

## **CMII 2003**

### ***The Sixteenth Annual CMII Conference***

*The Rosen Plaza Hotel, Orlando, FL*

*September 21 to 24, 2003*

### ***As-held Agenda***

**7:00am - 8:30am Registration, Continental Breakfast & Exhibits at The Rosen Plaza Hotel**

**8:30am - 8:40am "Good Morning CMII!" Master of Ceremonies: Mr. Craig Senior, CGI Group**

Craig Senior, a CMII grad, now works with the CGI Group ([www.cgi.com](http://www.cgi.com)) as the Configuration Manager of the Government of Canada's Secure Channel Project. Before CGI, he operated his own consultancy, worked for the LGS Group, and SHL Systemhouse. Through many roles and many clients, he observes that the real challenges to improvement are rarely technical, but human in nature. He's learned to keep a sense of humour and take things one change at a time.

He brings that sense of humour to his role as our Master of Ceremonies for the past five years. He is a member of Toastmasters and speaks for various groups: young and old, professional and community, business and charity.

One process he looks forward to continuously learning, never perfecting, is the parenting process for his two boys, Joshua 15 and Brandon 7.

**8:40am - 9:25am "CMII Awareness" by Mr. Steve Easterbrook, Institute of Configuration Management.**

The CMII Awareness session is an overview of how CMII fits into the activity of running a business. For those CM Professionals not familiar with CMII, this overview will aid in understanding a more effective and efficient approach to CM as practiced by CMII professionals. For those with CMII certification, the overview will provide an update of CMII principles previously learned, and is of great value in introducing CMII principles to your management.

Steve Easterbrook is vice president of government services and has been teaching and consulting for ICM for over 10 years. He was a CM manager with

the government and private industry for over 12 years before joining ICM. Steve holds a B.S. degree from Cornell and an M.B.A. from Bryant College. He is CMII certified and a certified CM process lead assessor. Steve is the CM Resource Guide editor and a past president of ACDM.

**9:30am - 9:55am "CMII for Managing Medical Products" by Mr. Randall Reavis, Smith & Nephew**

The Medical Device Industry is highly regulated and extremely competitive. To become a market leader, it is imperative that business processes become efficient and effective while maintaining the required product and process history. Configuration Management II principles will establish Smith & Nephew as the "First Choice" in Orthopaedic products.

Randall Reavis has BS in Mechanical Engineering and many years experience in design and manufacturing. Randall joined Smith & Nephew in 1997 as a Product Development Engineer. In 1999, Randall accepted a Project Leader position in the PDM team. Randall's responsibilities included coordinating cross functional teams to develop and implement improved business processes. In 2002, Randall completed CMII certification and a Master in Business Administration. Randall was promoted to Project Manager at the beginning of 2003 and he is determined to champion CMII principles.

**10:00am -10:30am Break in Exhibit Area**

**10:30am - 10:55am "Using CMII to Protect Intellectual Property" by Mr. Bill Deringer, RS Information Systems**

This presentation is a review of basic intellectual property law and the role of CMII in an organization's intellectual property management plan.

Bill is an attorney and systems engineer with more than 20 years of experience in the commercial and military electronics industries. He is a Program Manager with RS Information Systems whose experience includes production management, facility management, systems engineering and configuration management. Bill is an active CM practitioner and is CMII certified.

**11:00am - 11:25pm "CMII Challenges in an ICBM Environment" by Mr. Keith Gardner, Northrop Grumman**

Since the beginning of the Intercontinental Ballistic Missile (ICBM) Program, Configuration Management (CM) has played an important role in maintaining control of all documents, drawings, and software. Within the ICBM Program, the Guidance Integrated Product Team (IPT) deals with unique CM issues due to the large number of precision parts and the extraordinary organization between the Government and the Contractors. This presentation will focus on the CM issues

that the Guidance IPT is faced with, and what has been or will be done to deal with these issues.

Keith is the Guidance Integrated Product Team (IPT) Configuration Manager. He has been employed by Northrop Grumman on the Intercontinental Ballistic Missile (ICBM) Program for four years. Keith has a Bachelor of Science Degree in Logistics and Operations Management from Weber State University, Ogden, Utah and is CMII Certified.

