CONFERENCE PROGRAM

TOC INNOVATION SUMMIT

OCTOBER 5 -8

The fastest way to results? Focus on the right problem.

The TOC Innovation Summit isn't about theory or frameworks—it's about finding the one thing that's holding you back and giving you a clear, practical plan to fix it. In four days, you'll get real answers from people who've done it, so you can stop guessing, stop spinning, and start making real progress where it counts

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The Theory of Constraints International Certification Organization (TOCICO) is a global not-for-profit organization uniting companies, practitioners, consultants, academics, and students who seek the exchange and development of the Theory of Constraints (TOC) knowledge and who share a passion for win-win holistic thinking. With the world's largest repository of TOC content and with resources, certification, and conferences recognized worldwide, TOCICO is proud to be a primary source and catalyst for TOC knowledge.

TOCInnovationSummit.com

Sunday, October 5th

(Agenda Preview – Details Subject to Change)

12:30pm **Registration**

Attendee check-in and badge pick up

1:00- 6:00pm **The Goal Simulation Workshop**

If you're a manufacturing executive or manager, this workshop uses a hands-on simulation to teach how techniques from The Goal can boost capacity, improve delivery, cut inventory and costs, and increase profit.

1:00- 6:00pm **Crash Course in Critical Thinking - Introduction to the Thinking Processes**

This workshop is for anyone new to TOC Thinking Processes, offering a hands-on introduction to the tools, their purpose, and how to apply them to real-world situations—equipping participants with foundational logic skills they can use immediately and build on over time.

1:00- 3:30pm **MRO Focused Workshop**

Details Coming Soon!

3:30-4:00PM **Coffee Break**

4:00-6:00pm **Sustaining the Change: Building Long-Term Success Beyond the Implementation Engagement**

This hands-on workshop is for consultants and clients looking to sustain TOC results long-term, focusing on how to prevent backsliding by addressing early-stage gaps, aligning measures and habits, and embedding change into culture and leadership to turn short-term success into lasting performance.

6:30-8:30pm **Welcome Reception**

Sponsored by WiseTech Global

Monday, October 6th

7:00am **Registration**

Attendee check-in and badge pick up

8:30am **Opening Remarks**

Attendee check-in and badge pick up

8:30am **A Trillion Dollar Challenge**

Ian Larsen , Head of Operations, WiseTech Global

10:00am **Ridiculous? Radical? Rational?**

Sanjeev Gupta , CEO Realization

12:30 **Lunch**

1:30 **The ONE THING Focusing Cycle to achieve Hyper-FOCUS**
How to combine TOC's 5 Focusing Steps and the Cloud to find and maintain focus on the next ONE thing.

Dr Alan Barnard , CEO Goldratt Research Labs

Tuesday, October 7th

(Agenda Preview – Track Overview)

Maintenance, Repair & Overhaul (MRO)Track

The Rules of Flow for MRO

Andy Watt (Goldratt UK)

90-Day Turnaround: Rapid Results in MRO through TOC Implementation

Sanjeev Gupta (Realization)

Solving MRO Challenges in Real Time: A 90-Day Turnaround Working Session

Sanjeev Gupta + Attendee Participation

Success Story Presented by Embraer

Details Coming Soon

Novel ToC Driven Approach to Prioritization and Execution of Complex Production

Rob Richards, Tim Cook & Matt O'brien (Boeing)

TOC-Enabled Solutions: Technology & AI

TOC-Driven Manufacturing Excellence

Jack Warchalowski & Duncan Patrick

AI: The Future of Thinking

Wolf McNally

The Evolution of Critical Chain Software

Rob Newbold

AI-Powered TOC: Accelerating Thinking Processes & Managing AI Task Tokenization

Daru Gilisey

Democratizing TOC Thinking Processes via Generative AI and AI Agent

Nakai Hirostugu

Utilizing Theory of Constraints and System Dynamics with AI to Enhance PTSD Research Collaboration

Christoph Lambert, Don Greer & Alexandria Viszolay

Using TOC Thinking Processes in AI Adoption

Thorsteinn Siglausson

Intersection of TOC, AI, IT and Flow to Improve Risk Management

Daniel P. Walsh

TOC Adoption: The Wills and the Won'ts

Humberto Baptista

Critical Chain & Coaching: Because Businesses Deserve Better Than Chaos

Julija Lobaskina

Government & Public Sector

Plenary Session with Kristen Cox

Details Coming soon

Governing for Quality of Life: Resolving Chronic Conflicts through TOC Thinking

Alfredo Mycue, Eli Schragenheim, Andrew Kay, Guido Bacharach

On the Horns of a Dilemma: Using TOC to Make Better Insource vs. Outsource Decisions in Government

Alfredo Mycue

Wednesday, October 8th

(Agenda Preview – Track Overview)

TOC + Healthcare

Success Story Presented by Centra Health

Dr David Boger, Centra

How to fix your ER (& Hospital) using TOC + Lean

Jeffrey Dryer, MD

90 Day Turnaround –Healthcare Focus

Sanjeev Gupta (Realization) + Industry CEO

90 Day Turnaround – Healthcare Working Session

Sanjeev Gupta + Attendee Participation

Using Data Analytics to Improve Emergency Department Throughput

Joseph Portale & Kyle Wasserman (Captial Health)

Session Presented by Danilo Sirias

TOC + Healthcare Confernece Chair

Keep from Falling Through the Cracks: Reducing Patient Falls Through Constraints Management and High Reliability — From Patient Bedside to Boardroom

Bahadir Inozu Binozu

TOC in Action: Supply Chain, Manufacturing & Industry

Systemic Alignment as a Catalyst for Enterprise and Societal Transformation: A Case Study from Comstock Inc.

Corrado De Gasperis, CEO of Comstock Inc

90-Day Turnaround: Breakthrough Performance in Mining:

Sanjeev Gupta

Live Working Session: Applying a 90-Day Turnaround Approach in Mining

Sanjeev Gupta

TOC in Action: Supply Chain, Manufacturing & Industry

Applying the Theory of Constraints: Insights from Neogrid

Miguel Abhuhab, Neogrid

Success Story Presented by Belgotex

Kevin Anthony, COO Belgotex

Success Story presented by WiseTech

Details coming soon

What's a Goldratt? How We Found the One Constraint That Changed Everything

Val King, CEO Whitehat Technologies

The Theory of Constraints: A Necessary Framework for Effective Digital Technology Integration

Thomas Mazzone

CCPM in Action

Matt O'Brien, Boeing

Enhancing Manufacturing Efficiency and Quality Compliance Through TOC: A Practical Approach for Sheet Metal and Tooling Industries

Pramod Patil, Geektool Engineering Pvt ltd

Success Story presented by Harkesh Rubber

Darshan Shah, Managing Director of Harkesh Rubber

Protect availability and improve product freshness in distribution systems using AI/ML in Demand Sensing and Dynamic Buffer Targeting

Rakesh Sinha

The Learning Team as Constraint: Integrating Teamology in the Theory of Constraints

John van der Steur & Willem de Wit

ToC for Value (V2C): Experiences & Entrepreneurs

Richard Zultner

Workshop

The Goal Simulation Workshop

Presented by Duncan Patrick & Jack Warchalowski

SUMMARY If you are an Executive or a Manager in a Manufacturing Organization this hands-on workshop is for you. It will teach you and your management team via a realistic, hands-on production simulation, how to use the techniques outlined in the Goal to increase productive capacity, improve on-time delivery, decrease inventory, reduce costs, and maximize net profit. For more info, please click this link - https://cmsmontera.com/goal-workshop/

SPEAKER BIO Jack Warchalowski is the CEO of CMS Montera Inc. CMS Montera specializes in software and consulting that helps clients solve problems in Operations and the Supply Chain. Jack helps organizations enhance their profitability and competitive position through the implementation of strategic improvement initiatives driven by CMS RoadRunner software. Jack is a Certified Management Consultant and a Professional Engineer registered in Ontario. He holds an MBA degree from the Wilfrid Laurier University and a Bachelor of Applied Science in Mechanical Engineering from the University of Waterloo in Waterloo, Ontario. In addition, Jack is certified by the TOCICO in all aspects of TOC.

Duncan Patrick is Executive Vice President of CMS Montera Inc. CMS Montera specializes in software and consulting that helps clients solve problems in Operations and the Supply Chain. Duncan's business consulting career is focused on working with clients to assist them solve problems in operations and the supply chain related to lead times, the forecast, inventory, capacity, on time delivery, product development speed and market focus. Duncan holds an MBA degree from the Richard Ivey School of Business, Western University and a Bachelor of Commerce degree from The University of Calgary. Duncan is certified by the Theory of Constraints International Certification Organization in all aspects of TOC. In addition, Duncan is a Certified Management Consultant.

