The Baldrige Foundation
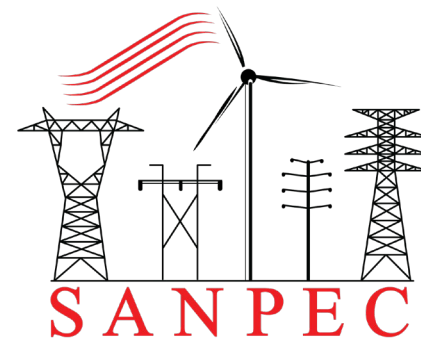
Institute for Performance Excellence

Presents:

Optimizing Your Journey to Excellence

Integrating Business Architecture, AI, and Process Management

July 30, 2024

BALDRIGE FOUNDATION
Institute for Performance Excellence

Mac Baldrige Society Members

The Baldrige Family
Midge, Molly, & Megan

Opening Remarks/Agenda

Introduction **Al Faber**, President & CEO
Baldrige Foundation

Panelist **Lourdes Gonzalez**, Principal Advisor
Lulu Process Design Group

**Audience
Questions** **Moderator – Al Faber**
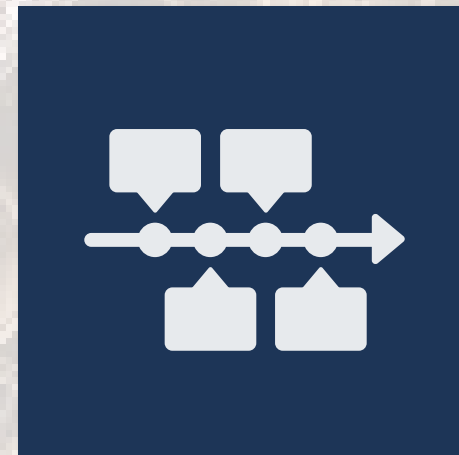
Closing **Al Faber Remarks**

OUR JOURNEY TODAY

Optimizing Your Journey to Excellence: Integrating Business Architecture, AI, and Process Management
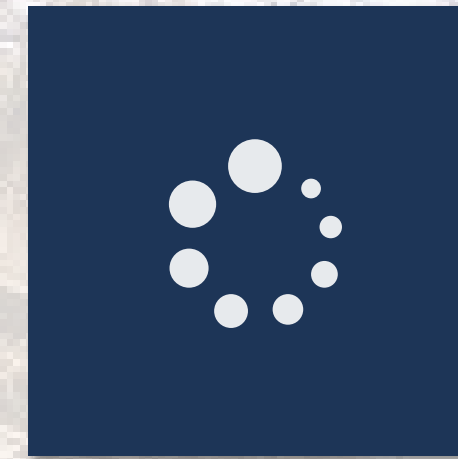
Baldrige Excellence Framework & Business Architecture

- Baldrige: a Compass for Success
- Fundamental Concepts of Business Architecture
- Alignment: Business architecture + Baldrige framework

AI + Process Architecture

- How to develop a process architecture
- Leveraging AI technologies to increase efficiency on process design
- AI + BPM Tips

Building a Culture for Active Process Management

- What is active process management?
- Key tools & techniques that help achieving process excellence

Augmenting Your Workforce Capability

- Tools and Tips for Effectively Preparing your People for Process Changes and for an AI-enabled future
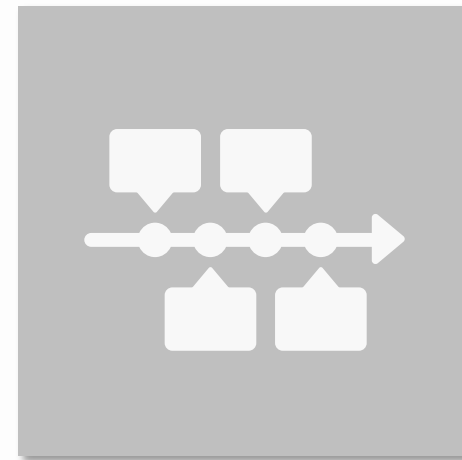
LULU PROCESS DESIGN GROUP

OUR JOURNEY TODAY

Optimizing Your Journey to Excellence: Integrating Business Architecture, AI, and Process Management
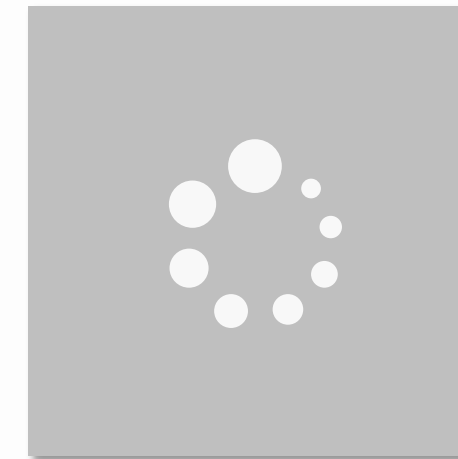
Baldrige Excellence Framework & Business Architecture

- Baldrige: a Compass for Success
- Fundamental Concepts of Business Architecture
- Alignment: Business architecture + Baldrige framework

AI + Process Architecture

- How to develop a process architecture
- Leveraging AI technologies to increase efficiency on process design
- AI + BPM Tips

Building a Culture for Active Process Management

- What is active process management?
- Key tools & techniques that help achieving process excellence

Augmenting Your Workforce Capability

- Tools and Tips for Effectively Preparing your People for Process Changes and for an AI-enabled future
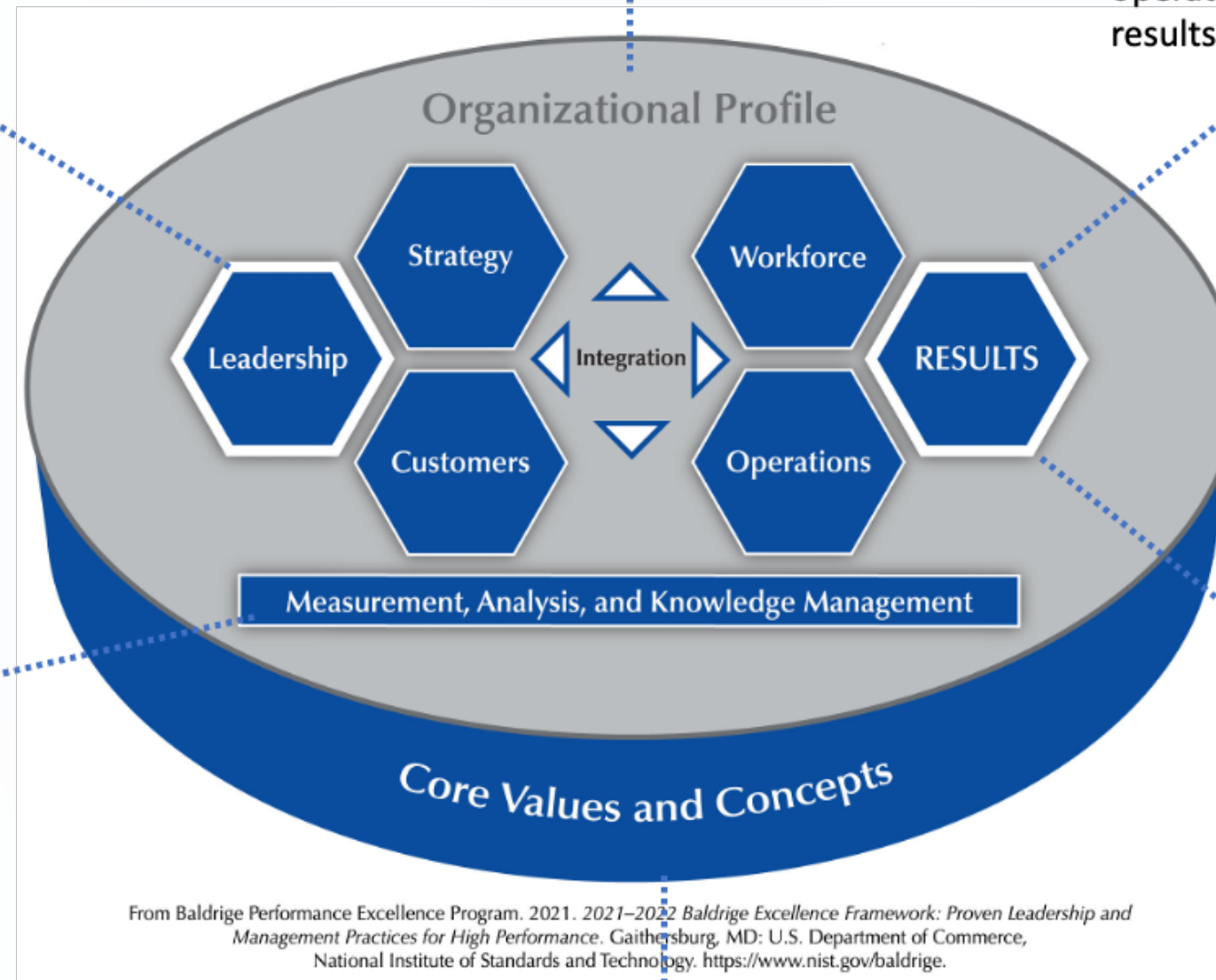
Baldrige Excellence Framework | A System Perspective

The **Organizational Profile** sets the context of the organization. It serves as a background of what they do.

The **leadership** triad emphasizes the importance of a leadership focus on strategy and customers.

The **results** triad includes the organization's workforce-focused processes, its key operational processes, and the performance results they yield.