**11:30am -11:55pm "CMII Process Improvement Update" by Mr. Jeff Weatherall and Mr. Delbert Anderson, Delphi**

In this presentation Mr. Weatherall and Mr. Anderson will discuss the continuing CMII Process Improvement at Delphi.

Delbert Anderson is an executive manager for Delphi within the Configuration Management core group that is responsible for the implementation of global configuration management processes and procedures. Delbert is certified in CMII, holds both a BSME and MBA, and has 30 years of experience in industry via a variety of U.S. and international assignments across engineering, manufacturing, and quality. In his current assignment, Delbert is addressing the host of real and perceived issues that surface when companies design products in one geographical region and subsequently build the designs across various product manufacturing locations around the world. Delbert has a strong appreciation for diversity and the subsequent posture it allows a global company to hold in optimizing a host of new business processes (e.g., CMII, lean practices, ZERO defects manufacturing, simultaneous management teams, etc.).

**12:00pm - 1:00pm Luncheon Sponsored by Aras Corporation**

**1:00pm - 3:45pm Breakout Sessions**

**1:00pm - 5:00pm Exhibits open**

**Monday Afternoon Breakout Session Details:**

**FLIGHT A: Demo of As-Planned and As-Released Baseline plus Changes**

**1:00 - 1:45pm usb**

**2:00 - 2:45pm Auto-trol Technology**

**3:00 - 3:45pm Serena**

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**FLIGHT B: Demo of As-Planned and As-Released Baseline plus Changes**

**1:00 - 1:45pm EDS**

**2:00 - 2:45pm PTC**

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**FLIGHT C: CMII Training Plan, Implementation, and Financial Justification**

**1:00 –1:45pm "CMII Training Plan" by Ms. Sharon Reed, Delphi**

This is a presentation and discussion opportunity that will address the issue of developing and following a CMII Training Plan.

Ms. Sharon Reed has been with Delphi Delco Electronic System for 28 years. She is currently a CMII Global Trainer and is responsible for Global CMII User Training. She interfaces within Delco to Competencies, internally to Delphi with other divisions and externally with other companies. Sharon is the CMII Lead for development of the GES/Metaphase Tool for processing Change Requests and Change Notices.

Sharon was CMII Certified June 1998 and started as part of the Delphi Delco CMII Steering team in 1999. She joined CMII Competency at Delphi Delco in August 2000 and was a part of the team which developed ICM Course XII CMII Principles and Delphi Tailored Applications which piloted in March 2001.

Sharon has two daughters and 5 grandchildren, and became an Ordained Minister in 1999. She is Pastor of Men, Women & Children Evangelistic Outreach Center of Kokomo, Indiana, and Founder of "The Esther Anointing" Ministry - an outreach for Single Women.

**2:00 - 2:45pm "Using CMII for PLM Implementation" by Mr. Terry Quan, Aras Corporation**

This presentation will identify common mistakes made on PLM Projects and will provide recommendations to apply CMII principles to PLM Projects to avoid these mistakes. The presentation will also provide recommendations to apply CMII principles to the early stages of a PLM Project. This workshop is designed to draw from the experience of the presenter and the audience.

Mr. Quan is Vice President of Professional Services for the Aras Corporation. Prior to joining Aras, Mr Quan was the founder and President of the Configuration Management Group, Inc. ("CMG"). He has extensive configuration management, information systems, project management, general management and engineering experience and he has provided consulting to companies and agencies in a wide variety of industries, including defense & aerospace, telecommunications equipment, semiconductor, electrical equipment, and computer hardware & software. Prior to forming CMG in 1995, Mr. Quan was an instructor and consultant with the Institute of Configuration Management ("ICM"). During his tenure with ICM he taught and consulted in the field of configuration management. Mr. Quan taught the full spectrum of courses offered by ICM in North America and Europe. Mr. Quan has recently rejoined the ICM roster as a part-time instructor. Mr. Quan has a Masters in Business Administration and a Bachelors of Science in Mechanical Engineering, both from Arizona State University. Mr. Quan also holds Configuration Management II certification and has taken various management and technical courses.

