Business Process Excellence
– Financial Services Implementation Case Study

By: John A. Wood, MBA, MBB, PMP
Senior Vice President – Broadway Bank

When: Friday, January 9th, 2015, 11:45AM – 1:00 PM

Where: Engineering Building (EB) 3.04.66 on UTSA Main Campus
(MAP: http://caml.utsa.edu/Event_files/CAML_MAP_CIP_Meeting.pdf)

RSVP: Contact Dr. Hung-da Wan (hungda.wan@utsa.edu) to reserve your seat

Presentation Summary

As medium and small financial services institutions struggle to compete and prosper in a low interest rate – high regulatory environment, aligning continuous improvement efforts around strategic goals in an effective way can be a challenging endeavour. Since financial service industries are already burdened with processes that must be compliant with numerous laws and examination criteria, great care and creativity must compliment the science of continual improvement.

Our case study presentation explores the challenges and opportunities revealed during the implementation of a formal continual improvement and Business Process Excellence program at a community bank where process management is aligned around a functional organizational structure, and adoption of process improvement methodologies common in manufacturing is difficult both technically and culturally.

Speaker Information

John A. Wood – Broadway Bank has served as Continual Process Improvement Officer since 2007 and has taken Broadway’s continual improvement efforts from basic LEAN concepts to the first stages of formal Business Process Management Excellence/Management. His program includes Six Sigma process capability monitoring, internal Service Level Agreements (SLAs), Project Management methodologies, and core process Key Performance Indicator (KPI) development. John has written continual improvement articles for Broadway’s Family Owned Business Resource Center, and Broadway’s Moneywise customer newsletter. John has also delivered continual improvement presentations to the business community via networking through the North San Antonio Chamber.

Prior to joining Broadway, John served as an analyst/project manager for the State of Texas and DoD. John retired from the US Navy after 21 years of service where he managed the maintenance/operation/modernization of fleet warship/shore-based IT, communications, combat/electronic systems, and infrastructure.

John has taught Management and Organization Behavior as adjunct faculty at Park University and holds a Master of Business Administration degree. John is also a Lean-Six Sigma Master Black Belt (MBB) and Project Management Professional (PMP).