gunter
Power of Process Regional Lead
UBS INVESTMENT BANK

Technical Track

RISK MANAGEMENT

16:15 Six Sigma at Raiffeisen International Bank-Holding AG

Today's customers demand a consistently positive service experience - accurate, friendly and fast - every time. Six Sigma's place within the banking sector has long been accepted. During the past 10 years, retail banks have turned to Six Sigma to improve service delivery and boost earnings. Successful training, project selection, data mining and drawing the right conclusions from lessons learnt are crucial for achieving and maintaining Six Sigma results. Alexander Fleischmann will detail the journey to quality improvement taken by the Raiffeisen banking organisation, and the results achieved so far.

Alexander Fleischmann
Managing Director
RAIFFEISEN INTERNATIONAL

COST REDUCTION

17:00 Six Sigma For Services: Bringing Excellence to all Aspects of Business

Although Six Sigma's historical roots are in manufacturing, recent studies and reports have shown that many companies that invest in Six Sigma within their service functions are saving millions of dollars per project. This case study from a full-service law firm will: Enable participants to recognise that Six Sigma is in fact applicable to non-traditional process areas:

- Train participants to identify those areas where Six Sigma has not been applied but to which its application will reap benefits
- Teach how to design Six Sigma programs as applied to services rendered by outside vendors
- Train participants how to impel outside vendors to be Six Sigma compliant


At the end of this session you will leave with pragmatic tips as well as references to other sources on how to accelerate Six Sigma results in your financial services organisation.

Harold Ruvoldt
Partner in Charge New York
EDWARDS & ANGELL



17:45 Chairman's Closing Remarks





19:00

NETWORKING DINNER

All conference participants are invited to a complimentary three course networking dinner. Relax and unwind with your colleagues in an informal environment.

Register before 14th October
and save up to €500!

CONFERENCE DAY 1: Tuesday 8th November 2005

Six Sigma in Financial Services

Second Day: Wednesday 9th November 2005

8:00 Registration and Coffee



9:00 Chairman's Opening Remarks

A short summary with the key points of Tuesday's presentations will proceed today's sessions.

Massimo Appiotti
Partner & Director Financial Services Practice



VALEOCON MANAGEMENT CONSULTING

COST REDUCTION & RISK MANAGEMENT KEYNOTE PRESENTATION

9:15 Integrating Six Sigma with Strategy and Global Process Management

Six Sigma is a powerful management tool. It identifies and eliminates waste and inefficiencies across the organisation, but this is only part of the power of Six Sigma. When implemented as a tool to drive strategic planning, integrated with a global continuous improvement effort, it has even greater potential. It is more than a statistical device to drive out cost. Six Sigma can be used as a forward-looking methodology to drive strategy and cascade it across the organisation.

This presentation will show how Caterpillar Financial has leveraged its Six Sigma programme, and how the company's quest for continuous process improvement has led to winning the prestigious Malcolm Baldrige Award, the highest quality award in the United States. What is business excellence and why does it matter? How did Six Sigma facilitate the quest for continuous improvement? How do you integrate Six Sigma into your strategic planning process? What is process certification and what role does Six Sigma play? How can you use Scorecards to cascade strategy? How do you leverage your Master Black Belt and Black Belt resources? What is the bottom-line impact?

- Defining Business Excellence
- Building an integrated system for excellence
- Using Six Sigma to power the Strategic Planning Process and Continuous Improvement Process

■ Determining and measuring payback

Charles Smith
Master Black Belt

CATERPILLAR FINANCIAL



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Why you should attend IXPERION's 2nd European Conference Six Sigma in Financial Services

The revolution continues. An ever-growing and nationwide audience of consumers is becoming increasingly aware of the quality of service they receive, giving it enlarged value and power in the marketplace. This is especially true in the insurance/financial services industry where the relationship between the buyer and seller is still largely marked by sustained, personal contact. **Consumers are becoming highly critical of any companies and agencies whose quality and service standards fall below their expectations.** In answer, many members of the insurance/financial services community have taken steps to provide quality services, but some, if not most, continue to stumble and haven't met the challenge. Some sacrifice customer experience for efficiency sake.

The good news is that the methods leading to cost-effective and consistent excellent service can be found through a management approach known as **Six Sigma**. Unlike many management practices whose effectiveness can't be measured for quite awhile, Six Sigma successes are quickly evident, measured in months.