**3:00 – 3:45pm "Business Financial Justification for CMII Implementation" by Mr. Tad Leach, CSC Consulting**

Many CM practitioners struggle to gather executive support for investing in CM resources, systems, processes and training. They often feel the difficulty is in helping executives understand the importance of CM and what CM is really all about. In reality the difficulty is in translating the benefits of CM into business and financial terms that most executives can relate to. Once the language barrier is over, the next hurdle is to stand out from all the other initiatives competing for limited resources. This requires building allies and producing alignment within the executive ranks for investing in CM. This presentation will show some ways to break down the language barriers as well as build alignment and support based on showing how CM will contribute to many cross functional goals.

Tad Leach is a Principal Consultant for CSC Consulting within the Product Life Cycle Management practice of the Supply Chain Solutions Group. Tad is certified in CMII and has over 25 years of experience in industry holding numerous positions within engineering, quality and manufacturing. Prior to joining CSC Consulting, as a product development manager, Tad dealt daily with the many issues involved in managing a product's configuration across multiple plants located in various countries around the world. Tad has a strong background in enabling the virtual enterprise through the areas of computer-integrated manufacturing, process control, digital mockup, supplier management, and product data management. Tad enjoys utilizing his knowledge of Lean Manufacturing, Theory of Constraints and Concurrent Engineering techniques to improve his client's business processes and to help his clients serve their customers on a global basis.

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**Tuesday September 23, 2003**

**7:00am - 8:00am Registration, Continental Breakfast & Exhibits at The Rosen Plaza Hotel**

**8:00am - 8:25am "Bits and Pieces" by Mr. Jerry Pyka, Varel International**

Jerry Pyka is back in the oil patch after a four year stint in the aerospace industry. Jerry is the Plant Manager for Varel International's PDC plant located in Houston, Texas. Varel manufactures premium oil drilling tools for companies such as Exxon and Anadarko. As Plant Manager, Jerry is responsible for all activities at the Houston plant. He is in the process of applying proven configuration management techniques (CMII) to control the processes associated with running and maintaining a manufacturing facility, as well as the documentation associated with the manufactured parts.

Previously employed at SPACEHAB, Inc., a leading provider of commercial aerospace services, Jerry was the Quality Systems Manager responsible for all corporate quality issues. After assuming his duties as Quality Systems Manager, he quickly moved SPACEHAB through the ISO 9001:2000 upgrade process. Jerry received CMII certification from the Institute of Configuration Management in 1996 and serves as a part-time instructor for ICM. In addition to his duties at Varel, Jerry is an Adjunct Professor at the University of Houston where he teaches technical writing.

**8:30am - 8:55am "The Implementation of a New Change Management Process Conforming with CMII" by Mr. Hermann Tschantré, Pilatus Aircraft, Ltd.**

PILATUS Aircraft Ltd. is the only company in Switzerland which designs, produces and maintains aircraft, and has been doing so for over 60 years. We build business, transport and training aircraft. Today, we're the market leader in the field of Turboprop Training Aircraft. Approximately 2000 PILATUS aircraft are in use worldwide. Like other aerospace companies, we were heavily influenced by MIL-Standards but, from a Change Management standpoint, this was not ideal for us. Unhappy with the situation, we decided in 2000 to shop for something more suitable to our needs. That's when we discovered CMII.

Training our people was the first step to building up our CMII knowledge. With that knowledge we designed a new Change Management Process. Using CMII, we were able to create a whole new Change Process in a very short time. It had to fulfill all the different requirements, both in-house and externally. This presentation will show you how we approached the problem and used the CMII philosophy to come up with solutions independent from a PDM/PLM-Tool.

However, it was our goal to create a process that would, later on, be easily transferable into a PDM/PLM supported process.

Hermann Tshantré was appointed to take over the Configuration Management Department at PILATUS Aircraft Ltd. in 2000. With little experience in CM, and much to learn in a short time, he discovered the CMII classes and became CMII Certified that year. At the beginning of his first CMII course in Dallas, Hermann discovered the brand "BIG DOG". Throughout all the classes he wore "Big Dog" sweaters because, as he says, "Europeans never get used to air conditioners running though the wintertime!". Fellow students started calling him "Big Dog" and the name was then used back home to push CMII thru the company. Today his CM department is known as "The Big Dogs." Their motto: "We guide – we control – we bite!"