Course in Critical Thinking - Introduction to the Thinking Processes

Presented by Peter Cronin

SUMMARY This workshop is for anyone new to the Theory of Constraints Thinking Processes. This is an area of TOC that sometimes misses the limelight of DBR and CCPM, however, can be considered both more broad reaching, and

more important for organizations and individuals. There are three key areas the workshop will cover: 1. Learners will be given an introduction and overview of the Thinking Process toolset, providing context for all the various tools and their purpose. Leaving with a map of how the tools fit together, and what the purpose of each tool is. 2. The why of the Thinking Processes. We all know how to think already, right? So why are these tools so important to learn and apply effectively. 3. Learning the fundamental logic structures by applying them to real world situations. Leaving with the skills to use the basics in everyday life, and enough understanding to build on these skills by learning more of the TP toolset. Being a workshop the majority of the time will be spent on learning and application!

SPEAKER BIO Peter is the head instructor of the Black Belt in Thinking (Thinking Process training course). Even after a decade of teaching others how to use these critical thinking tools, he is still endlessly fascinated by the innovative ways people think and learn. Whether they are leaders, business owners, entrepreneurs, or individuals, Peter's passion is seeing and helping people create real solutions to what they thought were 'unbreakable' problems.

Sustaining the Change: Building Long-Term Success Beyond the Implementation Engagement

Presented by Lisa Scheinkopf

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SUMMARY This hands-on workshop will focus on one of the biggest hurdles in TOC consulting: sustaining the change long-term. TOC implementations are known for the phenomenal results they attain in extremely short timeframes, delivering through-the-roof ROI. Nevertheless, TOC implementations seem to be subject to the same forces that many other change initiatives fall prey to. Despite the incredible results, too many companies eventually revert to their old ways and the results fade away. The good news: if there is any community that can figure out how to change that trajectory, it's the TOC community. This workshop will focus on identifying the key gaps in the early stages of a TOC implementation that hinder the ability to sustain results. Participants will work through interactive exercises to uncover these barriers and identify the key levers for keeping improvements moving forward, ensuring that the implementation isn't just a one-time success but a launching pad for the next leaps in performance. We will explore behavioral and cultural shifts required for lasting success, and dive deep into the importance of agreeing on new measures, instilling new habits, and aligning systems to support the change. We will also touch on succession strategies that integrate criteria to prevent new managers or executives from reverting to outdated cost-world thinking. If you're a consultant, you will gain actionable strategies to enable your client to embed the changes and ensure that improvements continue long after the engagement ends. If you're a client of consultants, you will gai actionable strategies to ensure that your investment continues to pay off long after the engagement ends.

SPEAKER BIO Lisa Scheinkopf founded Jenrada LLC in 2019 after more than 30 years in the TOC consulting and training field, which culminated in 14 years as a Partner with Goldratt Consulting. There, she served as global processes director, headed up the firm's consulting practice in North America and India and headed up the Goldratt School. After working with Dr. Eliyahu Goldratt to develop the TOC Thinking Processes, Lisa wrote the definitive TOC

reference, Thinking for a Change: Putting the TOC Thinking Processes to Use (St. Lucie Press, 1999). "I am proud of the fact that this is the only book on the TOC Thinking Processes that Eli Goldratt personally endorsed." Lisa has been at the forefront of TOC for more than 30 years, using her passion for breaking down barriers between people to transform the powerful breakthrough thinking of TOC into actions and results that benefit all stakeholders. Lisa has consulted to companies large and small around the world, teaching and coaching from the top floor to the shop floor. Along the way, she has developed new TOC based solutions that apply across a broad spectrum of industries. Lisa is a contributing author to the TOC Handbook (McGraw-Hill, 2010) and her articles have been published in a variety of professional publications. Her passion and knowledge, combined with a unique ability to connect with people from the podium, have gained her popularity as a public speaker on a wide range of TOC subjects. Lisa is a former TOCICO Board Member and Chairperson and in 2018, she was awarded the TOCICO Lifetime Achievement Award. Lisa has worked with hundreds of leaders, change makers and companies around the world to radically increase performance by creating an environment of innovation, inspiration, and harmony.

Workshop focused on MRO

Presented by ANDY WATT

GOLDRATT UK
Knowledge that delivers™

SUMMARY Details Coming Soon!

SPEAKER BIO Watt: Transformational Leader with 35+ Years of Expertise Industry Expertise: Production, Distribution, MRO, Supply Chain, Project Management. Track Record: 15 years in senior roles within the defence industry; over 30 years implementing Theory of Constraints (TOC) and Critical Chain Project Management (CCPM). Career Highlights: Joined The Goldratt Institute in 2000, delivering TOC training, coaching, and consulting. Worked directly with Dr. Eli Goldratt, applying TOC principles to solve critical business challenges. Took over Goldratt UK in 2007 to extend TOC consultancy across the UK. Led the team at Goldratt UK in the implementation of TOC and CCPM across hundreds of organisations worldwide.

Monday, October 6th

A Trillion Dollar Challenge

Presented by Ian Larsen

SUMMARY The global logistics industry is $11 Trillion, approximately 10% of global GDP, beset with macro challenges and operating with extensive local optima. WiseTech is developing global industry solutions to meet these challenges – these are problems worth solving.

SPEAKER BIO Ian Larsen joined WiseTech Global in mid-2018, initially as GM Global Software Operations managing the software engineering and product development functions, later taking responsibility for delivery and productivity across the group. Prior to joining WiseTech Ian has worked for both large and small industrials across mining, utilities and manufacturing in a 35 year career delivering technology solutions . Ian holds a Bachelor of Management Studies, Majoring in Computer Science, from the University of Waikato (NZ)

Ridiculous? Radical? Rational?

Presented by Sanjeev Gupta

SUMMARY Every industry, or even company in an industry, creates value in its unique way. But the patterns of inefficiency are the same across industries. Yes, they are. And so are the solutions to break those patterns.

SPEAKER BIO Sanjeev Gupta Bio Most recently, Sanjeev Gupta was the CEO of Vulcan Mozambique, Africa's largest coal mine. Within the first 90 days, he led impressive improvements in profitability, mining production, and logistics, setting the mine on a path to sustained success. Sanjeev's journey in turnarounds began early in his career at Xerox, a Fortune 100 company, where, as a junior manager, he turned around its worst-performing factory and made it the best-performing one. This initial success led him to found Throughput Technologies, where his team provided software based on the Theory of Constraints for factories. He worked with companies ranging from $5 million to $5 billion, improving throughput by 20% to 50% and reducing lead times by over 50%.

He later founded Realization Technologies, offering similar software and consulting services for project-based organizations. There, he achieved comparable throughput improvements, with lead time reductions varying between 25% to 75%. His clients included organizations such as ABB, BHP Billiton, Boeing, L & T, Medtronic, Siemens, and the U.S. Armed Forces (Air Force, Army, Marine Corps, and Navy). Sanjeev is a graduate of the Indian Institute of Technology, Delhi, Virginia Tech, and Carnegie Mellon University.

The ONE THING Focusing Cycle to achieve Hyper-FOCUS

How to combine TOC's 5 Focusing Steps and the Cloud to find and maintain focus on the next ONE thing.

Presented by Dr Alan Barnard

SUMMARY TOC offers a bold promise to leadership teams: it will help them FOCUS on what matters most. It tells us to focus on the Constraint. But real-world systems are messy—there are many goals, many constraints, many problems, many conflicts, and many possible solutions. So how do we find and focus on the next ONE Thing?

This session introduces the ONE THING Focusing Cycle, a simple yet powerful way to cut through complexity. By combining Dr. Goldratt's 5 Focusing Steps with his ProConCloud method, this step-by-step method helps teams and individuals identify and resolve the next 1 Goal, 1 Constraint, 1 Problem, 1 Conflict, 1 Innovation, and 1 Experiment to focus on.

If you're ready to move faster with more clarity and less overwhelm, this session is your next best step.

SPEAKER BIO Dr. Alan Barnard is a leading decision scientist and Theory of Constraints (TOC) expert with almost 20 years of experience working directly with Dr. Eli Goldratt, the creator of TOC. As the CEO of Goldratt Research Labs (USA), Alan focuses on using advanced technologies and decision sciences to develop Apps and Decision Support methods, enabling organizations to achieve more with less time. Under his leadership, Goldratt Research Labs has collaborated on innovation and research projects with renowned Fortune 500 companies like Microsoft, Cargill, BHP, Tata Steel, Amazon, and others, along with public sector organizations like Utah Governor's Office and UN WFP. Alan has held prominent roles in various organizations, including past-President of the South African Supply Chain Society SAPICS and past-President of TOCICO. His significant contributions have been recognized through prestigious awards, including inclusion in the 2020 Marquis Who's Who Global Listing, membership in the Forbes Technology Council, and the TOCICO Lifetime Achievement Award. He is an accomplished author and frequent presenter on Decision Making in a Complex World and Theory of Constraints at international conferences. Alan's latest book, "The Bottleneck - How to resolve our attention crisis," is currently in progress. As the chief architect of the award-winning HARMONY Decision Maker, Change Simulator, and Change Maker series of Decision Support Apps, Alan continues to shape the landscape of decision science and TOC. Please let me know if you need any further information or details.