This is an approach whose time has come. Six Sigma is helping its adopters in insurance/financial services successfully streamline processes, increase quality and accelerate growth. The results are impressive in an industry where consolidation continues and where companies cope with changes in markets and product lines and face increased competition from a variety of new sources, including global forces.

Companies with significant experience in quality and productivity improvement have found Six Sigma to be the next logical step in their ongoing efforts to provide superior service. Yet, even for companies and agencies less skilled at quality management, Six Sigma provides the means to develop a stronger process and customer focus and, in so doing, adds rigor to quality initiatives.

Some contend that Six Sigma won't work in industries such as insurance and banking because they are highly regulated and deal with financial risk. These are complicating factors that may limit the kinds of changes insurance/financial services providers can make. However, they are not impediments to improvement. Some financial services companies now apply the Six Sigma toolkit to streamline mortgage applications, process error free lockbox payments, provide more accurate investor reports and reduce turnaround time.

Companies and agencies that routinely apply Six Sigma methods are likely to experience significant benefits beyond such quick win process improvements. They can because this management approach promotes new ways of thinking and therefore drives operations to ever-higher levels of effectiveness and efficiency.

Consumers want, and have every right to receive, quality service. The Six Sigma approach can assure that an organisation will be able to furnish top-notch service on a consistent and admirable basis.

John A. Uzzi of Valeocon Management Consulting
Dennis Attenello of Attenello & Associates Inc
www.insurancejournal.com

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Six Sigma in Financial Services

Second Day: Wednesday 9th November 2005

RISK MANAGEMENT

10:00 Successfully Optimising a Company's Outsourced Processes with Six Sigma

Within Europe and the USA, an increasing number of financial services companies are concentrating on design, and outsourcing more and more of their processes to external providers. As an organisation's image is so very often dependant upon its suppliers' performance, it is vital that this is carried out effectively and efficiently. For many organisations however, the dilemma of how to optimise processes after an outsourcing has occurred, is a difficult one. Ingo Gefeke, through the use of a first hand post-outsourcing example, will examine:

- Assessing the need for Six Sigma within a BPO relationship
- Determining process performance across company boundaries
- Options in establishing process discipline across the value chain
- Re-setting service provider-to-client responsibilities.

Ingo Gefeke, Global Chief Administrative Officer, Deutsche Asset Management DEUTSCHE BANK

10:45 Ask the Experts Question and Answer Panel

Your opportunity to pose questions to some of the Financial Services Industry's Six Sigma leaders. Amongst the topics to be discussed: How can Six Sigma help support Basel II compliance? Where next for Six Sigma in Financial Services?

**Led by Scott Enders
Vice President Process Improvement
FIFTH THIRD BANK**



11:30 Networking Coffee Break

Discovery Track 11:45 Defining Six Sigma Roles That Make Sense For Processes in the Financial Environment

There is a wide range of Six Sigma deployment strategies and practices that impact upon Six Sigma roles. Six Sigma teams have to decide whether to utilise Black Belts, Green Belts or Yellow Belts, full time or part time roles, and how much time should be dedicated to Six Sigma training. All of this depends on what you hope to achieve. This session will help organise your thinking on Six Sigma roles in your organisation and will also cover other related Six Sigma deployment issues:

- Determining if your company is ready for Six Sigma
- Engaging and committing company leaders and managers
- Understanding your company's reasons for starting the Six Sigma journey
- Defining Six Sigma roles to address your current needs first
- Planning for a Point of Arrival

**Cranston Darris
Director of Quality Six Sigma Programme
PITNEY BOWES**

**Andy Carter
Programme Manager**

**European Business Transformation
PITNEY BOWES**



Technical Track SERVICE ENHANCEMENT

11:45 Integrating BPM Strategies after 18 Months of Lean Six Sigma Deployment in Banking

By understanding the key business processes a company uses to meet the needs of their customers, the gap between customer expectations and the company's ability to perform become apparent. Hear from Scott Enders how BPM strategies are helping Fifth Third Bank lead the way in customer service and how these strategies can be implemented to work in alignment with a company's Lean processes.