**9:00am - 9:25am "Process Before Tools" by Mr. Kevin Plemmons and Mr. Jeff Wield, HP**

The first temptation when implementing a configuration management methodology is to buy an eloquent IT software solution. Most organizations will experience schedule slips and costs that exceed budgets, without first establishing the configuration management process. Through a series of key points, we will demonstrate how to implement a CMII process without expensive software. We will present the benefits of a manual approach and emphasize that creating simple, practical applications will help drive long term IT requirements and build sustainable configuration management disciplines.

Jeff Wield graduated in 1980 from San Diego State University with a Masters degree in engineering. He has worked in the printing division of HP as a design engineer on development teams that delivered the first color ink-jet printer, the first large format ink-jet plotter, and the first all-in-one multifunction printer. After a couple of years working in Sony's TV product development, he returned to HP as Procurement Manager and Manufacturing Manager. He developed a product customization team, and now manages the consumer product completion engineering in North America. Jeff is married and has a 3 year old daughter who was adopted from China. In November, he will be returning to China for their second daughter.

Kevin Plemmons graduated from Averett University with a Bachelors degree in Business Administration. He has worked in the Hewlett Packard Inkjet Supplies Division for 15 years covering R & D product coordination, tooling documentation and internal Change Management process development. More recently, Kevin has implemented CM processes within four different contract manufactures that are supporting HP manufacturing. He is currently managing the Technical Information Services activity for the Imaging and Printing North America Region for Hewlett Packard. Kevin is married with two grown children and is enjoying the pleasures of a clean house and not having his teenage kids stealing his socks.

**9:30am - 10:00am Break in Exhibit Area**

**10:00am - 10:25am "CMII for a High Technology Product" by Mr. Curt Carlson, CNT Corporation**

The ability to document better and change faster is a critical factor in the success of a business whose products are complex, highly technical and rapidly changing due to a quickly-developing market and constantly-changing technology. However, small companies often rely on internalized but poorly-documented processes executed by specific individuals to meet daily challenges, while growth and changing requirements strain both the processes and the people involved. This is a story of small victories won and lessons learned while managing the engineering change process in a high-technology company.

Curt Carlson has over 25 years of experience in the computer networking industry, with four years in Configuration Management. He likes to claim that his BA in Philosophy from the University of Minnesota helped him develop an analytical outlook, while his experience, primarily in networking software, in a variety of companies and countries has accustomed him to the need for flexibility and rapid and constant change. He received his CMII certification in the previous millennium.

**10:30am - 10:55am "Back To Basics: CMII and Lean Thinking" by Mr. David Presuhn, Boeing Commercial**

After you've gotten their hearts and minds committed to CMII, there remains the implementation action plan. Lean, based on the Toyota Production System, offers a number of analytical techniques which are compatible with CMII principles. This presentation will explore this synergy and discuss how the Boeing CM community intends to capitalize on Lean in the improvement of its CM processes.

Dave Presuhn was born in South Dakota, with a family heritage of farming and railroading. His father, a veteran of the Army Air Corps, instilled in him an early appreciation for flying machines. An interest in science inspired him to pursue an engineering degree from the South Dakota School of Mines and Technology. Following graduation, he spent four years as a U.S. Army officer supervising construction projects in Germany, where he also learned how to downhill ski and play rugby. After an extended backpacking tour across Europe, he returned to college to study engineering management and business. He joined The Boeing Company in 1980 as a test-planning engineer on the 757. He immersed himself in the Pacific Northwest lifestyle, learning to sail, and climbing Mount Rainier. In 1986, Dave was promoted to management, supervising the 737/757 Test Integration Group. In 1990, he was named manager of 747/767 Program Integration, overseeing change planning and customer introduction commitments. In 1994, he joined the DCAC/MRM program, a re-engineering of

the bill of materials and ordering systems, and was named to his current position as Commercial Airplanes Configuration Management Manager. In 2001, he assumed additional responsibilities as the Product Definition Integration process manager and manager of engineering auditors. Dave and his wife Shannie and young son Troy recently moved into their dream house to enjoy country living near Auburn, WA. They enjoy downhill skiing and tennis, and are avid fans of local sports teams.

