



# Institute for Supply Management<sup>™</sup>

## **Manage...Lead...Transform: What You Need to Know to be Effective**

**October 13, 2011**

### **Program Handbook**



# **The Institute for Supply Management™ welcomes you to this Satellite Seminar broadcast!**

**Thank you for participating in this Satellite Seminar. We hope you find today's session to be a rewarding educational experience.**

**All materials contained in this *Program Handbook* are the property of ISM. Members of our seminar panel may have provided additional information and materials for your use. Please make sure that the proper source is credited if you use these materials when you return to your organization.**

The statements and opinions expressed by the panelists in this program are solely those of the individuals and are not necessarily endorsed by ISM.

This program is designed to provide information relating to management and leadership. It is provided for education purposes only.

ISM is not engaged in rendering legal services, advice or opinions. If legal advice or other expert assistance is required, the services of a qualified professional should be sought.

## ***PLEASE GIVE US YOUR FEEDBACK!***

**We are interested in your opinions on how valuable this program is for you. Please remember to complete the program evaluation for today's program online via the ISM**

**Web site at:**

**[www.ism.ws/surveys/index.cfm?SurveyID=1187](http://www.ism.ws/surveys/index.cfm?SurveyID=1187)**

**Or simply visit the ISM Web site at [www.ism.ws](http://www.ism.ws) and enter QS190 in the Quick Search box at the top of our home page.**

**This feedback form will be available until November 1, 2011. We are looking forward to receiving your comments.**

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Permission is hereby granted for downlink site coordinators to make enough copies of this *Program Handbook* for all participants at their downlink site. The licensing agreement for this program allows downlink sites to make one video recording of the satellite seminar — as it is being transmitted live — for use solely by the licensed organization for educational purposes for the life of the recorded copy. The satellite seminar may not be edited or altered. The video may be used strictly for educational activities, and may not be distributed to individuals.

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- ISM official position statements:
  - “Supply Management Input Critical to Business Success”
  - “Supply Management Knowledge and Skills Critical for Preparing Future Business Leaders”
- ISM Principles and Standards of Ethical Supply Management Conduct
- For supplemental articles related to this program, visit the ISM website at <http://www.ism.ws/education/SatSemDetail.cfm?ItemNumber=21498>

# **SECTION 1:**

## **BACKGROUND INFORMATION**

## **Manage...Lead...Transform: What You Need to Know to be Effective**

In today's marketplace, supply professionals are required to be project managers and are faced with constantly changing roles. What are the necessary transformation and management skills to be effective? What leadership skills are essential in working with your supply organization? This program focuses on the skills and tools that will strengthen these roles.

**Who should attend?** This satellite seminar is geared for supply professionals, at all levels, who are interested in developing/strengthening their leadership, management and transformation skills. Individuals with responsibilities in other areas of the organization may also be interested in this topic.

### **Program Outline**

*Note: The following outline is subject to change prior to the broadcast.*

#### **Segment 1: Overview: The Challenges We Face Today**

- Managing vs. Leading – What is the Difference?
- Supply Management Leadership
- Employee Engagement
- Driving and Sustaining High Performance

#### **Segment 2: Managing Yourself and Others**

- Value and Goal Alignment
- Supply Manager's Skillsets
- Managing Supplier Relationships
- Feedback and Communication
- Driving Performance

#### **Segment 3: Leading in Supply Management, Across the Enterprise and Into the Community**

- Why Leadership Matters
- Leadership Competencies
- Leadership Dimensions
- Creativity and Innovation

#### **Segment 4 - Transformation**

- What is Change Management?
- Change in Today's Work Environment
- Virtual Teams and Meetings
- Transformation Steps
- Navigating Complexity
- Staying Engaged, Informed, Charged

## Panelists

**Nancy Q. Smith** is Director, Strategic Partnering, for Exemplary Performance (EP), a leading performance alignment and execution firm serving some of the world's most successful companies. EP's results are evidenced in increased margins, faster time to performance, reduced turnover, and increased close rate. In her role, Nancy works with HR, supply management and other enabling functions to help them transition from a tactical to a strategic approach and builds the capability of their teams to serve as strategic business partners and deliver results to the business.

Prior to joining EP in 2007, Nancy served as people development and global process manager for Delphi Corporation. As a people development manager she built and managed the execution of development strategy for 2,700 employees across 38 countries. This included development of process support strategies, coaching structures and learning and development programs. As global business process manager, she was actively involved in reorganization, supplier support and crisis resolution. She improved business processes, led the roles, decision rights and metrics process and created the learning, development and coaching strategy to deepen internal client partnerships to align with strategic business goals. Prior to 2002, Nancy held positions of increasing responsibility within the PACE organization.

Nancy is a featured speaker for supply management and human resources audiences. Together with Dave Nelson, she authored *CPO Perspective on Strategic Business Partnerships*, a whitepaper featuring 15 top CPOs. Nancy was also recently published in *Training* magazine.