**Scott Enders
VP, Process Improvement
FIFTH THIRD BANK**



Discovery Track 12:30 Changing the Culture of a Financial Services Organisation

This presentation provides delegates with the opportunity to hear and learn from GE, one of the world's most experienced organisations in quality principals. GE Consumer Finance, a unit of the General Electric Company, is a provider of financial services to consumers and retailers in 47 countries around the world. Drawing on Simon's vast experience in the finance sector, this presentation examines how a financial services company can, through the use of various quality approaches, turn its culture around.

**Simon Smith, Simplification Leader for Europe
GE CONSUMER FINANCE**

Technical Track SERVICE ENHANCEMENT

KEYNOTE PRESENTATION 12:30 Using Six Sigma to Achieve Breakthrough Improvements in IT Service Management Processes

Have you ever asked yourself the question, "When is my process complete?" Process improvements are a continuous cycle of monitoring and improving to consistently meet customer demands while maintaining service levels. In this session, Alan will explain how Capital One has utilised Six Sigma tools to solve customer facing operational issues enabling IT to be a more effective service provider across the organisation.

**Alan Goldstein
Process Strategy Advisor
CAPITAL ONE FINANCIAL**



13:15 Closing Presentation

This brief summary gives all delegates the opportunity to join together at the end of the final conference day. Whether you attended presentations of the Technical or the Discovery Track, or a selection of both, this session provides a comprehensive round up of the major Six Sigma strategies implemented in the financial industry to secure significant benefits beyond quick win process improvements.

**Massimo Appiotti
Partner & Director Financial Services Practice
VALEOCON MANAGEMENT CONSULTING**



13:30 Luncheon



CONFERENCE DAY 2: Wednesday 9th November 2005

Booking form and administrative details

DATES

Workshops

Monday 7th November 2005

Conference

Tuesday 8th November 2005
Wednesday 9th November 2005

VENUE

Renaissance Zurich Hotel

Talackerstrasse 1
Zurich-Glattbrugg
8152 Switzerland
Phone +41 1 874 5000
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FEES

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<input type="checkbox"/> Workshop A only	€800
<input type="checkbox"/> EARLY BIRD	€700
<input type="checkbox"/> 1 Workshop <input type="checkbox"/> B or <input type="checkbox"/> C or <input type="checkbox"/> D	€600
<input type="checkbox"/> EARLY BIRD	€500
<input type="checkbox"/> 2 Workshops <input type="checkbox"/> B or <input type="checkbox"/> C or <input type="checkbox"/> D	€1200
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* Rates marked with an asterisk include entry to Dinner Function on Tuesday evening

Team Discounts: A 15% discount is available for groups of 3+, groups of 5+ receive 20% discount, and groups of 7+ receive a 30% discount when registering from the same organisation at the same time. Group bookings and Early Bird discounts do NOT accumulate.

Payment: Payments may be made by credit card, cheque or bank transfer. A process charge of 4.75% will be added to your credit card bill. Payment must be made prior to the event. The organisers reserve the right to refuse admission if payment has not been received. IXPERION cannot be held liable for non-arrival of registration information. All invoices and registrations processed must be honoured in full, unless cancellation has been received under the terms stated in the cancellation section. Payment includes lunches, refreshments, conference workbook and all meeting materials.

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Please contact us at IXPERION prior to the conference if you have any additional requirements e.g. wheelchair access, large print, special dietary requirements etc.

Enquiries: By telephone to Katherine on +44 1603 283 596 or by email: ks@ixperion.com

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Four easy ways to register

1



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I am unable to attend but please send me _____ copies of the conference documentation at €560 each (plus VAT and P&P) or £399 (plus VAT and P&P). Payment must be received before dispatch.

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Keep these dates free in your calendar

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Transform business processes to increase profitability and to ensure success with Six Sigma tools in all Chemical and Pharmaceutical operations. Presentations and case studies from American and European deployment leaders will demonstrate why Six Sigma is becoming THE legitimate way to meet current business pressures whilst reporting dramatic monetary gains.

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INTERNATIONAL WORKSHOP DESIGN FOR SIX SIGMA SPECIAL EVENT - GLASGOW, 12 & 13 SEPTEMBER 2005.

This two-day event will focus on 10 workshops from DFSS pioneers around the world. Learn from, network with and benchmark against companies who have been successful in DFSS initiatives

Register for this event now!!

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Discover how industry leaders have implemented Lean & Six Sigma to drastically improve their performance. Discuss the tried & tested methods provided in 12 workshops on the powerful synergy of Lean Principles and Six Sigma Tools over these two days in Amsterdam.

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