The **system foundation** is critical to effective management and to a fact-based, knowledge-driven, agile system for improving performance and competitiveness.

All actions lead to **Results -** a composite of product and processes; customer; workforce; leadership and governance; and financial, market, and strategy results.

Organizational Profile

Strategy — Workforce
Leadership — Integration — RESULTS
Customers — Operations

Measurement, Analysis, and Knowledge Management

Core Values and Concepts

From Baldrige Performance Excellence Program. 2021. *2021–2022 Baldrige Excellence Framework: Proven Leadership and Management Practices for High Performance.* Gaithersburg, MD: U.S. Department of Commerce, National Institute of Standards and Technology. https://www.nist.gov/baldrige.

The basis of the Criteria is a set of **Core Values and Concepts** that are embedded in high-performing organizations.

LULU PROCESS
DESIGN GROUP
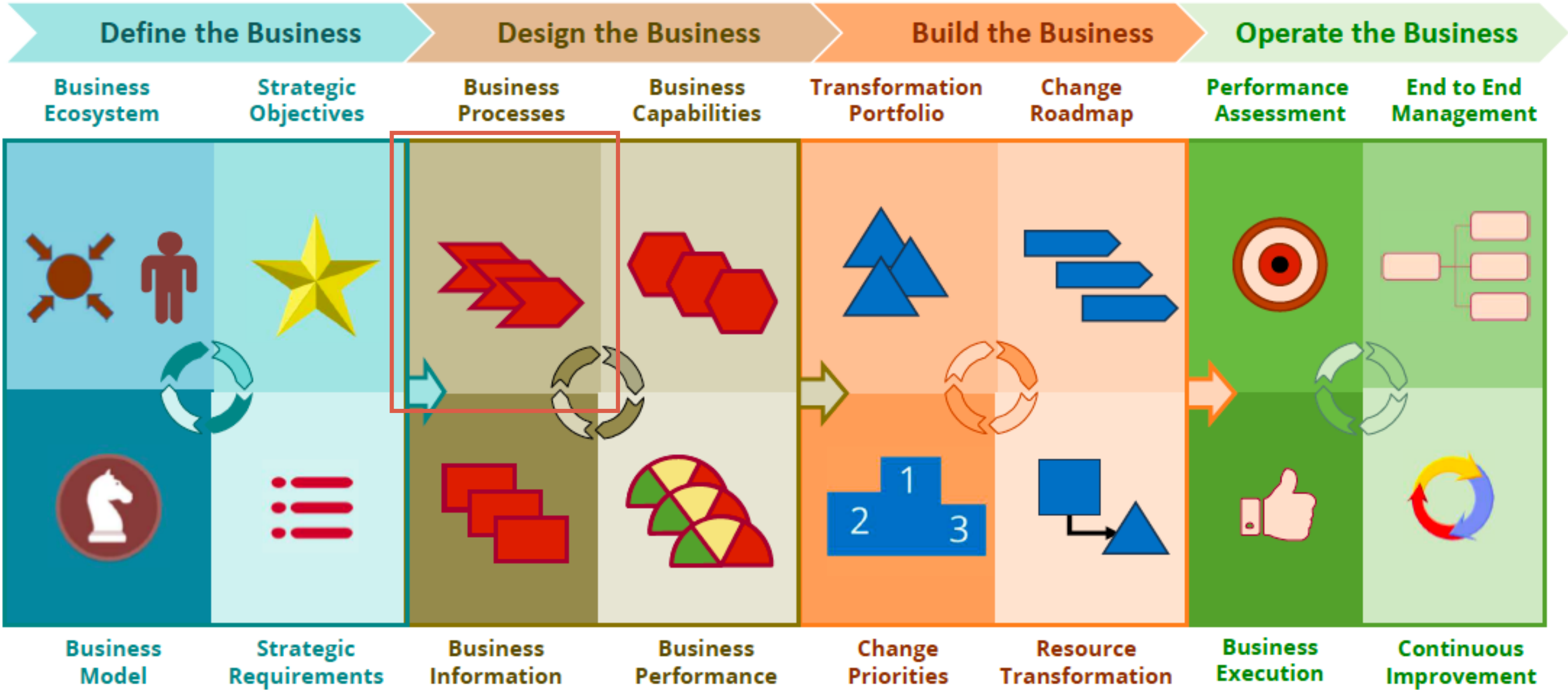
Integrating Baldridge AND Business Architecture

The **LEADERSHIP** triad emphasis the importance of a leadership focus on strategy and customers.

Business Architecture is the structured description of the concepts and facts relevant to designing, planning, analyzing, operating, changing, managing a business.

The **RESULTS** triad includes the organization's workforce-focused processes, its key operational processes, and the performance results they yield.

Define the Business		Design the Business		Build the Business		Operate the Business	
Business Ecosystem	Strategic Objectives	Business Processes	Business Capabilities	Transformation Portfolio	Change Roadmap	Performance Assessment	End to End Management
Business Model	Strategic Requirements	Business Information	Business Performance	Change Priorities	Resource Transformation	Business Execution	Continuous Improvement

Integrating Baldridge AND Business Architecture
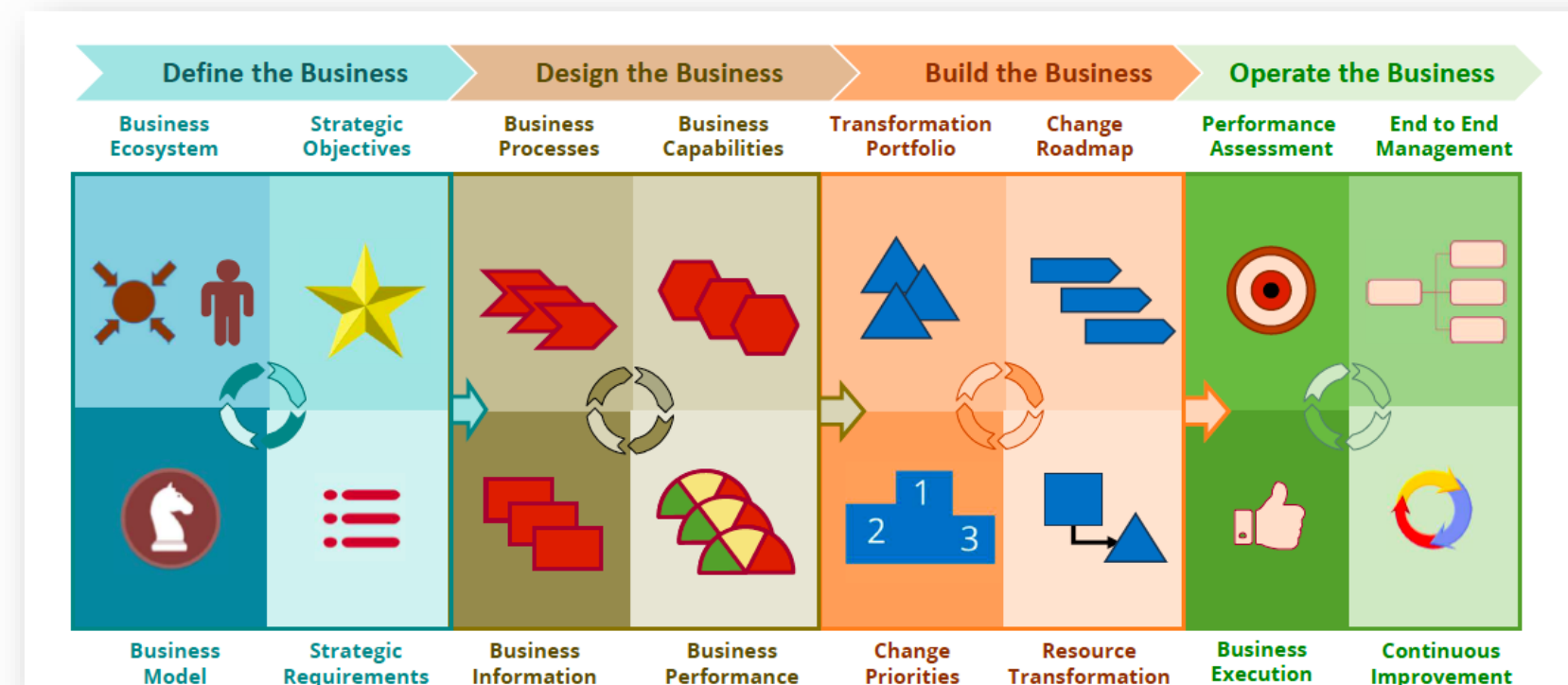
Non-Prescriptive "How and What"
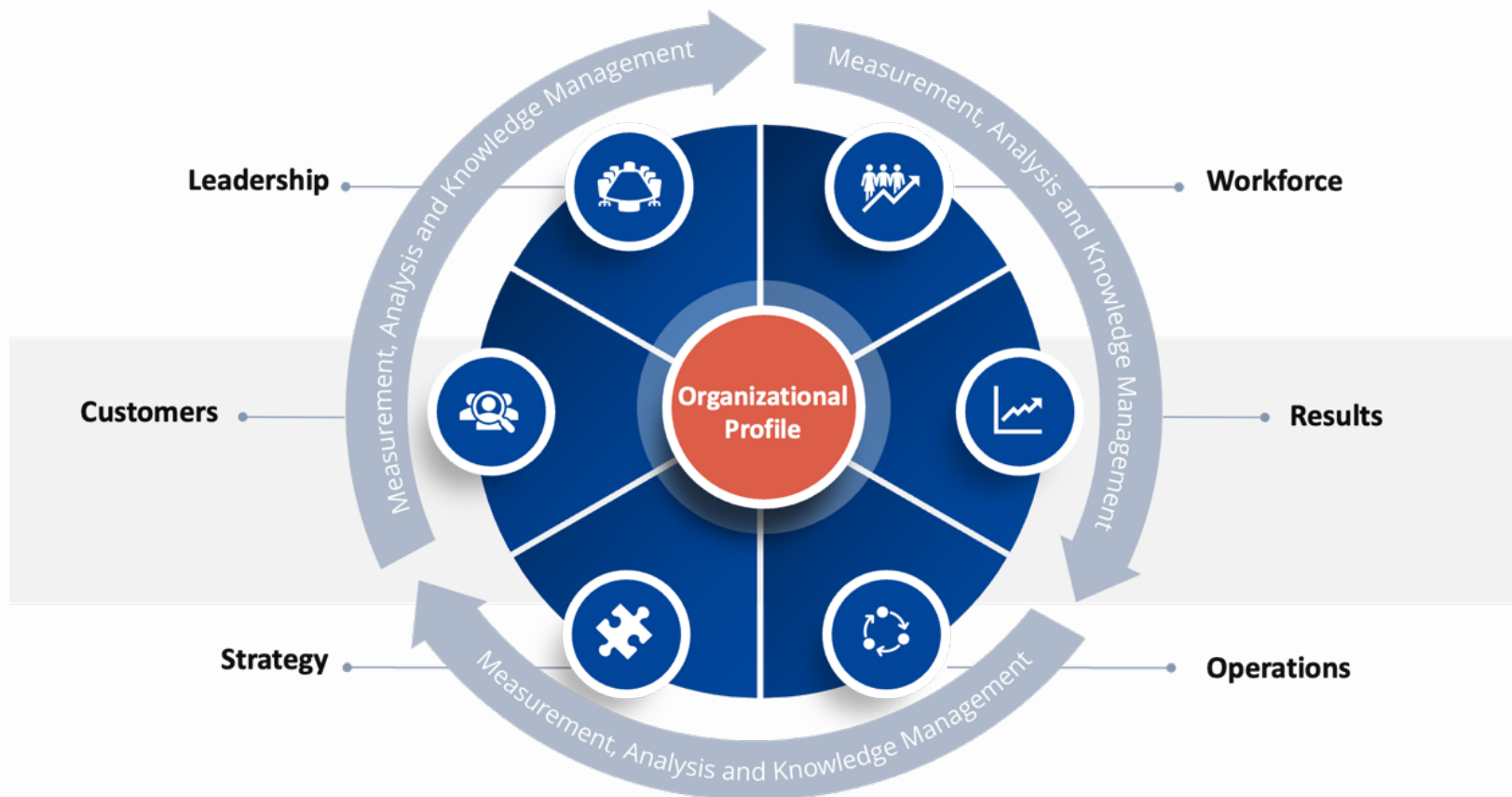
Prescriptive "HOW"