Maintenance, Repair & Overhaul (MRO)Track

The Rules of Flow for MRO (Maintenance, Repair, and Overhaul)

Presented by Andy Watt

SUMMARY This session will introduce the Goldratt UK's Rules of Flow for MRO (Maintenance, Repair, and Overhaul) - a recent advancement in Goldratt UK's implementation approach. Inspired by Efrat Goldratt-Ashlag's book 'Goldratt's Rules of Flow', the team at Goldratt UK has developed a straightforward 10-step framework tailored specifically for the MRO environment. After extensive field testing and refinement, they are excited to share this approach with the Theory of Constraints (TOC) community. During the session, Andy will present real-world client examples to illustrate the framework's practical impact and effectiveness.

SPEAKER BIO Andy Watt: Transformational Leader with 35+ Years of Expertise

Industry Focus: Production, Distribution, MRO, Supply Chain, Project Management

Track Record: 15 years in senior roles within the defense industry; over 30 years implementing Theory of Constraints (TOC) and Critical Chain Project Management (CCPM)

Career Highlights:

Andy joined The Goldratt Institute in 2000, delivering TOC training, coaching, and consulting. He worked directly with Dr. Eli Goldratt, applying TOC principles to solve critical business challenges. In 2007, he took over Goldratt UK, expanding TOC consultancy services across the UK. Under his leadership, the Goldratt UK team has implemented TOC and CCPM across hundreds of organizations worldwide.

90-Day Turnaround: Rapid Results in MRO through TOC Implementation

Presented by Sanjeev Gupta

SUMMARY In this session, Sanjeev Gupta walks through a powerful 90-day turnaround case study in the Maintenance, Repair & Overhaul (MRO) sector. Joined by a company executive, the session explores how a chronic performance problem was identified, addressed, and resolved using straightforward Theory of Constraints (TOC) principles.

Participants will hear firsthand about the specific challenge the organization was facing, the steps taken during implementation, and the measurable improvements that followed—often within weeks. This session will also highlight

the organizational alignment and leadership focus required to drive fast, effective change in complex operational environments.

Whether you're facing delays, excess backlog, or capacity constraints in your MRO operations, this session offers a practical blueprint for results—fast.

Solving MRO Challenges in Real Time: A 90-Day Turnaround Working Session

Presented by Sanjeev Gupta + Attendee Participation

SUMMARY This isn't just a case study—it's a working session. Join Sanjeev Gupta as he walks through a real-world 90-day turnaround in the Maintenance, Repair & Overhaul (MRO) sector, featuring a company executive who will share the original problem, the TOC-based implementation approach, and the results achieved.

Then, the session opens up to you.

Sanjeev will invite attendees to bring forward their own operational challenges—whether it's backlog, turnaround time, capacity constraints, or something else. Using the same TOC thinking process, he'll work live with participants to identify the core problem and outline a focused path to rapid improvement.

If you're responsible for MRO performance and ready to move from firefighting to breakthrough results, bring your challenge—and let's get to work

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Novel TOC Driven Approach to Prioritization and Execution of Complex Production

Presented by Rob Richards & Tim Cook

SUMMARY In some environments, traditional lean and TOC methodologies are insufficient for building and executing detailed schedules. In these cases, advanced software must be used with a new system of management to ensure priorities are defined and organizations are executing those priorities in the proper order.

Final Assembly of airplanes, fighter jets, and helicopters require coordination of thousands of employees to complete tens of thousands of tasks. These tasks have layered resource and calendar requirements and are connected with hundreds of thousands of sequence constraints. In this environment, streamlining processes, identifying the constraint, reducing waste, and continuously improving are not sufficient by themselves. Instead, they must be paired with software that can calculate and keep up with the evolution of the build. This is critical as disruptions

happen and the dynamic critical chain weaves in and out of tightly coupled feeder chains. That is, the 5 Focusing Steps are ongoing and the constraint may change every day, so all 5 focusing steps need to be performed at least once a day by the software. Using software, this schedule, with the global prioritized task list, is then delivered to all stakeholders in the manufacturing system to unite them around the same global priorities. Using these priorities everyone knows where to focus energy to reach the goal.

SPEAKER BIO Details Coming Soon!

TOC-Enabled Solutions: Technology & AI

TOC-Driven Manufacturing Excellence

Presented by Duncan Patrick & Jack Warchalowski

SPEAKER BIO Jack Warchalowski is the CEO of CMS Montera Inc. CMS Montera specializes in software and consulting that helps clients solve problems in Operations and the Supply Chain. Jack helps organizations enhance their profitability and competitive position through the implementation of strategic improvement initiatives driven by CMS RoadRunner software. Jack is a Certified Management Consultant and a Professional Engineer registered in Ontario. He holds an MBA degree from the Wilfrid Laurier University and a Bachelor of Applied Science in Mechanical Engineering from the University of Waterloo in Waterloo, Ontario. In addition, Jack is certified by the TOCICO in all aspects of TOC.

Duncan Patrick is Executive Vice President of CMS Montera Inc. CMS Montera specializes in software and consulting that helps clients solve problems in Operations and the Supply Chain. Duncan's business consulting career is focused on working with clients to assist them solve problems in operations and the supply chain related to lead times, the forecast, inventory, capacity, on time delivery, product development speed and market focus. Duncan holds an MBA degree from the Richard Ivey School of Business, Western University and a Bachelor of Commerce degree from The University of Calgary. Duncan is certified by the Theory of Constraints International Certification Organization in all aspects of TOC. In addition, Duncan is a Certified Management Consultant.

The Evolution of Critical Chain Software

Presented by Rob Newbold

SUMMARY While the basic concepts behind Critical Chain remain valid today, Critical Chain software has changed a lot over the past 30 years. In this presentation, Rob will talk about the evolution of ProChain's software and how they have managed the inevitable conflict between building capabilities while maintaining simplicity. How can you give users the ability to navigate the different situations they might encounter, while minimizing the difficulties they will have in learning to use the tools?

SPEAKER BIO Rob Newbold, CEO and founder of ProChain Solutions, is one of the world's leading experts on Critical Chain project scheduling and management. He has forty years' experience developing process improvements in various fields. Rob is a frequent writer and speaker and holds degrees from Stanford University, SUNY Stony Brook, and Yale University. He is the author of the books Islands of Stability (ProChain Press, 2019), The Project Manifesto (ProChain Press, 2014), The Billion Dollar Solution (ProChain Press, 2008) and Project Management in the Fast Lane (St. Lucie Press, 1998) and was a contributing author to the TOC Handbook from McGraw-Hill. He was presented with a TOCICO Lifetime Achievement award by TOCICO in 2023 and a TOC Excellence Award by TOCPA in 2024. ProChain Solutions has been a leading provider of software, methodology, and implementation services for Critical Chain solutions since 1997.

TOC-Enabled Solutions: Technology & AI

AI-Powered TOC: Accelerating Thinking Processes & Managing AI Task Tokenization

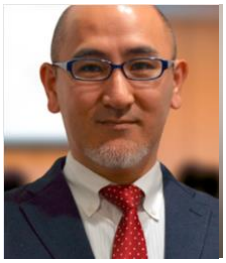
Presented by Gilseiley Daru

SUMMARY The TOC Thinking Processes (TP) are foundational for systemic problem-solving, yet their application can be manually intensive. This session dives into how AI agents are becoming powerful accelerators for TOC consultants. We'll demonstrate practical applications where AI assists in: Refining Verbalization: Clearly articulating UDEs and logical connections in Clouds and Trees. Speeding Up Root Cause Analysis: Rapidly structuring and validating logic in CRTs. Guiding Solution Development: Brainstorming injections for Clouds and evaluating NBRs for FRTs/PRTs. A central theme is the shift towards "Service-as-Software", where consultants leverage AI agents for complex analytical tasks. This introduces the concept of AI Task Tokenization: services are consumed in measurable units (tokens), directly translating to cost. We will emphasize that while AI offers immense productivity potential, effective utilization hinges on the consultant's expertise. Poorly constructed prompts or lack of domain understanding

leads directly to wasted tokens and budget without achieving objectives. This session provides insights into maximizing the value of AI in TP work while carefully managing its associated resource consumption.