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### Panelists:

**Bradley Holcomb, CPSM, CPSD** is Chair of the Institute for Supply Management™ Manufacturing Business Survey Committee. In this role, he writes the ISM Manufacturing Report On Business® based on the survey results of approximately 350 supply management professionals across 18 different industry sectors. The Report On Business® is released on the first business day of each month, and features the PMI Index as its key measure.

Brad's specialties are in the areas of procurement, supply management, business transformation, staff development, and mentoring. His mission has always been to build high-performance teams and broaden the role of procurement to substantially reduce costs and create a competitive advantage. He has held executive-level procurement and supply management positions at Dean Foods Company, Royal Group Technologies, Waste Management, American Precision Industries and Praxair. Brad's earlier career was with Eastman Kodak Company where he held a broad range of management positions over a 20-year period. In his last assignment at Kodak, he led the project that globalized procurement through the development and implementation of worldwide processes and best practices. Based on this valuable experience, Brad went on to become Chief Procurement Officer and lead successful transformations at five companies over the course of the next 15 years.

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**Linda K. Lundquist, MBA, CSCP, PMP, PHR, RCC** is manager of Supply Chain Processes & Optimization at Caterpillar. She manages an internal consulting group in Caterpillar Production System team to drive ERP systems excellence in supply chain and manufacturing processes and optimization of business transformation results globally. From 2003 to 2008, Linda was Employee Development Program Manager at Delphi Corporation in Global Supply Management. In this role, Linda supported functional objectives such as redesign of global category strategy development and sourcing, defining new process to classify suppliers and manage supplier relationships and restructuring Indirect Materials organization including development of tools for strategic sourcing process and eRFQ. Prior to joining Delphi, Linda was

employed at John Deere, where she spent more than 10 years in Supply Management as a Project Manager for initiatives in supplier training, performance management, workforce management, succession planning, talent management and key leadership talent development.

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**Wayne Turmel** is the CEO and founder of Great Web Meetings, a consultancy focused on helping companies present, sell, and manage their teams and communicate over the web. He is obsessed with helping people communicate virtually. As president of GreatWebMeetings.com he helps companies and individuals use today's virtual communication technology. His clients include The American Red Cross and WeightWatchers. He's the author of several books including *10 Steps to Successful Virtual Presentations* and *6 Weeks to a Great Webinar*, is a regular blogger on theconnectedmanager.com and is the host of one of the world's most successful podcasts, "The Cranky Middle Manager Show." He lives in Glen Ellyn, IL with his wife Joan, daughter Nora, and Byron, the Demented Cockatiel.

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### If you are working on your CPSM<sup>®</sup> qualification...

..please note that the content of this program relates to the specifications for CPSM<sup>®</sup> Exam 3, area 3-A on Leadership.



#### 3-A. Leadership

3-A-1	Represent the supply management organization in decisions related to the organization-wide or project objective setting, budgeting, staffing and policies.
3-A-2	Develop and implement business plans that will meet customer service, corporate profit and return on equity goals.
3-A-3	Develop, implement and monitor a strategic supply management plan and operating plan based on market conditions, business needs and available resources.
3-A-4	Plan/develop/provide operating policies, guidelines and procedures. Modify as necessary in order to achieve the optimal structure.
3-A-5	Develop/implement changes to the organization's supply management policies as needed.
3-A-6	Participate in company acquisitions and/or mergers and/or divestitures to assure the continuity of supply and capture synergy opportunities.
3-A-7	Represent the supply organization in meetings with corporations, government agencies, professional associations and other organizations.
3-A-8	Lead or participate in cross-functional and/or multifunctional teams (e.g., project management, process improvement, international teams).
3-A-9	Disseminate information and promote training related to supply management policies and procedures.
3-A-10	Market the value of strategic sourcing and sourcing strategies and initiatives to management and internal customers.
3-A-11	Evaluate the supply management organizational structure and modify as necessary in order to achieve the optimal structure.
3-A-12	Hire, develop, retain, promote and/or dismiss supply management personnel.
3-A-13	Supervise and lead human resources to achieve initiatives.
3-A-14	Conduct/authorize job training for the professional development of the staff.

3-A-15	Develop/manage/evaluate/measure relationships with internal departments.
3-A-16	Develop/utilize criteria for evaluating supply management department performance.
3-A-17	Conduct role design evaluation and potential job redesign requirements.
3-A-18	Create and manage a succession plan, allocating work assignments in such a way as to provide career development and growth opportunities.

For the entire Exam Specification, visit the ISM website at <http://www.ism.ws/files/Certification/CPSMExamSpec.pdf>

### **New! Certified in Supply Management™ (CSM™)**

ISM recently announced the expansion of its Professional Credentials program to include the [Certified in Supply Management™ \(CSM™\)](#) designation, which debuts November 15, 2011. The CSM™ offers a certification option for those with experience in supply management and procurement who do not have a bachelor's degree.