CAT 1: Leadership

CAT 2: Strategy

CAT 3: Customers

CAT 4: Measurement, Analysis & KM

CAT 5: Workforce

CAT 6: Operations

Key Concepts to Design a Process Architecture

KNOWLEDGE REQUIRED

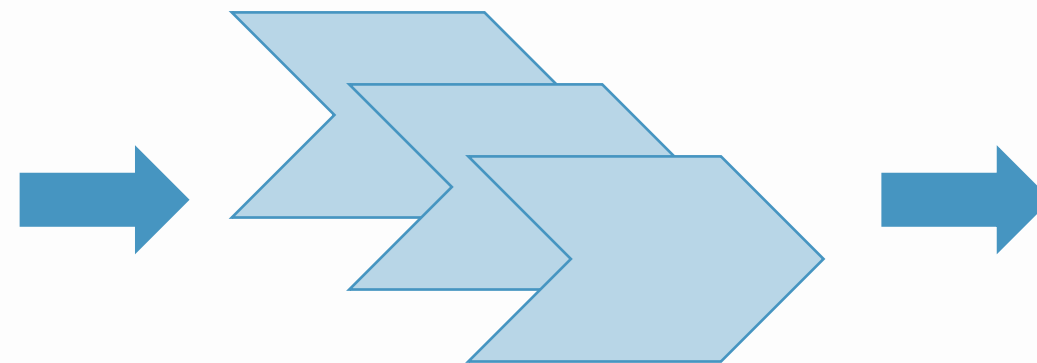**KNOWLEDGE DOMAIN IN FOCUS**

DOMAINS IMPACTED

Business Model – provides guidance for process design
Business Ecosystem – defines business interactions with external parties
Strategic Objectives – provides guidance for process design

Business Capabilities – defines the processes that execute those capabilities
Business Information – identifies information created and used by business processes

Continuous Improvement – updates process design

BUSINESS PROCESSES

Business Capabilities – defines requirements for capabilities
Business Performance – provide business process goals to be measured

Transformation Portfolio – defines capabilities to be developed
Change Priorities – identifies processes to be prioritized

End to End Management – provides structure for accountabilities and governance
Business Execution – identifies processes to be executed
Continuous Improvement – provides process design

LULU **PROCESS** DESIGN GROUP

PROCESS RENEWAL GROUP

OUR JOURNEY TODAY

Optimizing Your Journey to Excellence: Integrating Business Architecture, AI, and Process Management

Baldrige Excellence Framework & Business Architecture

- Baldrige: a Compass for Success
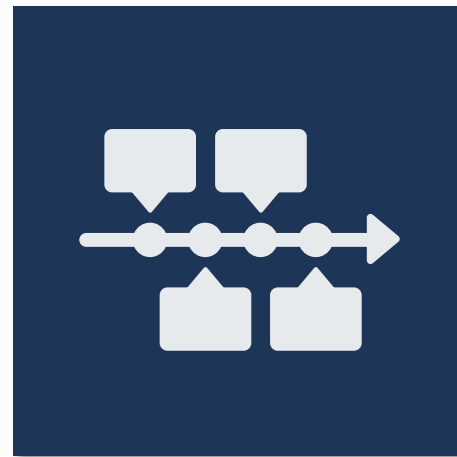- Fundamental Concepts of Business Architecture
- Alignment: Business architecture + Baldrige framework

AI + Process Architecture

- How to develop a process architecture
- Leveraging AI technologies to increase efficiency on process design
- AI + BPM Tips

Building a Culture for Active Process Management

- What is active process management?
- Key tools & techniques that help achieving process excellence

Augmenting Your Workforce Capability

- Tools and Tips for Effectively Preparing your People for Process Changes and for an AI-enabled future

LULU PROCESS
DESIGN GROUP

Developing the Business Process Architecture

STAKEHOLDER

Take every stakeholder relationship concept

CONNECT PROCESSES

Take every other meaningful business concept/object from the concept model

CUSTOMER VALUE

Derive top level value creating services for your architecture

DESIGN BEST PRACTICES

Follow the naming conventions:

- Nouns for business concepts

- Verbs for process and value streams

Develop Process Architecture and prioritize the business for improvement

WHO WE ARE

What are the key characteristics that describe your business? Learn how to define your business profile.

WHAT WE HAVE

Understand what are your key core, guiding and support processes, and assess their current state and impact to your business.

PLAN FOR IMPROVEMENT

Discover practical tips to prioritize process improvements to enable business value and exceptional customer service.

OUR PROCESSES

Learn how to harness the power of your business processes to produce business value and exceptional customer service.

BUSINESS PROCESSES (VALUE STREAMS) DESCRIBE THE WORK PERFORMED BY ALL RESOURCES TO DELIVER OUTCOMES OF VALUE FOR CUSTOMERS AND STAKEHOLDERS.

Defining a process

Minimalist

Holistic

PROCESS. Linked activities with the purpose of producing a service for a customer (user) within or outside your organization. Generally, processes involve combinations of people, machines, tools, techniques, materials, and improvements in a defined series of steps or actions. Processes rarely operate in isolation and must be considered in relation to other processes that impact them.

