

DAAG 2015 CONFERENCE PROGRAM

The **Society of Decision Professionals** along with **Intel, Caesar Systems, Shell** and **Strategic Decisions Group** cordially invite you to attend the 21st DAAG Conference at the Waterfront Beach Resort – A Hilton Hotel in Huntington Beach, California. DAAG is known across industries to unite practitioners in DA application and implementation from pharmaceuticals, to military, to oil and gas, to manufacturing and high tech.

Wednesday, April 8

Society of Decision Professionals Workshops

Wednesday April 8, 8:00 – 12:00

SDP is offering two half day workshops that will be running concurrently:

WORKSHOP 1: Facilitative Leadership

Instructors: Bruce Judd and Konrad Knell of Strategic Decisions Group

This four-hour workshop is designed for decision process leaders who currently facilitate team meetings or who plan to. These meetings can be focused on framing decision situations, creating alternative strategies, assessing quantitative information, and leading decision makers toward the right decision for their situation.

Through a series of group exercises, we will illustrate some facilitation challenges and best practices that will benefit practitioners. Some of the best practices can take years to master, under the mentorship of experienced facilitators. However, the workshop is designed to generate the awareness that is the first step on this journey to facilitation excellence.

Some of the topics that will be covered in these experiential exercises and debrief discussions include:

- The role of the facilitator
- Skills of basic facilitation
- Group dynamics
- Leadership styles as they relate to facilitation

The workshop is primarily experiential learning. The exercises generate awareness of the situations and their challenges, and they give participants an opportunity to try their skills, in a high feedback environment. The exercises are drawn from the workshop leaders' professional experience as decision consultants.

Who should attend this workshop?

This workshop will be of interest to the new practitioner and the seasoned professional.

This workshop is limited to 48 participants.

WORKSHOP 2: Strategic Portfolio Management

Instructors: David Matheson and Somik Raha of SmartOrg

The fundamental challenge in portfolio decisions is to say "no" to good ideas to free resources in support of higher-value ones, which easily degenerates into political and power-driven decision making. Persuading people to make and accept decisions requires adapting decision-quality principles and practices to the portfolio context. Done well, strategic portfolio management provides an ideal opportunity to embed DA into an organization, foster decision quality at scale and improve value delivered from portfolios of R&D, NPD, innovation and other business opportunities. Topics will include a Portfolio Dice Simulation, the Principles of Strategic Portfolio Management and Case Examples of SPM as Embedded DA.

Who should attend this workshop?

This workshop will be of value to practitioners with at least a year or two of experience and to seasoned professionals.

This workshop is limited to 30 participants.

SDP Sponsors "Meet & Greet"

Wednesday April 8, 1:00 - 2:30

SDP Business Meeting

Wednesday April 8, 2:30 – 4:30

All members of SDP and DAAG 2015 attendees are welcome

SDP Sponsors "Meet & Greet"

Wednesday April 8, 4:30 - 5:30

DAAG Welcome Reception & Registration

Wednesday April 8, 6:00 – 7:30

All participants of the DAAG Conference are welcome; menu will include "Heavy Appetizers" and drinks.

Thursday, April 9

Welcome to DAAG 2015, Day 1: conference organizers

Thursday April 9, 8:00 – 8:15

Session 1

Decision Makers: Decision Making & Organizational Effectiveness

Keynote Speaker: Richard Mills

Lieutenant General Richard P. Mills is an active duty Marine who served in combat tours as the Commander, Ground Combat Element, Al Anbar Province, Iraq and the I Marine Expeditionary Force (Forward) which deployed to Afghanistan as part of the International Security Assistance Force (ISAF). While in Afghanistan, LtGen Mills was selected to command the newly-created ISAF Regional Command (Southwest) in Helmand Province. He was the first Marine Corps General Officer to command NATO forces in combat.