SPEAKER BIO Gilsiley Henrique Darú provides Supply Chain consulting and optimization for major companies such as HAVAN (Retail - Supply Chain), HVLE (Railway Optimization in Germany), and Malwee (Fashion - Production Planning). He leads the AI and Supply Chain Innovation Lab at Neogrid Software, a leader in supply chain integration. With over 20 years of experience at firms including Datasul, WEG, and Malwee, he applies Artificial Intelligence and innovative solutions to transform corporate environments. At Neogrid, Gilsiley leads a team creating cutting-edge Supply Chain Management solutions, leveraging his expertise in data analysis and AI to turn data into valuable insights and enhance client operational efficiency. A Ph.D. candidate in Computational Mathematics (UFPR) and holding Master's degrees in Data Science (USP) and Numerical Methods (UFPR), Gilsiley also has degrees in Mechanical Engineering and Data Processing (UDESC), plus postgraduate qualifications in Data Science (SENAI) and Software Engineering (PUC-PR). An enthusiast of the Theory of Constraints and Optimization in Industrial Planning, he helps companies find focus and improve flow using the TOC Thinking Processes alongside optimization tools like Operations Research, Discrete and Continuous Simulation, and Agent-Based Modeling, with strong expertise in Logistics and Business Planning. Academically, he shares his knowledge as a Postgraduate Professor in AI & Deep Learning. Gilsiley values collaboration and the continuous development of advanced analytical skills in all his initiatives.

TOC-Enabled Solutions: Technology & AI



Democratizing TOC Thinking Processes via Generative AI and AI Agents

Presented by Hirotsugu Nakai

SUMMARY This research aims to make the TOC Thinking Processes (TP) accessible to everyone through the use of generative AI. Last year, a prototype was introduced that combined Retrieval-Augmented Generation (RAG) and prompt chaining techniques to allow non-experts to create UDEs and CRTs quickly. This year, three major enhancements were made: A dialogue-based interface enabling sequential question-answer interaction for TP construction. An AI agent that collects and applies industry-specific knowledge to enrich insights. Reconstruction of the system as a GPT app for broader deployment. These upgrades further reduce the entry barrier to TP and promote faster, more inclusive problem-solving. The session will showcase the updated system and discuss its implications for the future of TOC.

SPEAKER BIO Project Director at Progressive Flow Japan Ltd., where he leads strategic initiatives in business process design, new business development, and production system optimization. After completing his graduate studies, he began his career at a major patent law firm and later joined a company operating a restaurant search and reservation platform. There, he served as Head of the President's Office and Chief Researcher, launching new ventures and internal research institutes. He has extensive experience as a consultant in the Theory of Constraints

(TOC), including the implementation of Critical Chain Project Management (CCPM) across diverse industries, as well as business process improvement and innovation support. He later served as an executive officer at an AI-focused company, where he was engaged in the development of digital transformation (DX) and AI solutions. Since 2020, he has been involved in managing a wide range of projects from initiation through delivery. He has also served as a part-time lecturer at Tokyo Institute of Technology and as a review committee member for government-led venture investment programs.

TOC-Enabled Solutions: Technology & AI

Utilizing Theory of Constraints and System Dynamics with AI to Enhance PTSD Research Collaboration

Presented by Christophe G. Lambert, Ph.D., Don Greer & Alexandria Viszolay

SUMMARY This session presents a solution that combines AI-enhanced Theory of Constraints and System Dynamics modeling for organizations seeking deeper system understanding and aiming to overcome complex, persistent problems in healthcare.
This session will highlight:
Strengths and limitations of AI for enhancing systems thinking
How TOC and System Dynamics offer complementary system understanding
A deeper understanding of how PTSD is shaped by personal, social, and system-level variables
The impact of visual models on social construction

SPEAKER BIO Christophe G. Lambert, Ph.D., is a Professor of Medicine and Division Chief of Translational Informatics at the University of New Mexico. He is also the founder, past CEO and current Chairman of Golden Helix, a Bozeman-based bioinformatics company. Throughout his career, he has applied systems thinking to the challenging problems affecting life sciences and healthcare research, with numerous articles and presentations diagnosing systemic problems and prescribing the change management required for improvement. As a lifetime TOCICO member, certified in the Theory of Constraints (TOC) Fundamentals (2004) and Thinking Processes (2006), he applied TOC within his own company for a decade, and currently applies it to problems in mental and organizational health. Originally from Canada, Dr. Lambert received his bachelor's degree from Montana State University, and a PhD in computer science from Duke University.

Don Greer is a methodologist and facilitator focused on enhancing organizational performance by addressing challenges within sociotechnical systems. He applies systems thinking and dynamic modeling to diagnose root causes and design interventions, as demonstrated in his work on U.S. Air Force program disconnects and developing a buffalo herd management model that illuminated complex interdependencies. His expertise lies in translating

these insights into actionable strategies, facilitating collaboration, and guiding organizations through the implementation of robust solutions to achieve breakthrough results.

Alexandria Viszolay is a third-year medical student at the University of New Mexico School of Medicine and a graduate research assistant in the Division of Translational Informatics. She holds a BS in Biochemistry with Honors from the University of New Mexico, where she later served as a curriculum coordinator in the Department of Biochemistry and Molecular Biology. Alexandria is student representative to the medical school administration, a Learning Communities leader, President of the Oncology and Hematology Student Chapter, and a member of the National Community of Scholars. Her scholarly interests focus on the application of systems thinking to clinical practice and healthcare delivery through innovative, interdisciplinary approaches.

TOC-Enabled Solutions: Technology & AI

AI: The Future of Thinking

Presented by Wolf McNally

FLYING LOGIC

SUMMARY Wolf McNally has spent four decades turning audacious ideas into software that reshapes how people think. As the creator of Flying Logic, he made the visual language of the Theory of Constraints accessible to strategists from Fortune 500 firms to solo consultants. He also leads research at Blockchain Commons, developing open-source protocols for digital autonomy.

In this session Wolf traces Flying Logic's evolution as a decision accelerator, then confronts the elephant on every strategic planner's whiteboard: artificial intelligence. He compares the way large models reason with the way humans think, exposes the cognitive terrain AI cannot cross, and shows how TOC practitioners can ride the wave instead of becoming the constraint. He closes with a glimpse into his research for next-generation AI-integrated TOC tools.

SPEAKER BIO Wolf McNally began his career at the dawn of the 8-bit era in Silicon Valley, writing games like *Sega's Star Trek* and *Activision's Ghostbusters*, and has been creating visual, intuitive tools ever since. His career has spanned a wide range of inventive projects at the intersection of technology and creativity—from co-founding the early game studio *The Dreamers Guild,* to helping launch the award-winning construction toy company *PixelBlocks*. He's worked on color-shifting lighting for concept cars, large-format touchscreens, and early gestural interface systems - contributing code that made its way into the technology behind *Minority Report*. Wolf wrote eHarmony's first iPhone app, and contributed fictional UI designs used for the whiteboards on an episode of *The Big Bang Theory*.

For nearly a decade, Wolf has served as Lead Researcher at the nonprofit Blockchain Commons, where he's invented open standards such as *LifeHash*, *Deterministic CBOR (dCBOR)*, and *Gordian Envelope*, all focused on strengthening digital sovereignty. His work with the Theory of Constraints began years before Northrop Grumman brought him in to

build a visual tool for Course of Action (COA) analysis—a project that evolved into *Flying Logic*, now widely used by TOC practitioners around the world.

Across all his work runs a consistent thread: thoughtful, well-crafted systems that support better thinking and decision-making. Wolf's goal is to help people move past *what* they've been taught to think—and develop mastery of *how* to think.

TOC-Enabled Solutions: Technology & AI

Using TOC Thinking Processes in AI Adoption

Presented by Thorsteinn Siglausson

SUMMARY Successful adoption of AI (Large Language Models) requires a clear goal aligned with the overall objective of the organization. At Statistics Iceland, a Goal Tree was used to develop an AI adoption strategy for the organization. A set of Evaporating Clouds helped resolve the conflicts that typically arise when implementing new technology—particularly when expected usage, benefits, and outcomes are not yet clear. Finally, a Future Reality Tree was used to map how the proposed solution and strategy would lead to the desired outcome: successful AI adoption.

Attendees will gain an understanding of how a government organization can apply TOC Thinking Processes to build and implement a robust AI strategy.