A Process

Output

Outcomes of Stakeholder Value

Includes all resources and assets required for process execution

Delivers value (products & services) to customers and other stakeholders
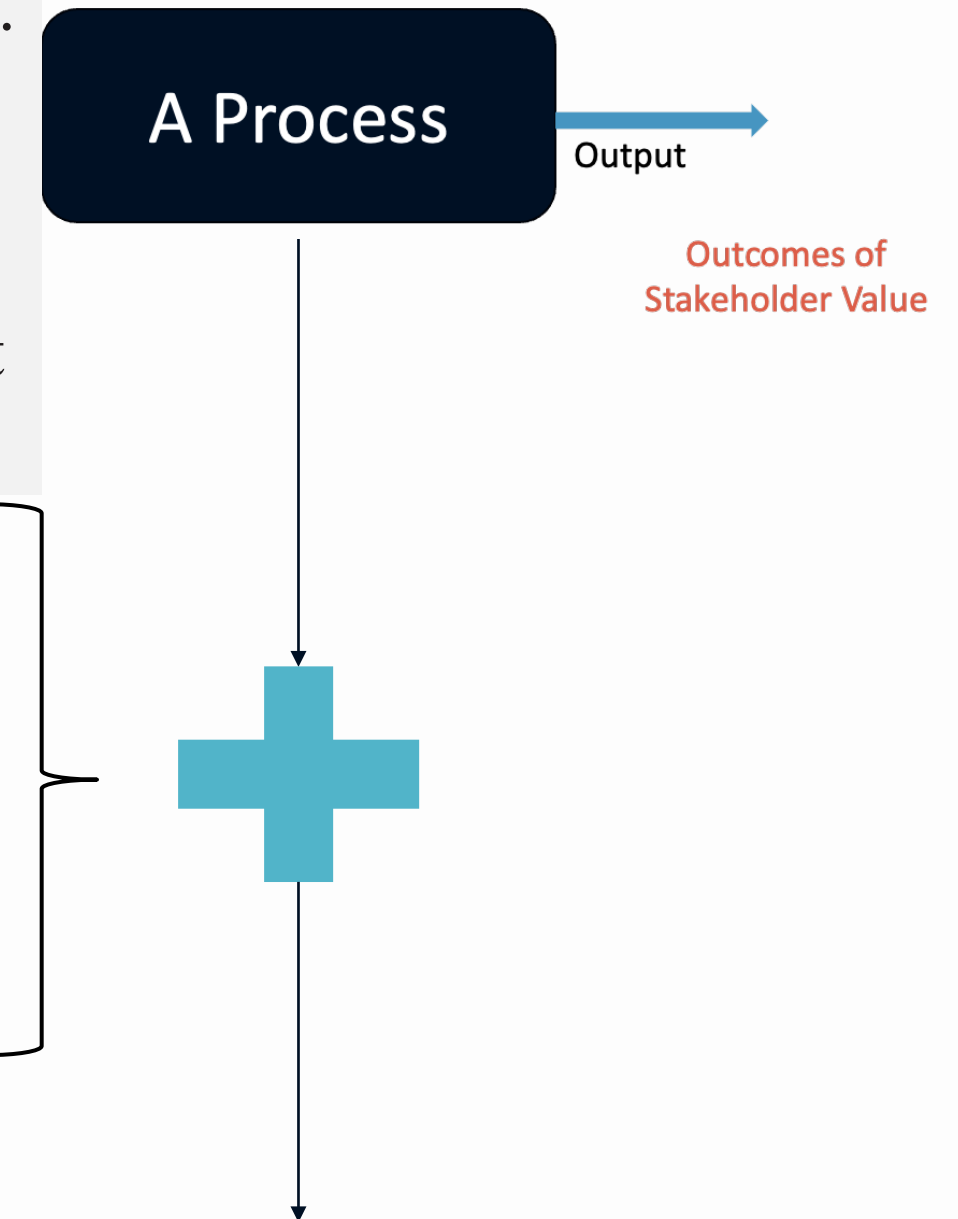
... the only way any organization can deliver value externally

Sample of Processes from the Criteria

CAT 1: Leadership
Communication Process, Suppliers Management Process, Risk Management Process, Human Resources Processes, Workforce Development Process, Governance Process, Legal & Regulatory Compliance Processes, Community Outreach Processes

CAT 2: Strategy
Strategic Process, Innovation Process, Capability Analysis Process, Change Management Process, Project Management Process, Environmental Scanning Process, Benchmarking Process, Goal Setting Process

CAT 3: Customers
Relationship Management Process, Customer Onboarding Process, Complaint Management Process, Communication Process, Marketing Processes, Product Development Process, Customer Support Process
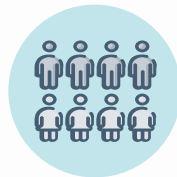
CAT 4: Measurement, Analysis & KM
Data & Information Analysis Process, Performance Management System, Continuous Improvement Process, Process Metric Definition Process, Data Security Processes, Knowledge Management Process

~50

CAT 5: Workforce
Employee Lifecycle Management Processes, Workforce Capability & Capacity Analysis, Organizational Change Management, Organization Design Processes, Security Processes, Health and Wellness Processes, Policy Management, Benefits Management, Performance Management, Workforce Engagement Processes, Workforce Development Process

CAT 6: Operations
Product/Services Design Process, Process Design Process, Process Deployment Process, Process Improvement Process, Innovation Management Process, Supply Chain Management Process, Cost Management, Reliability Management, Security & Cybersecurity Processes, Business Continuity Process

Guiding	Core	Support

LULU PROCESS
DESIGN GROUP

14

WHO WE ARE

Mission

Implement personalized educational programs to facilitate student achievement. These educational programs will demonstrate that standards-based educational reform can provide a prototype for changing the way teachers teach and students learn in the future.

Vision

Development of a personalized instructional program that demonstrates positive outcomes for each student.

Company Name	The Charter School of SD
Established Date	1994
Type of Industry	Education
Annual Revenue	$ 24M
No. Of Employees	135

Company Description

A public school option that offers an academic intervention program to re-engage students.

Key Offerings

Academic intervention program for students 6-12th with proven track of dramatically of increasing graduation rates.

Competitive Environment

Ranked one of the highest performing DASS schools. It has three competing schools with similar instructional design and student demographics.

Customer Profile

Parents and Students: 6th to 12th grade. Requirements: readiness for college, safe & supportive environment, engaging and motivated experience

Key Assets

Modern facility with integrated technologies: 13 Resource Centers, one Cadet Corp Headquarters, two Student Support Regional Centers and one Corporate Office.

Key Partners & Key Regulators

Partners: Consultants, Advocates, Marketing Agency, Special Education Services Regulatory: 8+ State Agencies and 7+ Federal Agencies

Workforce Profile

Instructional Staff, Support Staff and Leadership. Requirements: clear expectations, two-way communication, meaningful assignments.

LULU PROCESS DESIGN GROUP

Develop Process Architecture and prioritize the business for improvement

WHO WE ARE

What are the key characteristics that describe your business? Learn how to define your business profile.

WHAT WE HAVE

Understand what are your key core, guiding and support processes, and assess their current state and impact to your business.

PLAN FOR IMPROVEMENT

Discover practical tips to prioritize process improvements to enable business value and exceptional customer service.

OUR PROCESSES

Learn how to harness the power of your business processes to produce business value and exceptional customer service.

BUSINESS PROCESSES (VALUE STREAMS) DESCRIBE THE WORK PERFORMED BY ALL RESOURCES TO DELIVER OUTCOMES OF VALUE FOR CUSTOMERS AND STAKEHOLDERS.

WHAT WE HAVE: Begin by understanding the Business Ecosystem

Community

- Community Needs
- Donations
- Volunteers

- Brand Equity
- Payments

- Home requirements
- Time
- Payments

Broker Agent

- Permits
- Request for Information

Industry Regulators

- Home Specs
- Permit Request

Our Business

What are some of the things you must know about inside of the box?

- New home
- Invoices
- Home Specs
- Warranty
- Customization
- Luxury Experience

Customers

- Purchase Orders
- Purchase Schedules
- Payments

Partners

- Products
- Skilled Manpower
- Invoices
- Services
- Resource Capacity

- Business Strategy
- Business Systems
- Investment
- Leadership

- Employment
- Salary
- Development
- Benefits
- Facilities

Staff

- Financial Info
- Reports

Lenders

- $$$

- Purpose
- Direction/Guidance
- Money

Owners

- Job application
- Time
- Knowledge
- Teamwork
- Capacity

LULU PROCESS
DESIGN GROUP

WHAT WE HAVE: guiding, core, and support processes

Business Process Architecture: 0th version using AI Apps + BPM Expertise

Guiding Processes

Develop Mission, Vision & Values	Monitor & Analyze Finances	Assess & Mitigate Risks	Assure Legal Compliance (Licenses & Regulations)	Develop Class Curriculum
Set and Manage Strategies	Market, Promote Brand & Services	Define Curriculum Strategy & Pricing	Manage Customer Relationships	Establish Safety Protocols

Core Processes

Register Students & Schedule Classes

Enroll Student	Assess Skill Level of Student	Complete Onboarding of Family	Register Student to Class	Schedule Classes & Instructors

Instruct Swimming Students

Review Safety Protocols	Teach Aquatic Skills	Engage Students in Learning Activities

Assess & Monitor Student Progress

Evaluate Students' Progress	Adjust Teaching Methods	Award Certificates for Next Skill Level

Enabling Processes

Ensure Safety Compliance & Quality Assurance	Manage Staff Lifecycle	Administer IT Systems & Infrastructure	Foster Community Engagement & Outreach	Manage Change
Monitor & Improve Quality of Instruction	**Maintain Equipment & Facilities**	Manage Procurement (SC)	Manage & Improve Processes	Plan, Design & Manage New Facilities

WARNING: This does NOT substitute the **engagement value** of creating a Business Architecture with the Organization!

Generative AI + Process Architecture Design

AI Products (Apps) and Tips

WHAT DO I NEED?	AI Products to Use	Tips on Using AI Products	BPM Use Cases
Understand the business	ChatGPT, MS Copilot	• Provide context about your role as BPM practitioner • Provide context of the business • Create concise prompts • **Validate** business profile with the executive team	• Gain knowledge about new industry sectors and/or specific businesses • Develop elements of the business profile
Explore version 0 for a process architecture	ChatGPT Plus (BPM Apps), MS Copilot	• Provide context about your role and the project. • Provide context of the business. • Create concise prompts. • Explore & compare outcome from multiple Apps. • **Validate** output with an industry expert.	• Explore level 0 processes. • Generate ideas for sub-processes (triggers, activities, roles, etc.). • Use information to model processes using an BPMN modeling application.
Develop process descriptions & documentation	ChatGPT Plus (BPM Apps)	• Ask follow up questions. • **Validate** dataset information with your own expertise.	• Process documentation • Content for modeling processes

HOW GOOD IS IT? HOW IMPORTANT IS IT?