Thursday April 9, 8:15 – 10:15

Chairs: Carl Spetzler, Strategic Decisions Group (CSPETZLER@SDG.COM)

Meredith Brown, Shell (MEREDITH.BROWN@SHELL.COM)

Abstract: This is a formal panel discussion with three speakers from the US military, Oil and Gas, and Pharmaceutical industries. The speakers are Lieutenant General Richard Mills (USMC), Mark Guadagnini (Shell Oil – Alaska), and Andrew Dahlem (Eli Lilly and Company). The session leaders will introduce the panel members and ask them prepared questions about their decision making processes in an attempt to learn more about the types of information executive decision makers require before committing to a decision. The panel will also be asked to provide insights to the different techniques they use to address immediate decisions compared to deliberate decisions. Questions from the audience are encouraged.

Session 2

Decisions and Change Management - Leading from the Middle

Thursday April 9, 10:45 – 12:15

Chairs: Meredith Brown, Shell (MEREDITH.BROWN@SHELL.COM)

Pat Leach, Decision Strategies (PLEACH@DECISIONSTRATEGIES.COM)

Abstract: This session will also include speakers from the military and oil and gas industry as well as other areas. They will address the challenge of exercising leadership without authority to effect change management. This session will focus on questions such as: How do you lead from the middle? How do you implement change when corporate incentives don't encourage good decision making? Our speakers will provide inspiring ideas to implement in our own companies.

Speakers:

- Katherine Rosback, KRE Inc. - *Asking is Better Than Telling – The Art of Facilitative Questioning in Creating Change*
- Colonel Todd Ford, USMC - *Leading from the Middle: Organizational Resource Decisions and Risk Mitigation*

Session 3

Metrics of Value

Thursday April 9, 1:15 – 2:45

Chairs: Reidar Bratvold, University of Stavanger (REIDAR.BRATVOLD@UIS.NO)

Somik Raha, SmartOrg (SRAHA@SMARTORG.COM)

Abstract: What metrics should we use in evaluating opportunities or the performance of our organizations? Sometimes, people use metrics simply because other people around them are using it. As Decision Analysts, we are often called upon to advise on the right metrics for the situation. Metrics are constructs that are powerful because they help drive action. Sometimes that action gets us toward what we value, and sometimes not. What is the collective wisdom in our community on the wise use of metrics? This session will focus on mining Metrics Patterns that that have served us well, resulting in a living document that will serve practitioners and consumers of Decision Analysis. If you have a story on how a metric has been misused or misunderstood, please write to Reidar and Somik.

Session Structure:

- Short setup explaining motivation of session around metrics, the format of the pattern language we'd like to use, and examples of patterns (15-20 mins)
- Table discussion of metrics patterns using the structure of the pattern language. People asked to join tables that are discussing metrics they are passionate about. (40 mins)
- Plenary sharing of resulting patterns (30 mins)

After-Session follow-up

- Document patterns and publish on our new website
- Produce a PDF/Slide Catalog of Patterns that analysts can give to clients to help educate them on metrics

Session 4

The Heart of Decision Analysis

Thursday April 9, 3:15 – 4:45

Chairs: Tyler Ludlow, Eli Lilly (TYLER@THELUDLOWS.ORG)

Somik Raha, SmartOrg (SRAHA@SMARTORG.COM)

Abstract: This session will explore the Heart of Decision Analysis - both what's at the core/root of DA, and the value that DA provides to the world (ie why the world should care about DA). Or as Ron

Howard put it at DAAG 2014, “I’ve learned many important things that can be succinctly expressed without equations.” What is it about DA that deeply resonates with us? What aspects have we internalized? What about DA “strikes a chord” with, or has significantly altered, our personal world views? We will explore answers to these questions through pre-recorded videos and reflections among audience members, attempting to identify recurrent themes. Recognizing the value and impact of DA will help us to be better practitioners. We will also collect and condense these themes after the session, to propose a meta-strategy for the Society of Decision Professionals that makes clear why the world needs us.

DAAG Networking Dinner

Thursday, April 9, 6:00 pm - 9:00 pm

Sandy's, located at 315 Pacific Coast Hwy, (half a mile walk from the Hotel)

Friday, April 10

Welcome to DAAG 2015, Day 2: conference organizers

Friday April 10, 8:00 – 8:10

Keynote Speaker: Karen Sepucha, PhD

Dr. Sepucha is the director of the Health Decision Sciences Center in the General Medicine Division at Massachusetts General Hospital and an assistant professor in Medicine at Harvard Medical School. Her research and clinical interests involve developing and implementing tools and methods to improve the quality of significant medical decisions made by patients and clinicians. She is responsible for efforts to implement shared decision making tools into primary and specialty care at Mass General.