SPEAKER BIO Thorsteinn Siglaugsson is an accomplished independent strategy consultant and corporate trainer, specializing in improving performance and guiding C-level executives. With a focus on clarifying focus, identifying core issues, and developing robust strategies, he assists management in overcoming obstacles to success. Thorsteinn employs the methodology of the Theory of Constraints and the Logical Thinking Process to analyze and address constraints, conflicts, and underlying issues, providing a solid foundation for sustainable results. Since 2006, Thorsteinn has worked with numerous companies across various industries, offering his expertise in planning, forecasting, budgeting, software project management, and implementation. As an independent strategy consultant, he has undertaken diverse projects including analysis and improvement, strategy formulation, process enhancement, asset valuation, and IT implementation. Additionally, as an independent corporate trainer, Thorsteinn has conducted training programs on planning, budgeting, and the Logical Thinking Process for educational institutions and companies. Thorsteinn holds an MBA from INSEAD and a BA in Philosophy from the University of Iceland. He has acquired certifications such as the Goal Systems International Certificate of Mastery in the Logical Thinking Process. In addition to his work, Thorsteinn actively contributes to the field, publishing insightful articles and research essays in various local and international publications. He is a board member of Excellence Iceland, serving in the Strategy and Performance Management Group, and chairs the Icelandic Free Speech Association. Thorsteinn also participates in the Artificial Intelligence Group as a board member.

TOC-Enabled Solutions: Technology & AI

Intersection of TOC, AI, IT and Flow to Improve Risk Management

Presented by Daniel P. Walsh

SUMMARY Current CCPM planning and scheduling risk management metrics are not fully leveraging the capabilities of newly available technologies. To remain relevant, the Theory of Constraints must adapt to incorporate these advancements.
This session will offer a deeper understanding of the limitations of existing CCPM risk management metrics and explore why updating them is critical in today's evolving technological landscape.

SPEAKER BIO Daniel Walsh is a sought-after lecturer, coach, strategic thinker and is a trusted advisor to many senior corporate executives, is currently a member of numerous corporate boards. In addition, he is co-founder of Exepron©, an advanced EPPM SaaS solution based on Critical Chain methodology. His current efforts are focusing on developing synchronous enterprise value chain solutions in multiple industry sectors. His research and development are centered on identifying the need to identify and leverage the strategic constraints of the enterprise, which is the key to increasing throughput. This culminated in the development of the Integrated Enterprise Scheduling®, (IES®) solution engine. Initial empirical results from deploying the IES® in a dozen large companies over a five-year period have been very promising. Many executives and thought leaders are convinced this may very well be the unified scheduling solution required for maximizing the profit of an enterprise-wide value chain. The IES approach was chronicled when he co-authored The TOC Handbook, the seminal Theory of Constraints reference textbook.

TOC Adoption: The Wills and the Won'ts (why isn't TOC widespread?)

Presented by Humberto Baptista

SUMMARY After nearly four decades of delivering impressive results across diverse sectors, the Theory of Constraints (TOC) has more than proven its worth. Yet, despite this track record, TOC remains far from mainstream. Why is that? Why is it so difficult to "sell" TOC to decision-makers, and why do so many implementations stall—failing to spread even within the organizations that initiate them? This session explores possible reasons behind this paradox, including those already proposed and one often-overlooked factor: TOC's very uniqueness. We'll examine

how this uniqueness, while a strength, may hinder its natural adoption path. We'll then introduce a fresh explanation, structured around three critical phases: consideration (marketing), acceptance (sales), and persistence (ongoing improvement or POOGI). Each phase brings its own set of hurdles—and opportunities. We'll close by proposing a way forward: a structured approach to help TOC spread faster, further, and more sustainably than ever before.

SPEAKER BIO Humberto R. Baptista is a strategic thinker, innovator, and Synergist, serving as CEO of Vectis Solutions. A recipient of the TOCICO Lifetime Achievement Award (2019), he has spent decades shaping how organizations think, decide, and perform. Humberto was a strategic advisor to Neogrid, a member of the TOCICO Board of Directors, and a senior figure in the Goldratt Group. He has led major Viable Vision transformations across sectors—from consumer goods and retail to manufacturing, services, and large-scale projects—delivering tangible, systemic breakthroughs. As a global educator, he has trained hundreds of TOC Viable Vision Application Experts and Project Leaders. Humberto is the creator of the Comprehensive Management methodology, designed to connect local actions with global consequences in real-world business systems. His current focus includes Comprehensive Management, TOC Principles, S&T-based implementations, advanced TOC Finance, and applying TOC to complex domains like retail, government, health, and education.

Critical Chain & Coaching: Because Businesses Deserve Better Than Chaos

Presented by ***Julija Lobaskina***

SUMMARY Many organizations are stuck in a cycle of chaos—multitasking, missed deadlines, and misaligned teams. This session offers a bold alternative: the powerful combination of Critical Chain Project Management (CCPM) and business coaching. Discover how this approach replaces firefighting with flow, and stress with structure. Learn to challenge harmful assumptions around task estimates, buffer management, and resource use—while cultivating team commitment, clarity, and trust. Through practical insights and real-world examples, you'll explore how to foster accountability without blame and drive performance without burnout. This session is ideal for leaders, project managers, and change agents ready to transform the way their organizations work. Because businesses deserve more than survival—they deserve clarity, focus, and results.

SPEAKER BIO Julija Lobaskina is a project manager and business coach who views her work not just as a profession, but as a way of life. With a strong background in process and project management, she currently leads R&D projects at a manufacturer of air handling and ventilation systems, while also managing her family business. Throughout her career, Julija has led the implementation of Critical Chain and Lean practices across multiple organizations—transforming operations in both construction and production companies, and contributing to the development of major business centers, production facilities, and residential buildings in Vilnius.
Her expertise spans both consultancy and in-house transformation, having continued this work within a single construction and production company. Julija brings a rare blend of strategic insight and hands-on experience, making her a dynamic voice in the conversation on performance and organizational change.

Government & Public Sector

Plenary Session with Kristen Cox

Presented by Kristen Cox

SUMMARY Details Coming soon

SPEAKER BIO Director Kristen Cox is a visionary leader, author, and expert in systems thinking and constraints management, specializing in helping governments and nonprofits cut through complexity and achieve breakthrough results. Best known for orchestrating a 35% measurable improvement in the State of Utah's $20 billion executive branch, Kristen has a proven track record of transforming large-scale operations by focusing on what truly matters.

As the Founder & CEO of Epiphany Associates, LLC, Kristen brings her expertise to organizations worldwide, guiding leaders to eliminate inefficiencies, maximize impact, and drive sustainable change. She has served as an Executive Director, university instructor, Senior Fellow, advisory board member, keynote speaker, trainer, and consultant. She co-founded The Fulcrum and created Utah's SUCCESS Framework and the Quality Throughput over Operating Expense (QT/OE) metric, both of which have been widely recognized for driving government effectiveness.

Kristen is also the co-author of Stop Decorating the Fish, a powerful business fable that exposes ineffective problem-solving strategies often used in government and business. The book, co-written with TOC expert Yishai Ashlag, helps leaders recognize and avoid misleading solutions that create the illusion of progress but fail to address core issues.

Beyond her professional expertise, Kristen's personal journey as a blind leader adds depth to her work. She weaves together inspirational lessons on resilience, innovation, and clarity of thought, helping others develop the discipline to focus on real solutions that drive meaningful impact.

Government & Public Sector

Governing for Quality of Life: Resolving Chronic Conflicts through TOC Thinking

Presented by Alfredo MyCue, Eli Schragenheim, Andrew Kay & Guido Bacharach

SUMMARY Assuming that the general goal of government is increasing the quality of life—now and in the future, this presentation examines the persistent constraints that prevent governments from reliably achieving that aim. Governments operate in a complex and demanding environment shaped by limited resources, volatility, uncertainty, competing priorities, and deep ideological divides. These persistent constraints—distinct from day-to-day

obstacles—are recurring sources of systemic tension that must be identified, categorized, and addressed if meaningful progress is to be made. The analysis is built on the shoulders of government thought leaders applying the Theory of Constraints (TOC) to public systems, including Kristen Cox (Results Management in government operations), Alan Barnard (Strategy and decision science), and Rami Goldratt (TOC implementation in national systems). Using TOC thinking tools—especially the Evaporating Cloud and the concept of oscillating conflicts—we will surface the most impactful and recurring constraints that governments face across the tactical (service), operational (agency), and strategic (political) levels. We use conflict categories and also look at budget conflicts and how they can be resolved. We will then focus on one or two of these chronic conflicts for deeper examination, analyzing their underlying assumptions and proposing potential injections to dissolve them. In the spirit of John Dewey's insight that "a problem well-defined is half-solved," this session aims to strengthen the conceptual foundation for applying TOC to governance—clarifying constraints that obstruct progress and creating a path toward greater societal well-being through deliberate and measurable improvement.