Instructions:

1 | FOR EVERY BOX, ASK YOURSELF A QUESTION:

- ✓ Do we have it? Is it in place?
- ✓ Is it good?

Depending on the answer, change the color of the box to <mark style="background:red">Red</mark>, <mark style="background:yellow">Yellow</mark>, <mark style="background:green">Green</mark> (see next slides)

2 | ADD/REMOVE/RENAME BOXES AS NEEDED.

3 | ASSESS 'IMPORTANCE' OF EACH BOX, ADD THE STAR GOLD, SILVER, BLUE (SEE NEXT SLIDES).

⭐ **Gold:** Very important to the success of the business.
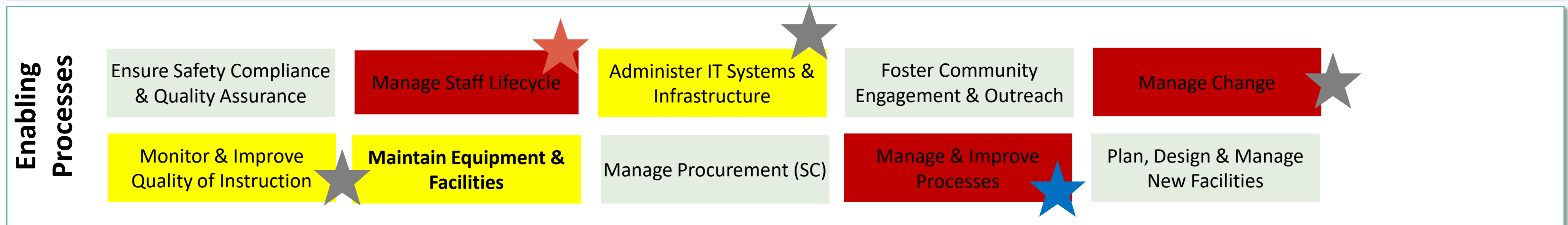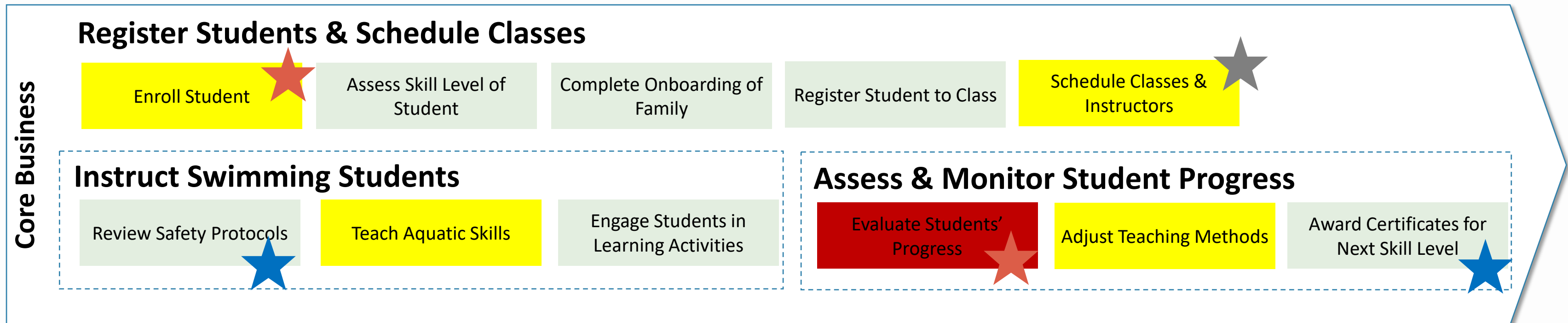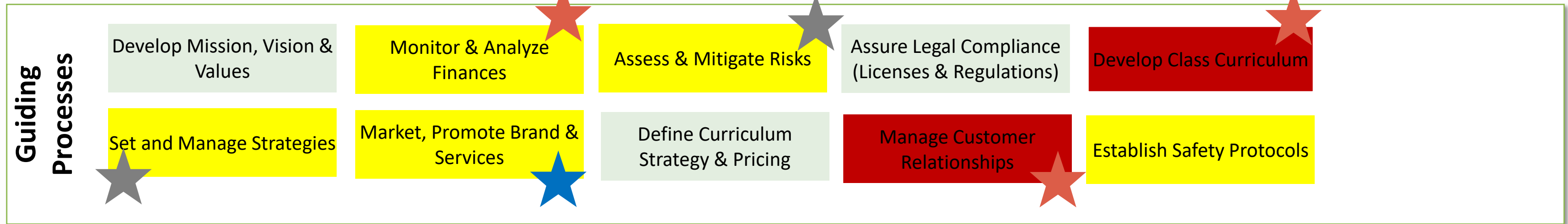
⭐ **Silver:** Important to the success of the business.

⭐ **Bronze:** Just needs to be in place.

LULU PROCESS
DESIGN GROUP

Stay Focus: Process Improvement Roadmap

Business Process Architecture: 1st version

Guiding Processes

Develop Mission, Vision & Values	Monitor & Analyze Finances	Assess & Mitigate Risks	Assure Legal Compliance (Licenses & Regulations)	Develop Class Curriculum
Set and Manage Strategies	Market, Promote Brand & Services	Define Curriculum Strategy & Pricing	Manage Customer Relationships	Establish Safety Protocols

Core Business

Register Students & Schedule Classes

Enroll Student	Assess Skill Level of Student	Complete Onboarding of Family	Register Student to Class	Schedule Classes & Instructors

Instruct Swimming Students

Review Safety Protocols	Teach Aquatic Skills	Engage Students in Learning Activities

Assess & Monitor Student Progress

Evaluate Students' Progress	Adjust Teaching Methods	Award Certificates for Next Skill Level

Enabling Processes

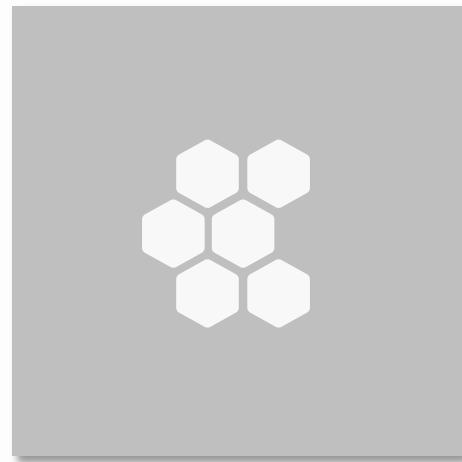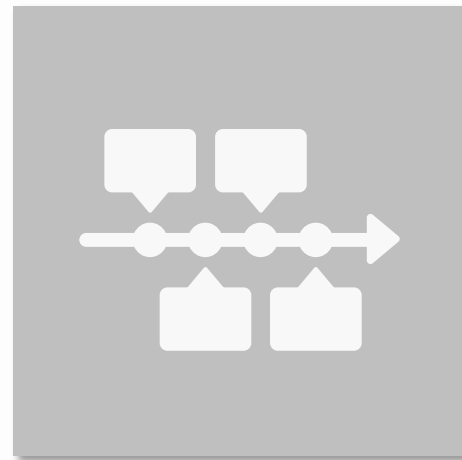|				
Ensure Safety Compliance & Quality Assurance	Manage Staff Lifecycle	Administer IT Systems & Infrastructure	Foster Community Engagement & Outreach	Manage Change
Monitor & Improve Quality of Instruction	**Maintain Equipment & Facilities**	Manage Procurement (SC)	Manage & Improve Processes	Plan, Design & Manage New Facilities

LULU PROCESS
DESIGN GROUP

OUR JOURNEY TODAY

Optimizing Your Journey to Excellence: Integrating Business Architecture, AI, and Process Management
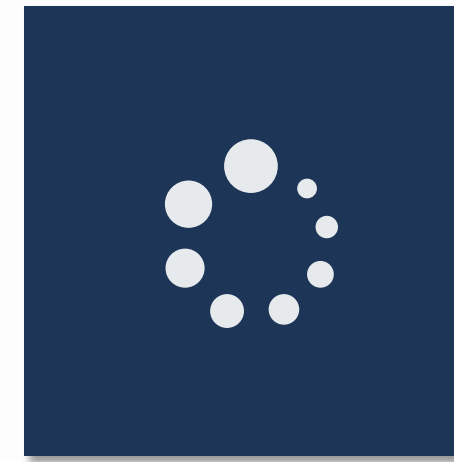
Baldrige Excellence Framework & Business Architecture

- Baldrige: a Compass for Success
- Fundamental Concepts of Business Architecture
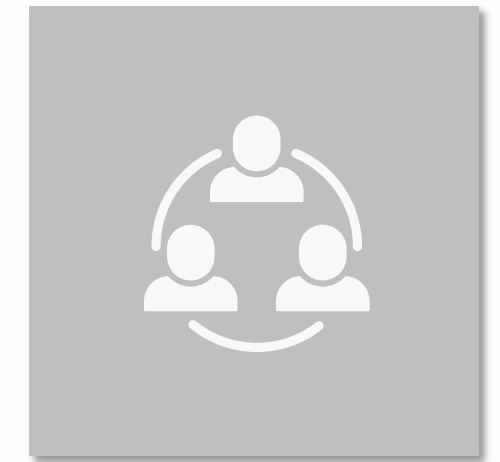- Alignment: Business architecture + Baldrige framework

AI + Process Architecture

- How to develop a process architecture
- Leveraging AI technologies to increase efficiency on process design
- AI + BPM Tips

Building a Culture for Active Process Management

- What is active process management?
- Key tools & techniques that help achieving process excellence

Augmenting Your Workforce Capability

- Tools and Tips for Effectively Preparing your People for Process Changes and for an AI-enabled future

LULU PROCESS
DESIGN GROUP

Business Performance Excellence | Highest Maturity Level

Process *Performance* Excellence - the purpose of process is *performance*

Baldrige D ...ation

- An *e* ...questions in th...
- The ...aps in any area...
- *Fact* ...of best prac... ...re key orga... **(L)**
- The approach is *well integrated* with your *current and future organizational needs* as identified in response to the Organizational Profile and other process items. **(I)**

RUBRIC

|	Levels and Trends	Comparisons	Relevance
Low	Results are not responsive to the question or demonstrate adverse performance.	Comparisons to competitors or industry benchmarks are not presented or demonstrate inferior performance.	Results are not presented for areas of importance.
Med	Results responsive to the question are presented and demonstrate satisfactory performance.	Comparisons to competitors or industry benchmarks are presented and demonstrate equivalent performance.	Some results presented are for areas of importance.
High	Results responsive to the question are presented and demonstrate favorable performance.	Comparisons to competitors and industry benchmarks are presented and demonstrate superior performance.	Most results presented are for areas of importance.