Friday April 10, 8:10 – 9:00

Session 5

Building Decision Bench Strength

Friday April 10, 9:00 – 10:30

Chairs: Ellen Coopersmith, Decision Frameworks (ELLEN@DECISIONFRAMEWORKS.COM)

Charles Persinger, Eli Lilly (cpersinger@lilly.com)

Abstract: What are different strategies to develop Decision Analysis skills in people within an organization to enable Decision Quality? How do different companies build their internal armies? How do different companies enable skills outside of their internal DA army to help enable Decision Quality? What are different ways that companies go about doing this (regular companies as well as Decision Analysis consultancies)? What are the different things that companies have found that work and that don't work, and why?

To understand this daunting task and the journeys that different companies have chosen for this goal, discussions in this session will cover a wide range of relevant issues including:

- People selection --- what types of people are selected to be developed into full blown DA consultants or practitioners (education, degrees, attributes, etc.)??
- Aspects of DA skill targeted for development - do companies strive to develop all aspects of DA skill in each individual, or do they focus on developing at least one aspect well, such as framing, decision maker dialogue, uncertainty analysis analytics, etc.?
- Training vs. experiential - what formal training versus application experience is helpful, what is the right balance?
- Time frames, expectations and sustainability - how quickly can an internal army be built?
- How is bench strength maintained? What are the challenges and approaches to maintaining a sustainable internal army?
- DA skills/expertise vs. industry context expertise ☐ how do companies balance/prioritize
- core DA skills vs. context expertise in the work area / industry? Do they hire context experts and teach them DA or hire DA experts and teach them the industry (or is industry expertise not really that important)?

Panelists:

- Consultancy (SDG) – Bruce Judd
- Tech (Intel) – Jim Driscoll
- Military – Greg Parnell
- Oil and Gas (Chevron) – Christa Roemkens
- Pharma (Pfizer) – Rodger Thomson

Session 6

Decision Education Foundation: Introducing Decision Quality to Students

Friday April 10, 11:00 – 12:30

Chair: Frank Koch, Koch Decision Consulting (FRANK@KOCHDECISIONS.COM)

Abstract: This session will cover three case studies of DEF projects where DAAG members have been involved. We will discuss the approaches used, the students' reception of the concepts and examples of how they are using the DQ concepts in their decisions. The session will also include a short brainstorm on how other DAAG members can get involved.

Speakers:

- Drew Annis, Decision Education Foundation - *The Path to an Engaging Decision Quality Curriculum for People of all Ages and Backgrounds*

- Amy Stranieri, Thurston H.S. and Frank Koch, Koch Decision Consulting - *Decision Education at Thurston High School, Springfield, OR*
- Jim Felli, Lilly - *Using Cities to Teach Economics and Resource Management*

Session 7

Case Studies

Friday April 10, 1:30 – 3:00

Chairs: Jay Andersen, Eli Lilly (jsa@lilly.com)

Scott Bartsch, Nexen (SCOTT.BARTSCH@NEXENCNOOCLTD.COM)

Abstract: This session will feature three speakers who will share actual applications of Decision Analysis in the form of case studies. The speakers will summarize their work and highlight the insights gained, giving particular emphasis to any lessons learned that span multiple situations or industries. The presentations may also include discussion of the approaches used which enabled robust decision maker dialog leading to decision clarity.

Speakers:

- Max Henrion, Lumina Decision Systems - *From controversy to consensus: Decommissioning California's offshore oil platforms*
- Jon Mauer, Pfizer – *Portfolio and Decision Analysis and The Fight Against Antimicrobial Resistance*
- Dave Matheson, SmartOrg - *Cutting Costs without Cutting the Future*

Closing Session

DAAG Business Meeting & Planning for DAAG 2016

Friday April 10, 3:30 – 4:30

Chairs: Jay Andersen, Eli Lilly (jsa@lilly.com)

Meredith Brown, Shell (MEREDITH.BROWN@SHELL.COM)

Co-chairs of DAAG 2016 program committee (TBD)

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