SPEAKER BIO Alfredo is the Co-Founder of ReEngine Consulting and a PhD candidate at George Washington University in Washington, DC. He has been a military commander, diplomat, and assistant professor of history at West Point Military Academy. He has held positions at the federal, state, and city level as a public executive and an improvement expert. He has worked to improve procurement and contract management at all those levels of government and in universities.

Andrew is a leading TOC Practitioner based in Sydney and founder of TOC3 Pty Ltd, a boutique consulting firm serving the Asia Pacific. With nearly 20 years of TOC experience, he has led or supported over 85 successful implementations across diverse industries in Australia, New Zealand, Singapore, Indonesia, Japan, and the USA. He is proficient in all TOC application areas, including the Logical Thinking Process, and specializes in rapid, visual implementation methods. Andrew is an active member of the international TOC community, sharing his insights through case studies at TOCICO and other global conferences. He also serves as Director of TOC for Education Australia, helping bring TOC thinking tools to schools and communities. Before his TOC career, Andrew held senior roles in strategic planning, GIS, and business improvement across government and private sectors. He holds a BSc (Hons) in Applied Science, an MBA from Macquarie University, and is a TOCICO-certified Jonah+ and CCPM IC3PM instructor.

Government & Public Sector

On the Horns of a Dilemma: Using TOC to Make Better Insource vs. Outsource Decisions in Government

Presented by Alfredo Mycue

SUMMARY To contract or not to contract remains a fundamental conflict in the public sector. This analytical paper and presentation uses empirical research to explore the benefits of using Theory of Constraints (TOC) tools and methods in the world of public sector procurement to make better "make or buy" decisions, manage contractors to success, and ultimately produce more quality public value per tax dollar.

SPEAKER BIO Alfredo is the Co-Founder of ReEngine Consulting and a PhD candidate at George Washington University in Washington, DC. He has been a military commander, diplomat, and assistant professor of history at West Point Military Academy. He has held positions at the federal, state, and city level as a public executive and an improvement expert. He has worked to improve procurement and contract management at all those levels of government and in universities.

TOC + Healthcare

How to fix your ER (& Hospital) using TOC + Lean

Presented by Jeffrey Dryer, MD

SUMMARY Session will describe the factors causing this 38 year old problem of ED overcrowding to persist. Toc is the solution to the problem as it finds the constraint, which in hospitals and emergency departments is a staffed bed. This presentation will show how using buffer management can help alert staff and management when to focus on constraint management and find hidden opportunities to exploit the constraint.

SPEAKER BIO Dr. Dreyer is a board-certified Emergency Physician residing in Columbus, Ohio. For more than 20 years, Dr. Dreyer practiced at two high volume ERs and was director of ER quality. In 2003, Dr. Dreyer pivoted roles to facilitate quality initiatives at all 5 Mount Carmel Emergency Departments. Dr. Dreyer believes that patient health is directly correlated to the health of the operational system that delivers care. He is Six Sigma and Lean certified, is a Certified Professional in Healthcare Quality and the graduate of the Physician Executive MBA Program (PEMBA) at the University of Tennessee. As a Healthcare Optimization Professional, Dr. Dreyer has been transforming Emergency Department operations since 2001. As a result of his leadership, ED's have annually realized millions to their bottom line. In 2015, he formed The Dreyer Group, a healthcare services and software company that employs proprietary systems, processes, tools, and software, designed to improve hospital operations to deliver best in class quality, satisfaction, and revenue. Dr. Dreyer formed CarePulse, a patented software analytics platform.

TOC + Healthcare

90-Day Turnaround: How One Healthcare Leader Unlocked Breakthrough Results

Presented by Sanjeev Gupta

SUMMARY What does it take to lead real, measurable change in healthcare—without adding more initiatives or burning out your team?

In this executive-level case study, a healthcare CEO shares how they partnered with TOC expert Sanjeev Gupta to identify the true constraint in their system—and how that insight led to a focused 90-day effort that delivered major results. You'll hear what changed, how decisions were made, and what leadership practices enabled rapid alignment across departments.

This is not a story about adding resources or technology. It's about doing more with what you already have—and creating momentum that sustains long after the 90 days are over.

TOC + Healthcare

Live Working Session: Applying a 90-Day Turnaround Approach in Healthcare

Presented by Sanjeev Gupta

SUMMARY Every hospital has one issue that slows everything else down. In this interactive session, Sanjeev Gupta will guide participants through a focused problem-solving process inspired by real healthcare leaders who achieved dramatic results using a 90-day turnaround approach.

Bring a real challenge from your organization—whether it's patient flow, diagnostics, or scheduling—and work through it live to uncover the core constraint and outline a path to rapid, meaningful improvement.

Questions on how to participate? Email events@tocico.org

TOC + Healthcare

Using Data Analytics to Improve Emergency Department Throughput

Presented by Joseph Portale & Kyle Wasserman

SUMMARY This session addresses patient throughput challenges in the post-COVID Emergency Department—issues shared across the country that directly impact patient care. Using data analytics and AI, the team uncovered key resource constraints and aligned provider, nursing, and ancillary staff around patient flow. This approach led to measurable improvements in efficiency without adding resources, including reductions in Left Without Being Seen, Length of Stay, and enhancements to the overall patient experience. The session will outline the process and outcomes to support other departments in exploring similar interventions.

SPEAKER BIO Dr Portale is Board Certified in Emergency Medicine with over 15 years of clinical experience. He trained at Jefferson University Hospital in Philadelphia, and obtained a Masters of Science in Public Health. He has held various academic and leadership positions and is currently Chair and Medical Director for Capital Health Emergency Department System in Trenton NJ. He has a strong interest in quality improvement and medical education.

Kyle Wassermann is the Medical Director of Analytics, Associate Medical Director (Emergency Department), Emergency Medicine Physician

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TOC+ Healthcare

Keep from Falling Through the Cracks: Reducing Patient Falls Through Constraints Management and High Reliability — From Patient Bedside to Boardroom

Presented by Bahadir Inozu Binozu

SUMMARY Patient falls continue to pose persistent and costly challenges to healthcare systems worldwide, contributing to adverse patient outcomes, prolonged hospital stays, and increased resource use. Despite decades of effort, the frequency of falls highlights the need for a more focused and systemic approach. This study applies Constraints Management and High Reliability Organization (HRO) principles to reduce inpatient falls in collaboration with the Ministry of Health of Türkiye at Ankara Etlik City Hospital—a state-of-the-art facility with over 4,050 beds. Using the Theory of Constraints (TOC) Five Focusing Steps, the team identified key system constraints and implemented targeted interventions. In this pilot study, three-month control period following implementation showed measurable reductions in falls and related harm. Nevertheless, sustaining and scaling these improvements has proven to be challenging, largely due to factors such as heterogeneous patient risk profiles, fluctuating staff practices, inconsistent data quality, and the operational complexity inherent to

large hospital systems. To address ongoing challenges with sustaining and replicating improvements, the Cynefin Framework is being considered to guide decision-making that reflects the varying levels of complexity in fall-related scenarios. The Cynefin framework distinguishes ordered from unordered domains; in complex and chaotic contexts, patterns must be sensed, and solutions emerge through experimentation. This differentiation supports more effective governance by aligning interventions with the nature of the situation—avoiding over-standardization in complex domains and enabling rapid response in chaotic ones. Concurrently, the initiative reinforces the core principles of High Reliability Organization (HRO), particularly preoccupation with failure, sensitivity to frontline operations, and commitment to resilience. Teams were encouraged to anticipate failure modes, respond to weak signals, an engage subject matter experts closest to the work to shape realistic, sustainable solutions. These behaviors were essential I reducing variation in fall prevention practices across departments and shifts. However, sustaining gains requires more than behavioral discipline. It depends on robust data quality and sufficiency—including timely, narrative-rich, and context-aware reporting that goes beyond binary metrics. Data sufficiency also includes the presence of both leading and lagging indicators that can inform learning from both success and failure. By combining Constraints

Management, HRO behaviors, and Cynefin's situational awareness lens, this integrated approach offers a practical, adaptive model for improving patient safety and operational reliability in dynamic healthcare environments, while building the foundations for long-term learning and system-level resilience.

SPEAKER BIO Dr. Baha Inozu is the cofounder and CEO of Sharp Focus, Inc., and a faculty member at the University of Southern California. He has collaborated with more than forty organizations to improve performance and reliability across a range of sectors. Internationally recognized for his expertise in system reliability and performance improvement, Dr. Inozu specializes in integrating leading methodologies to achieve high-impact outcomes. He currently supports the SafeMTS project as a Subject Matter Expert and contributes to the Shipyard Infrastructure Optimization Program (SIOP) for the U.S. Navy.
His research centers on identifying and applying best practices from high-risk industries to advance safety and reliability. He is the co-author of High Reliability for a Highly Unreliable World. Previously, he served as CEO of NOVACES and as Chairman of the School of Naval Architecture and Marine Engineering at the University of New Orleans.