LULU PROCESS
DESIGN GROUP

Performance | the purpose of a process is performance
- that it's the lifeblood of process <u>management</u>
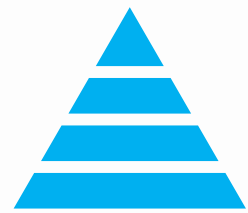
FOUNDATION

- Why bother?
- Outcomes focus
- Process of Process
- Enabling
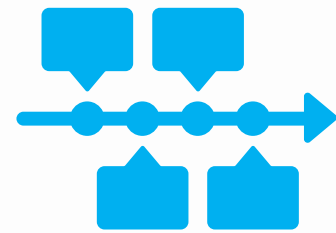
TARGET

- Which process?
- How many?
- Targeting
- Collecting
- Predicting

ASSESS

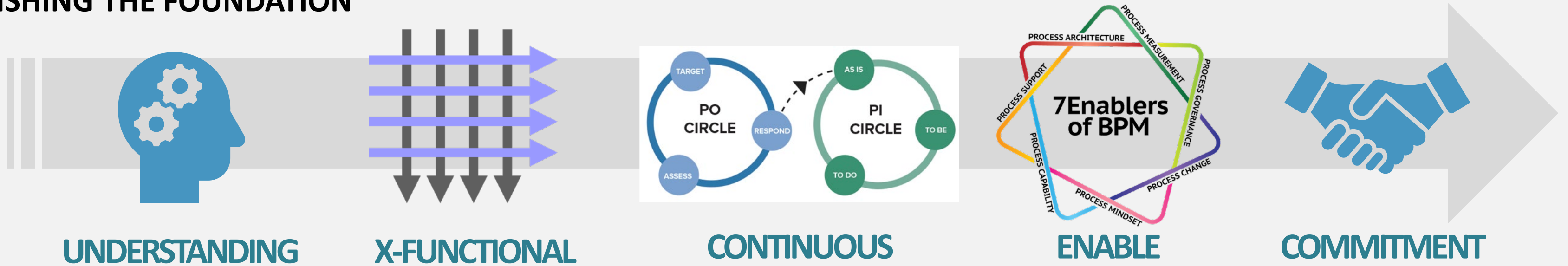- Governance
- Whose job?
- POBoK
- Active process management

RESPOND

- Analysis
- Planning
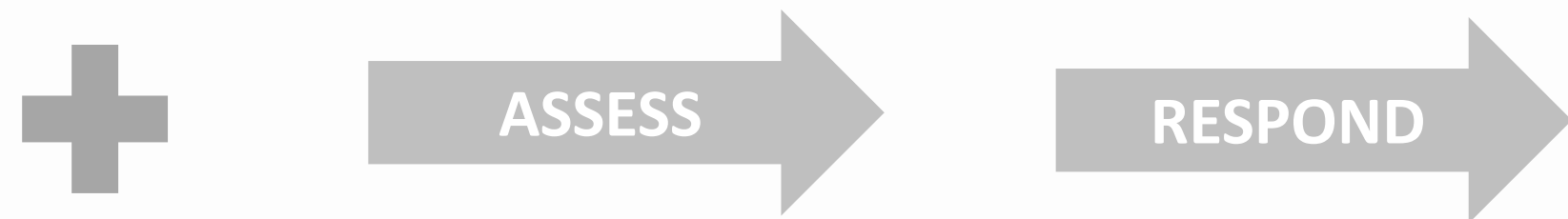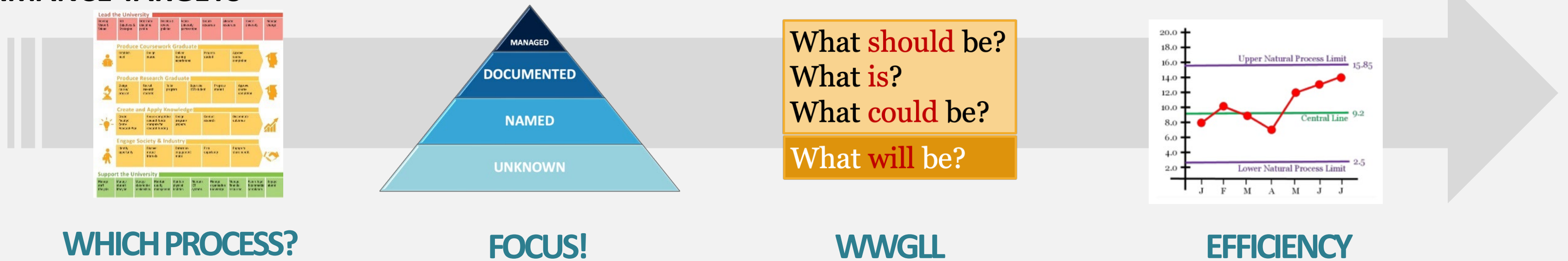- Change

What is process-based management?

Continuous management of the hierarchy of processes by which value is created, accumulated, and delivered, with the active intention of optimizing process performance through mindful, continuous improvement.

Process-based Management | a Systematic and Effective Approach
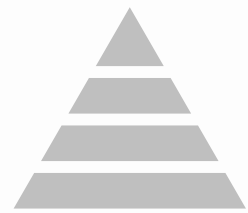
ESTABLISHING THE FOUNDATION

UNDERSTANDING **X-FUNCTIONAL** **CONTINUOUS** **ENABLE** **COMMITMENT**

PERFORMANCE TARGETS

What **should** be?
What **is**?
What **could** be?
What **will** be?

WHICH PROCESS? **FOCUS!** **WWGLL** **EFFICIENCY**
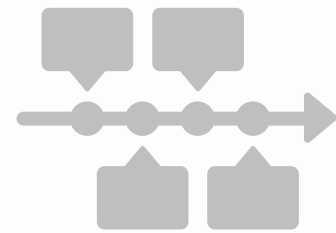
+   **ASSESS** →   **RESPOND** →

Performance | the purpose of a process is performance
- that it's the lifeblood of process management

FOUNDATION

- Why bother?
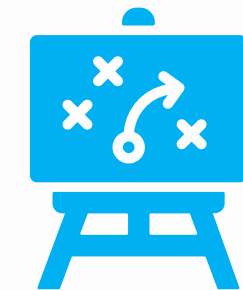- Outcomes focus
- Process of Process
- Enabling