ISM's Professional Credentials program now tests one supply management body of knowledge with two certifications – Certified Professional in Supply Management® (CPSM®) and Certified in Supply Management™ (CSM™).

The new CSM™ tests the same body of knowledge as the CPSM® credential. CPSM® and CSM™ candidates use the same study materials to prepare for their exams. Eligibility is dependent on a candidate's educational background and work experience.

	<b>CPSM®</b>	<b>New CSM™</b>	
<b>Education Requirement</b>	Bachelor's degree from regionally accredited institution or international equivalent	no college	Associate's degree from a regionally accredited institution or international equivalent
<b>Experience Requirement</b>	3 year of full-time, professional supply management experience (nonclerical, nonsupport)	5 years full-time, professional supply management experience (non-clerical, non-support)	3 years of full-time, professional supply management experience (non-clerical, non-support) with associate's degree

For information on ISM's professional credentials programs, visit the ISM Web site at: <http://www.ism.ws/certification/?navItemNumber=4891>

## How to Submit a Question to the Panelists

You will have four opportunities during the broadcast to submit questions to the satellite seminar panel. Questions of general interest that will appeal to a wide audience are encouraged. Our goal is to balance the amount of time spent on delivering valuable content to viewers and allowing interactive time via live Q&A. As we work within the program's time constraints to reach this balance, not all questions we receive can be answered during the broadcast. ISM program staff will work with the panelists to ensure a wide variety of questions relevant to the program topic are addressed on the air. There are three ways to submit questions:

- **Telephone (Voice):** Call in your question to **602-496-1686**. An ISM staff member will answer the telephone, transcribe your question, and deliver it to the program's host for consideration in an upcoming Q&A segment.
- **E-Mail:** Send your question via e-mail to [satsems@ism.ws](mailto:satsems@ism.ws)
- **Text Message:** send your question via text to: **480-381-9449**.

Use the form below as a worksheet to plan your question.

### Question Submittal Form

**Voice phone number:** The phone number to use is **602-496-1686**.

**E-mail:** The e-mail address is [satsems@ism.ws](mailto:satsems@ism.ws)

**Text message:** send your question via text to: **480-381-9449**.

**(Fill in the following information prior to making the phone call.)**

"Hello, my name is \_\_\_\_\_

I'm calling from \_\_\_\_\_  
(ISM affiliate, corporate site name, or city and state)

My question is for \_\_\_\_\_  the entire panel.  
(name of specific presenter/panelist)

**My question is (please print clearly):**

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## Special Note to ISM Satellite Seminar Viewers

This is ISM's final Satellite Seminar Program. Beginning in February 2012, ISM's satellite seminar product will be replaced by a Web-based program

This transition is a result of technology changes and other challenges in the distance learning landscape over the past few years. When ISM began producing satellite seminars in June 1995, broadcasting via satellite transmissions was a state-of-the-art method of providing distance learning opportunities. Today, after nearly 65 satellite seminar broadcasts, we are moving our distance learning programming for ISM affiliates to the Web.

Over the past few years, the Internet has replaced satellite transmissions as the preferred way of reaching audiences. Many ISM satellite seminar downlink sites report that their satellite receivers have become obsolete or inoperable, and repairs and upgrades are expensive. Today's work environment is also very different than it was in the mid-1990s. Satellite seminar attendance has declined as supply professionals are finding it difficult to take time out of their workday to attend these four-hour programs. While attendance at satellite seminars has waned, expenses to produce these programs have risen steadily.

We want to take this opportunity to thank you for your interest in ISM's satellite seminars, and we are hoping that you'll join us for our first Affiliate Webcasts:

- February 9, 2012      **Category Management and Understanding the Importance of Relationships**
- April 19, 2012      **Managing Demand through Effective Forecasting**

These programs will be one-hour, live streaming broadcasts, transmitted via Web-based technology. You will have the capability to view these programs individually on your own computer or, if your affiliate chooses, you will be able to attend affiliate events where these broadcasts will be shown in a group setting. In addition, the Affiliate Webcasts will be archived for ISM affiliate programming options.

Watch for Affiliate Webcast information, including registration and program details to be posted over the coming weeks at on the **ISM Website -- Online Education --Virtual Education Network (VEN)** page at <http://www.ism.ws/education/content.cfm?ItemNumber=21535&navItemNumber=5591>.

# **SECTION 2:**

# **PROGRAM GRAPHICS**

All materials contained in this *Program Handbook* are the property of the Institute for Supply Management™ unless otherwise noted. Members of our seminar panel have provided additional information and materials for your use. Please make sure that the proper source is credited if you use these materials in your organization.