**11:00am - 11:25am "Merging Companies with CMII" by Ms. Hazle Ehlers and Ms. Katherine Vorhies, Intermec Technologies**

Many businesses have gone through mergers in the last decade. One company, Intermec Technologies Corporation, has emerged from this chaos to become a leader in Automated Data Collection and Handheld Computer systems. This presentation looks at how using CMII principles helped Intermec bring separate companies together into one new global corporation. We will also discuss how CMII principles laid the foundation for process standardization throughout the company, how Intermec achieved a bottom up implementation of a global change management system and the surprising benefits a CMII based change management system can generate for companies involved in mergers.

Hazle Ehlers is a Configuration Management Analyst for Intermec Technologies Corp. She was CMII certified in August 2000 and has been with the company for 19 years. She has worked in Configuration Management for 17 years.

Katherine Vorhies is Shared Services Manager for Intermec Technologies Corp. She is responsible for hardware and software Configuration Management as well as Component Engineering. Katherine was CMII certified in June 2001, holds both a B.Sc. in Mechanical Engineering and a Masters in Business Administration. She has 15 years experience in industry including assignments in Quality, Customer Support, Design Engineering, Program Management and Configuration Management. She is also the Business Process Lead and Master Data Team Leader for Intermec's SAP Globalization Project.

**11:30am - 11:55pm "The Challenge of Implementing Configuration Management in a Sales IT Organization" by Mr. Vern Waldorf, MCI**

Vern Waldorf is an Executive Manager of Engineering and Operations for MCI Digital Government Enterprises. With over 30 years in the information technology field, he brings a wide range of experience and wisdom to his current position. After a stint in the Air Force, he graduated from Humphrey's College in Stockton, California with a degree in Industrial Technology and spent over twenty years working for PG&E, ultimately holding the position of Superintendent of Computer and Network Operations for Northern California, before departing and joining MCI in 1995. Vern was CMII certified in 2002 and is currently involved in his first implementation. Once that implementation is complete, he is expecting gains in

terms of reduced operating costs, repeatable processes and reduced time to market, something that is critical in today's time and resource crunched business environment. In Vern's spare time, he enjoys employing his extensive project and configuration management skills towards the completion of his new home, the restoration of his classic cars and negotiating a horse purchase with his 12 year old daughter.

**12:00pm - 1:00pm Luncheon Sponsored by Auto-trol Technology**

**1:00pm - 3:45pm Breakout Sessions**

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### **Wednesday September 24, 2003**

**7:00am - 8:00am Continental Breakfast & Exhibits at The Rosen Plaza Hotel**

**8:00am - 8:25am "Process Leads and Technology Follows" by Ms. Patricia Goots and Mr. Van Gresham, RF Micro Devices**

Patricia Goots started working for RF Micro Devices in October 1999 and is currently working as the Product Development Facilitator for Corporate Engineering. Patricia graduated from Fairmont State College in 1995 with a Bachelor of Arts in Political Science.

Van Gresham is the Manager of Corporate System Processes at RF Micro Devices. He received a Bachelor of Science from Virginia Tech in Industrial and System Engineering in 1995 and is a graduate of UNC Greensboro's School of Business and Economics' Program for Management Development.

**8:30am - 8:55am "Configuration and Data Management within Program Executive Office, Littoral Mine Warfare" by Mr. Mike Howard, NAVSEA**

Mr. Ernest R. Mike Howard has worked for the Naval Sea Systems Command since 1975. He obtained a Bachelor of Science Degree in Business Management and has a Masters Degree in Management and Information Systems. Mr. Howard assumed his current position as Assistant Program Executive Officer Mine and Undersea Warfare for Configuration and Logistics Management (PEO LMW-L) in September 1998. As Assistant Program Executive Officer Mine Warfare, he is responsible for Configuration/Logistics Management and acquisition reform initiatives. He also serves as the Transition Manager for Deputy Under Secretary of Defense, Advanced Concepts Technology Demonstration (ACTD) for the Joint Distance Support Response (JDSR) initiative. He is solely responsible for the oversight of the Littoral Mine Warfare Other Procurement, Navy Spares and Operations and Maintenance, Navy budgets.

**9:00am - 9:25am "The Postal Service Engineering Adopts CMII" by Mr. Robert Pope, US Postal Service**

The Postal Service is a large organization that touches everyone in this country almost everyday. Implementing CMII in this environment is a huge challenge. Planning, patience and the ability to work with and through people are essential elements to making progress everyday.