TARGET

- Which process?
- How many?
- Targeting
- Collecting
- Predicting

ASSESS

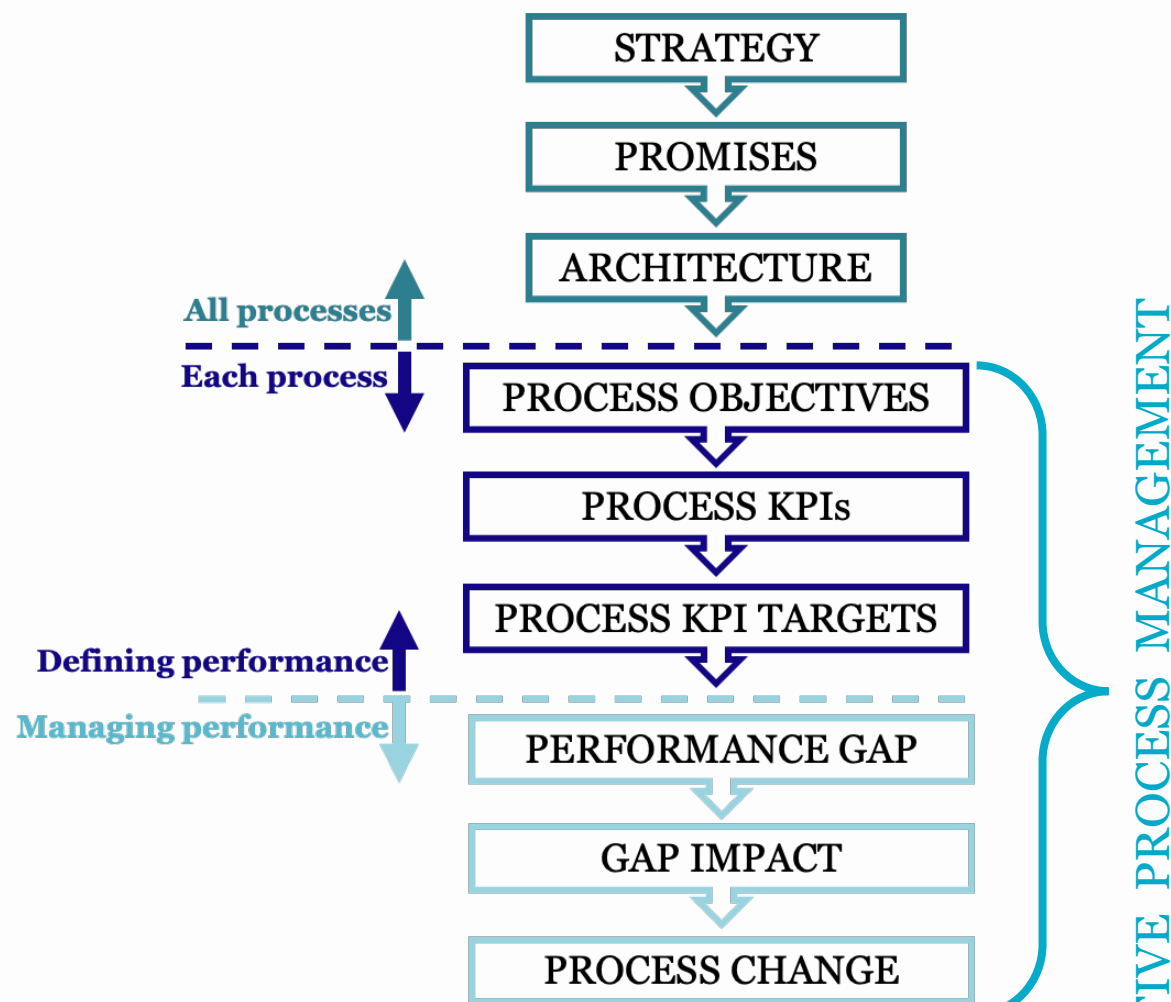- Governance
- Whose job?
- POBoK
- Active process management

RESPOND

- Analysis
- Planning
- Change

Assessing Performance

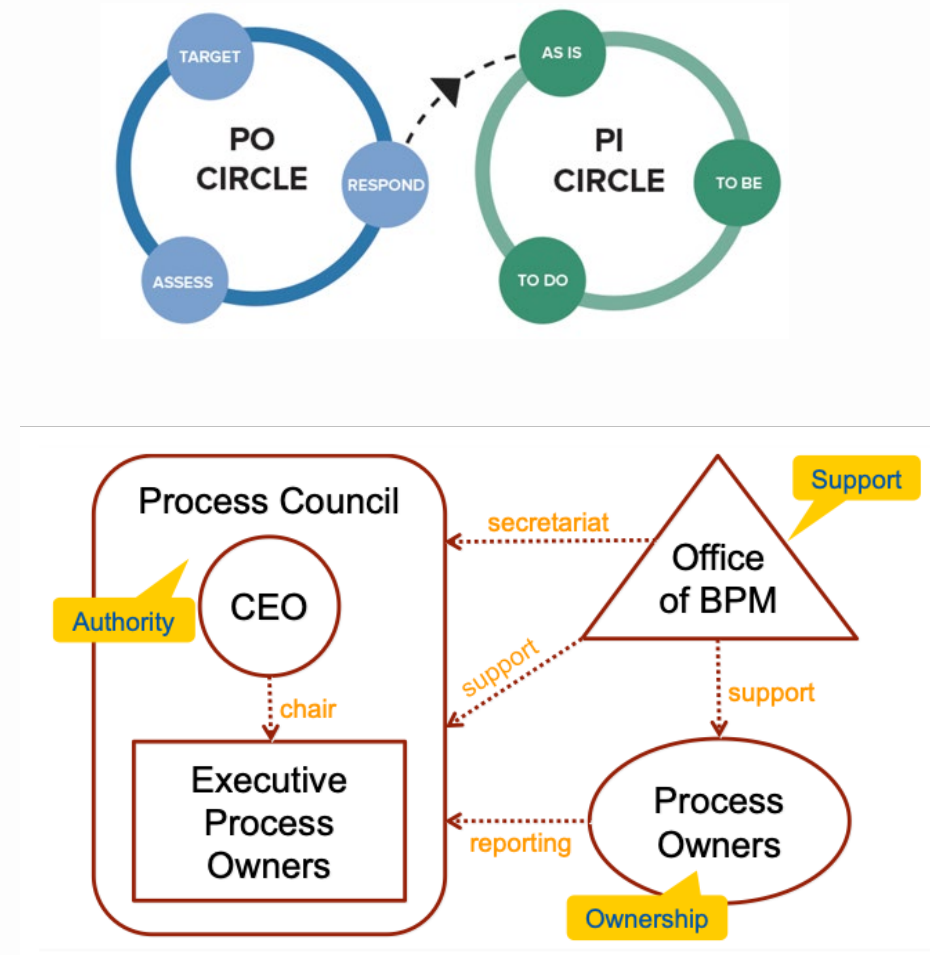The **M** in BP**M** is for **Management**, not modelling or measurement!
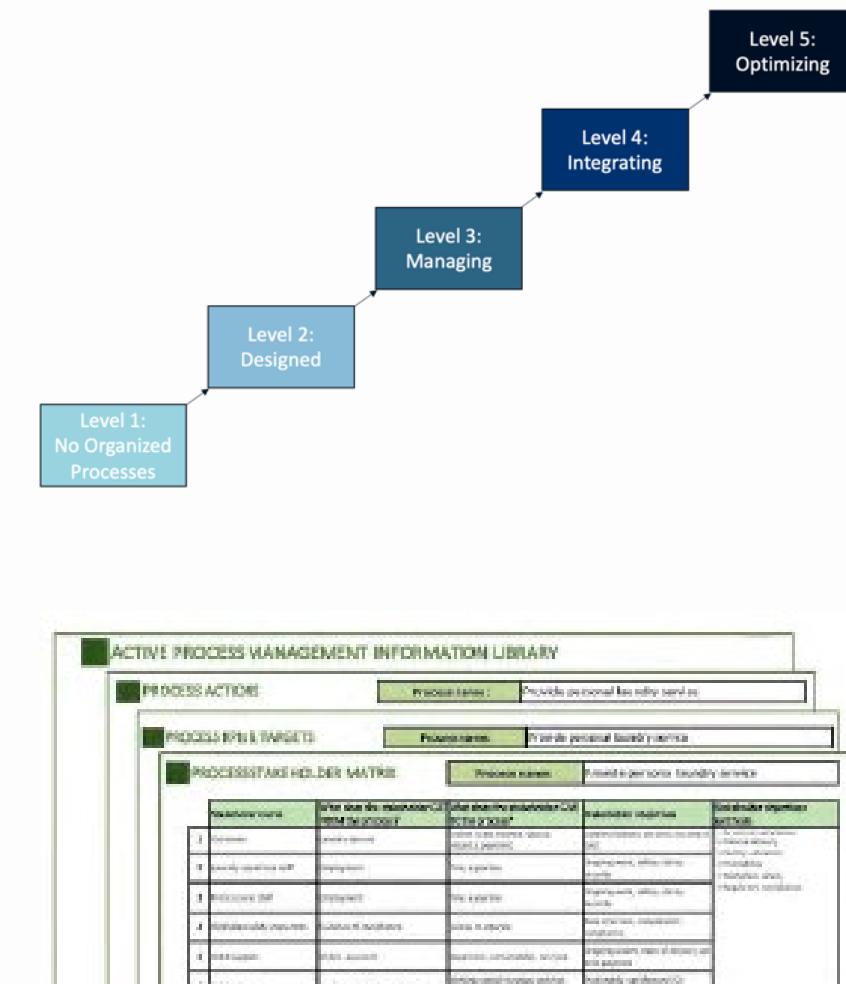
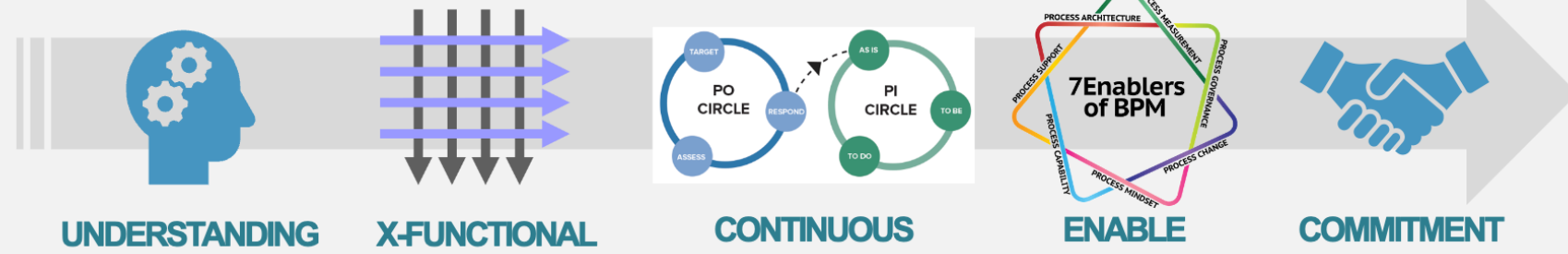| Performance Management	Who manages?	Performance BoK
Active Process Management	**Process Governance Model**	**Process Management Record & Process Maturity**