TOC in Mining

90-Day Turnaround: Breakthrough Performance in Mining:

Facilitated by Sanjeev Gupta

SUMMARY When operations stall, adding more resources rarely solves the real problem. In this session, an industry leader from the mining sector shares how their organization partnered with Sanjeev Gupta to identify the true constraint in their operation—and deliver measurable results in just 90 days.

Hear how this focused, data-driven approach improved flow, increased output, and aligned teams across functions. This session offers a firsthand look at how TOC principles, when applied with discipline and speed, can create powerful momentum—even in highly complex industrial environments.

TOC in Mining

Live Working Session: Applying a 90-Day Turnaround Approach in Mining

Facilitated by Sanjeev Gupta

SUMMARY Every mine faces at least one critical constraint that limits throughput, drags down efficiency, or stalls performance. In this interactive session, Sanjeev Gupta guides participants through the same structured approach used to deliver 90-day turnarounds in real-world mining operations.

Attendees are invited to bring a current operational challenge and work through it live—whether it's equipment availability, material flow, staffing, or shift transitions. The goal: uncover the real constraint and identify the actions that can unlock significant gains, fast.

Questions on how to participate? Email events@tocico.org

TOC in Mining

Systemic Alignment as a Catalyst for Enterprise and Societal Transformation: A Case Study from Comstock Inc.

Presented by Kevin Anthony, COO Belgotex

SUMMARY A compelling case study from Comstock Inc., revealing how a holistic, systemic application of Theory of Constraints and the Theory of Profound Knowledge transformed its strategic planning, execution, and organizational development into a repeatable engine of globally impactful innovation. CEO Corrado DeGasperis explores how alignment, empathy, reliability and constraint-based management systems enable transformative results.

SPEAKER BIO Corrado De Gasperis is Executive Chairman and CEO of Comstock Inc., where he leads innovation in global systems deployment for clean energy solutions. With over 30 years of leadership in industrial-scale materials and advanced manufacturing, he has guided Comstock to develop two breakthrough, commercial ready technologies operating at or near TRL 7: an organosolv-based process that more than doubles known, practical renewable fuel yields from waste wood (140 gallons per dry ton versus the 60-gallon industry average), and a solar panel recycling system that achieves 100% reuse of recovered materials—aluminum, glass, and silver-rich tailings—without harmful emissions. A champion of systemic thinking, De Gasperis integrates Theory of Constraints methodologies to drive innovation and commercialization. At GrafTech International, his leadership generated hundreds of patents and five consecutive R&D 100 awards, including technologies including next generation thermal spreaders for advanced electronics and graphite electrodes that resolved the costly down times in electric arc steel recycling. He founded Comstock's Odyssey Leadership Program, which has trained over 60 emerging professionals in systemic strategic planning, execution, conflict resolution and purposeful, sustainable innovations. These participants lead real-world projects in decarbonization and electrification, with many joining Comstock or other clean energy leaders. An experienced speaker, De Gasperis delivered the TEDx Talk "Capitalism Lost: The Systemic Road to Discovery" and frequently engages audiences—from executives to students—on integrating sustainability, innovation, and systems thinking. Comstock's systemic approach has led to integrated alliances with companies, laboratories and universities, including collaborations with Hexas Biomass Inc., RenFuel K2B AB, Marathon Petroleum Inc., the National Renewable Energy Lab ("NREL") and MIT, all systemically advancing clean technologies at scale.

TOC in Action: Supply Chain, Manufacturing & Industry

Applying the Theory of Constraints: Insights from Neogrid

Presented by Miguel Abuhab

SUMMARY Session details coming soon!

SPEAKER BIO Miguel Abuhab is a mechanical engineer, who graduated from ITA - Aeronautics Institute of Technology. In 1999, he founded NeoGrid, a provider of Supply Chain Management (SCM) software solutions, which has become a leading provider in Brazil, listed on the stock market in December 2020. Currently holds the position of Chairman of the Board.

Since 2003, Abuhab has worked on its Tax Simplification Plan for Brazil - Abuhab Model of VAT Collection - which served as the basis for the Tax Reform Report approved in December. In 2019, he presented his Plan to the CCJ - Constitution, and Justice Commission, which amends the National Tax System. About the subject, he wrote books that address tax reform to unlock Brazil and sustain growth and social inclusion.

Abuhab is an advocate of Eliyahu Goldratt's ideas, incorporating in his business expertise the Theory of Constraints (TOC) and ideas related to the supply chain He also works strongly in social responsibility projects, focused on education. The TOCfE (TOC for Education) program, sponsored by the Miguel Abuhab Institute (IMA), has trained 200 volunteer teachers in 20 public and private schools in Joinville, serving more than 5,000 children.

TOC in Action: Supply Chain, Manufacturing & Industry

Success Story Presented by Belgotex

Presented by Kevin Anthony, COO Belgotex

SUMMARY Session details coming soon!

SPEAKER BIO Details Coming Soon!

What's a Goldratt? How We Found the One Constraint That Changed Everything

Presented by Val King, CEO Whitehat Virtual Technologies

SUMMARY It started with a Google search: "What's a Goldratt?" What followed transformed not just project delivery—but an entire company.

In this fast-paced, story-driven talk, Val King shares how discovering the Theory of Constraints turned chaos into clarity. After years stuck at 70% on-time delivery (even with Agile and Scrum), his team reached 94% using Critical Chain—and from that success came a bigger realization: the same thinking could fix everything else.

This is a talk about seeing what others miss. Whether you lead a law firm, hospital, IT shop, or small manufacturing business, you'll learn how to find your real constraint, protect it, and turn work into flow. Along the way, you'll hear how a Google search, a war room of sticky notes, and one clarified constraint helped change not just project delivery—but the entire culture of a company.

You'll leave with one action you can take Monday—and a radically different way of seeing how work really gets done.

SPEAKER BIO VAL KING , CEO of Whitehat Virtual Technologies and Ascent-Portal.com.

Whitehat Virtual Technologies is a nationally ranked top 100 technology services provider serving clients in North America, Europe, and Asia Pacific, specializing in security, compliance, desktop virtualization, cloud, hosting, and managed IT services. The Ascent Security Compliance Portal is a secure, real-time, collaborative web-based platform helping SMB organizations manage their Governance, Risk, and Compliance risk across 50+ frameworks of controls, including HIPAA, HITECH, NIST, ISO 27001, etc. Modules include: Assessment & Compliance, Governance, Risk Assessments, Business Continuity, Cybersecurity, Vendor Management, Audit Management, Security, Training, and Reporting. As CEO of Whitehat Virtual Technologies, founded in 2012, and Ascent Portal, founded in 2015, Val is responsible for day-to-day operations and leading product development and Technology strategy.

Val consults with client leadership teams outside of day-to-day operations to help them understand and manage IT from the C-Suite, secure their organizations, and extract maximum value from their IT investment.

Val embraces an unconventional approach towards IT Operations, prioritizing user experience over infrastructural excellence as the key IT operations benchmark. In today's fractured cybersecurity landscape, Val stands apart, advocating for collective action over solitary pursuits. Val states that isolated investments in security by individual companies are not sufficient to ward off advanced, organized cybercrime organizations. Val lives in Austin, Texas, with his wife, and father of two daughters.

Val King has 25 years of experience in technology, compliance, and security, all in regulated industries, particularly in financial services and healthcare. Val has served as the Virtual Chief Information Technology Officer for both a Regional Bank (2017-2023) and a Regional Hospital System (2014-2019). Val King's reputation extends beyond his business accolades. As a speaker, his insights, distilled from years of firsthand experience, offer a unique window into the opportunities and trials of the digital age. His engagements span numerous conferences and workshops,

providing audiences with actionable knowledge and an enriched understanding of IT and security's evolving landscape.