Robert is Manager, Configuration Management in the Engineering Department of the United States Postal Service. He has been with the Postal Service for 29 years. Robert began his career as a Distribution Clerk in the Memphis, TN postal facility and has held a variety of technical, specialist, and managerial positions throughout his career. Robert has a Masters in Business Administration from Baker University, a Bachelors in Business Management from National Louis University, and an Associates Degree in Electronic Technology from the State Technical Institute of Technology at Memphis, TN. Robert is married to Margaret and they have three sons and three grandchildren. Robert will get his CMII certification this year so that Delbert will stop nagging him about it.

**9:30am - 10:00am Break in Exhibit Area**

**10:00am - 10:25am "CMII and Culture Change" by Ms. Lisa Roberts, Eagle Alliance**

It is a given that in order to implement CMII, process improvement needs to happen. The focus must be on the goal of improvement, not just on the method used to get there. Executive types must devote the appropriate resources and stay involved. Lower level management needs to be educated on CMII so that they know what is do-able and react appropriately. Support groups (that focus on process) need to plan changes, get them approved, and make sure the owners follow through.

Lisa Roberts is a Configuration Manager for Delivery Assurance at Eagle Alliance (a joint venture of CSC and Northrop Grumman). She has more than twenty years experience performing Configuration Management activities. Lisa began her career with the Federal Government, and has since worked in the banking industry, non-profit organizations, telecommunications and major corporations.

**10:30am - 10:55am "Unlocking the Value of PLM and Understanding the Core Value of CM" by Mr. Ray Wozny, Quantum Corporation**

January 2001: No online BOM, 100 day ECO average, multiple redlines, Excel spreadsheets for costing, suppliers in constant turmoil. March 2003: New PLM tool implemented, CMII principles being followed, suppliers receiving valid data.

Magic? No. Commitment and excellence from management and employees to change the processes and then implement an automated solution. Accomplished using CMII principles and Agile.

Ray has over twenty-three years experience at high technology firms including IBM, StorageTek, Exabyte and Quantum. Ray has nineteen years management experience focusing on change management, technical publications and design support. Ray was CMII certified in 1989 and was on the founding Board of Governors of the ACDM. Over the last eight years, Ray has been focusing on the integration of processes from new product introduction to volume ramp and end of life. In his current position as Director of Engineering Services at Quantum, he has the challenge of integrating processes and tools within the company and with suppliers and contract manufactures.

**11:00am -11:25am "KONFIG Configuration Management and CMII" by Mr. Howard Hillman and Mr. Steve Spradlin, Auto-trol Technology**

As part of its 41-year product development effort (hardware and software), Auto-trol Technology has used many CM methodologies. Since the early 1990's, Auto-trol has been investing in CM applications, culminating with its current CM product, KONFIG® Configuration Management (KONFIG CM). Beginning in 1999, Auto-trol began implementing the CMII methodology for KONFIG CM product development. This presentation provides insight into the process undertaken to migrate KONFIG CM product development to the CMII methodology and the results achieved to date.

Howard Hillman is President of Auto-trol Technology. Mr. Hillman received a BS in Economics from Princeton and an MBA from Harvard Business School. In 1960, he began his career in a major New York City Bank as a term lending officer and later as the Mergers, Acquisition and Venture Capital officer. From 1970-1985, Mr. Hillman was an independent venture capital principal. In 1985, Mr. Hillman became and continues to be Auto-trol Technology's President.

Having been associated with high tech operations for nearly fifty years, Mr. Hillman has found that “the more things change, the more they are the same.”

Steve Spradlin is the Executive Vice President of Centra 2000, Inc a wholly owned subsidiary of Auto-trol Technology. Mr. Spradlin received a BS in Electrical Engineering with Computer Option from Oklahoma State University. In 1988, he began his career as a software developer with management duties of F-16 flight training systems. Mr. Spradlin continued his career in software development including Space Station training systems and Oil and Gas exploration software. In 1996, he began working at Centra 2000, Inc. and eventually became leader of KONFIG CM product development. Mr. Spradlin has been heavily involved with configuration management since his career began and thoroughly enjoys the application of computer technologies to help in the world of configuration management.

**11:30am - 12:00pm Closing Remarks and Acknowledgements**