Val frequently speaks on topics including:

Establishing Functional Hybrid/Work-from-Home Strategies

Managing Cybersecurity Risk & Building Resilient Cybersecurity Programs

C-Suite Oversight and Responsibility with Cybersecurity

Simplifying IT Management for the C-Suite

TOC in Action: Supply Chain, Manufacturing & Industry

The Theory of Constraints: A Necessary Framework for Effective Digital Technology Integration

Presented by Thomas Mazzone

SUMMARY The Theory of Constraints: A Necessary Framework for Effective Digital Technology Integration

The integration of advanced digital technologies presents both significant opportunities and considerable challenges for modern organizations. While these technologies promise enhanced efficiency, innovation, and customer engagement, their successful adoption is often hindered by various obstacles, including legacy systems, resistance to change, and a lack of strategic vision. The Theory of Constraints (TOC), a management philosophy centered on identifying and alleviating the most critical limiting factor (constraint) within a system, offers a powerful framework to navigate these complexities. This paper explores the core principles of TOC and its five focusing steps, demonstrating how they can be strategically applied to address the specific bottlenecks that impede the effective integration of digital technologies. Through practical examples and real-world case studies of companies, this analysis highlights TOC's ability to prioritize efforts, optimize resource utilization, and foster a continuous improvement mindset in the context of digital transformation. By focusing on the constraint, organizations can ensure that their investments in advanced digital technologies yield maximum throughput and contribute directly to achieving their overarching business goals. You'll leave with one action you can take Monday—and a radically different way of seeing how work really gets done.

SPEAKER BIO Professor Tom Mazzone, has gained experience as an executive leader and educator across both industry and academic settings. At NYU Tandon School of Engineering, he guides the Industrial Engineering program, with a focus on operations and supply chain strategy, systems analysis, and business transformation and continuous improvement.

Professor Mazzone's professional journey includes senior roles at organizations such as Ernst and Young, A.T. Kearney, Fidelity Investments, and Royal Bank of Scotland, where he was involved in significant technology and operational change initiatives.

His current research interests include exploring the challenges of implementing digital supply chain transformation,

developing new models to support organizational change, and examining the integration of the Theory of Constraints with Lean Six Sigma to enhance outcomes, particularly within healthcare systems.

TOC in Action: Supply Chain, Manufacturing & Industry

Enhancing Manufacturing Efficiency and Quality Compliance Through TOC: A Practical Approach for Sheet Metal and Tooling Industries

Presented by Pramod Patil, Geektool Engineering Pvt ltd

A Word For Innovation

SUMMARY This session explores the practical application of TOC in optimizing manufacturing efficiency, reducing constraints, and improving quality compliance in sheet metal fabrication and tooling industries. Learn how TOC principles, combined with lean and digital technologies, can drive operational excellence and ensure adherence to VDA 6.3, ASES, and JD Audit quality standards.

SPEAKER BIO Pramod Patil is the CEO at GeekTool Engineering Pvt Ltd, specializing in sheet metal fabrication, tooling solutions, and lean manufacturing. With extensive experience in ASES Certification, VW Audit compliance, and quality system implementation (VDA 6.3, JD Audit, and ASES), Pramod has worked with automotive, farm equipment, forestry, and construction equipment customers. Passionate about operational excellence, bottleneck reduction, and TOC-based manufacturing strategies, Pramod actively contributes to industry knowledge-sharing initiatives.

TOC in Action: Supply Chain, Manufacturing & Industry

Success Story presented by Harkesh Rubber

Presented by Darshan Shah, Managing Director of Harkesh Rubber

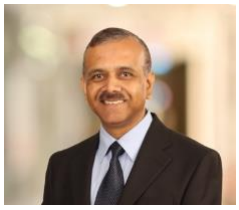
HARKESH RUBBER

SUMMARY Session details coming soon.

SPEAKER BIO A passionate and visionary entrepreneur, with over 18 years of expertise in critical rubber components for industrial precision use, Darshan Shah is a second-generation leader committed to carrying forward his family's rich legacy. The family business began its journey in 1983 with just two hand-press machines operating from a rented space in Goregaon. This humble start laid the foundation for what would later become Harkesh Rubber LLP, incorporated in 2015. As the head of a mid-size firm, Mr. Shah has successfully managed to strike a balance between catering to the growing needs of the industry and being agile enough to make rapid internal changes when required. He firmly believes in constant improvement, striving to do things better, faster, and bigger. Mr. Shah's

ultimate vision is to put India on the world map for its quality products. Continuing his journey of personal and professional growth, Darshan Shah is currently pursuing the prestigious Stanford Seed Graduate program, indicating his unwavering commitment to acquiring knowledge and expanding his entrepreneurial skills. He has served as the ex-president of the Leo Club of Juhu, highlighting his dedication to serving others and making a positive impact in the community. His notable achievements include an invitation to one of the top three clubs in the United States.

TOC in Action: Supply Chain, Manufacturing & Industry



Protect availability and improve product freshness in distribution systems using AI/ML in Demand Sensing and Dynamic Buffer Targeting

Presented by Dr. Rakesh Sinha

SUMMARY Buffer targets in TOC implementations use past patterns of consumption data and are often inadequate to protect availability against demand shifts caused by predictable demand drivers. The proposed dynamic buffer targeting, using AI/ML in demand sensing, anticipates these demand shifts and adjusts the relevant buffers proactively, thereby reducing stockouts and excess inventory. Its implementation in multiple companies has produced encouraging results.

SPEAKER BIO Dr. Sinha is the founder and CEO of Reflexive Supply Chain Solutions, a specialized consulting firm in the area of Operations and Supply Chain.

He has worked with Godrej Consumer Products as the Global Head of Manufacturing, Supply Chain and IT.

He led the TOC implementation in GCPL in 2004, which was the first Viable Vision implementation in the world. Under his leadership, GCPL was awarded the Platinum Award by TOCICO in 2015.

Dr. Sinha has led several TOC implementations across India, USA, Indonesia, Africa and Latin America.

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The Learning Team as Constraint: Integrating Teamology in the Theory of Constraints

Presented by John van der Steur & Willem de Wit

SUMMARY The problem or challenge: CCPM effectively manages flow, but it assumes the project team is already aligned, capable, and collaborative. In reality, the human side of projects—the team itself—is often the hidden constraint. Misaligned team composition, poor communication, and lack of learning during execution stall performance, regardless of how well the schedule is managed. The solution or TOC concept: By integrating Doug

Wilde's Teamology, a method to build cognitively diverse teams based on Jungian typology, and embedding structured peer learning into project flow, we can evolve CCPM to address the human constraint. This approach aligns with TOC's core principle: focus on the real constraint to improve throughput. The implementation or case example: I will share a proposed pilot where one CCPM team operates as usual, and another applies the A-Team framework: Teamology-informed design, a co-created team charter, peer learning rituals (like feedback circles and "hotseats"), and psychological safety checks. The aim is not just faster delivery but smarter, self-improving teams. The actionable takeaway: Attendees will leave with a simple, replicable framework for building A-Teams: - How to use typology to design better teams - How to embed learning rituals into project cycles - How to measure team functioning alongside buffer burn - And how evolving CCPM in this way can dramatically boost project velocity and long-term team effectiveness.

SPEAKER BIO John van der Steur is Senior Expert People Flow at Mobilé 4 Flow & Innovation, a leadership consultant, team strategist, and author of The Power of Polarities: An Innovative Method to Transform Individuals, Teams, and Organizations. Based on Carl Jung's Theory of the Personality. With a background in Jungian psychology and decades of experience helping organizations build high-performance teams, John brings a unique lens to the intersection of human dynamics and operational excellence. His work bridges theory and practice, showing how psychological diversity, structured peer learning, and systems thinking can unlock extraordinary collaboration.

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ToC for Value (V2C): Experiences & Entrepreneurs

Presented by Richard Zultner

SUMMARY There is a Third Way (out of five) to increase the Throughput of a System -- without acting on the "flow rate" constraint (to increase the Volume of the Flow), or on the "flow time" constraint (to increase the Velocity of the Flow). Instead, increase the Value of the Flow, by acting to improve the Value-to-Customer (V2C) of the Output — as demonstrated in The Melissa Case Study solo-preneur example.

SPEAKER BIO Richard E. Zultner, Jonah - Mechanic*, is a Level 3 TOCICO Certified Implementer (TOCIC™) in Critical Chain Project Management, and a certified PMI Project Management Professional (PMP). He works with frustrated project managers facing impossible challenges, teaches them how to consistently finish their projects early (in 15-25% less time), by shifting their project management paradigm to Critical Chain Project Management (CC PM). Additionally, Richard is a Certified Quality Engineer (CQE), and Certified Software Quality Engineer (CSQE), from the American Society for Quality (ASQ). He is a Six Sigma Master Black Belt (MBB), and a QFD Red Belt. Richard is an International Akao Prize® recipient for his lifetime contributions to "Value World" communities, awarded by the International Symposium on QFD (ISQFD), and he holds the title of QFD-Architekt from the QFD Institute — Deutschland.

Formerly Richard was an Adjunct Professor of Critical Chain Project Management at the Howe Graduate School of Technology Management, Stevens Institute of Technology in Hoboken, NJ, USA.