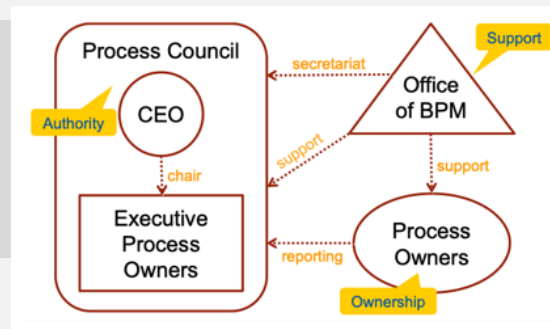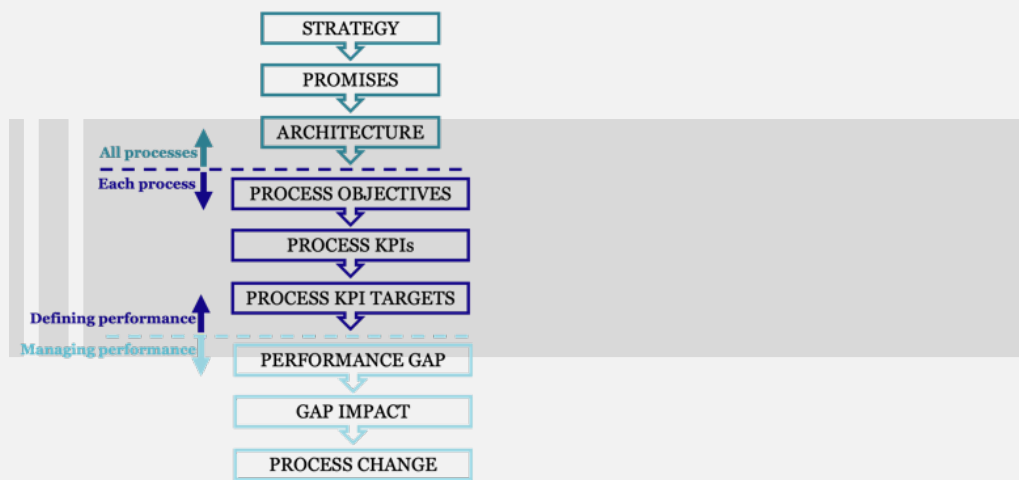# Process-based Management | a Systematic and Effective Approach

ESTABLISHING THE FOUNDATION

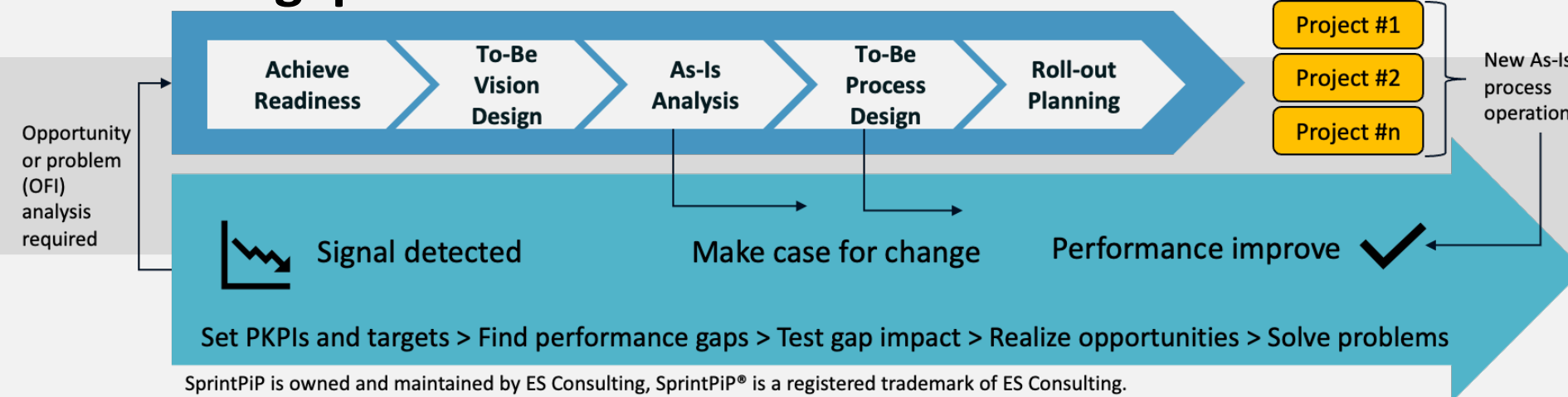UNDERSTANDING   X-FUNCTIONAL   CONTINUOUS   ENABLE   COMMITMENT

7Enablers of BPM

PERFORMANCE TARGETS

WHICH PROCESS?   FOCUS!   WWGLL   EFFICIENCY

MANAGED / DOCUMENTED / NAMED / UNKNOWN

What should be?
What is?
What could be?
What will be?

ASSESS

STRATEGY
PROMISES
ARCHITECTURE
All processes
Each process
PROCESS OBJECTIVES
PROCESS KPIs
Defining performance
Managing performance
PROCESS KPI TARGETS
PERFORMANCE GAP
GAP IMPACT
PROCESS CHANGE

ACTIVE MANAGEMENT

Process Council
CEO — Authority — chair
Office of BPM — Support — secretariat
Executive Process Owners — reporting — Process Owners — Ownership — support

GOVERNANCE

ACTIVE PROCESS MANAGEMENT INFORMATION LIBRARY

ACTIVE MANAGEMENT

BODY OF KNOWLEDGE & MATURITY

RESPOND = closing performance gaps

Achieve Readiness → To-Be Vision Design → As-Is Analysis → To-Be Process Design → Roll-out Planning

Project #1
Project #2
Project #n

New As-Is process operational

Opportunity or problem (OFI) analysis required

Signal detected   Make case for change   Performance improve ✔

Set PKPIs and targets > Find performance gaps > Test gap impact > Realize opportunities > Solve problems
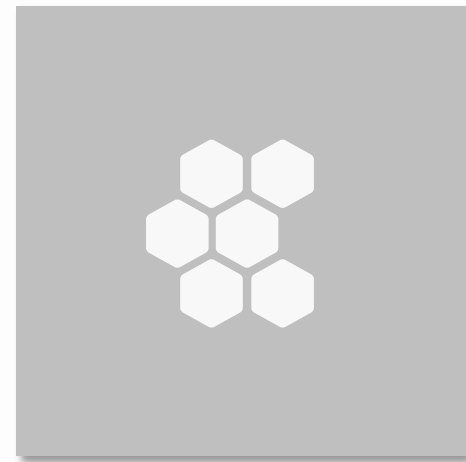
SprintPiP is owned and maintained by ES Consulting, SprintPiP® is a registered trademark of ES Consulting.

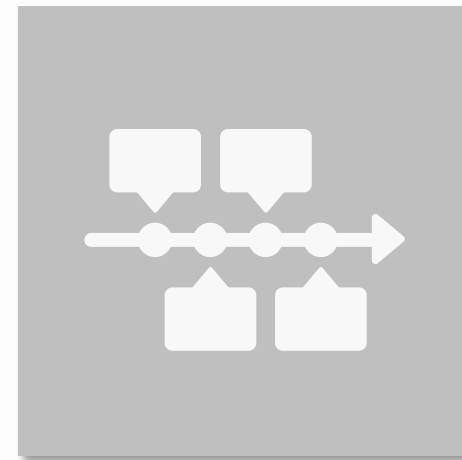**CONTINUOUS SEARCH FOR, AND CLOSING OF, PROCESS PERFORMANCE GAPS**

TregearBPM

LULU PROCESS DESIGN GROUP

OUR JOURNEY TODAY

Optimizing Your Journey to Excellence: Integrating Business Architecture, AI, and Process Management
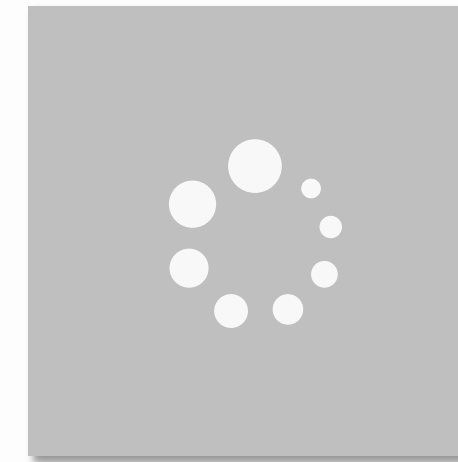
Baldrige Excellence Framework & Business Architecture

- Baldrige: a Compass for Success
- Fundamental Concepts of Business Architecture
- Alignment: Business architecture + Baldrige framework

AI + Process Architecture

- How to develop a process architecture
- Leveraging AI technologies to increase efficiency on process design
- AI + BPM Tips

Building a Culture for Active Process Management

- What is active process management?
- Key tools & techniques that help achieving process excellence

Augmenting Your Workforce Capability

- Tools and Tips for Effectively Preparing your People for Process Changes and for an AI-enabled future

LULU PROCESS
DESIGN GROUP

Tips for successfully transition your people to an AI future

Be Your Own Student

1
- Define a change you want to adopt to.
- Do the CM work on yourself.

Think Big, Start Small

2
- Think BIG – establish your IT long-term strategy.
- Start SMALL – define a business need and act on it.

Successfully transition to an AI-enabled future

Put Your People Front and Center

3
- Embrace a human-centered design approach through all phases of AI initiatives.
- Encourage your people to be the human in the loop.

Communicate Often and Tell It Like It Is

4
- Create a movement towards the AI journey.
- Design & deploy a comprehensive communication plan.
- Seek feedback and adapt.

Equip them with Knowledge

5
- Meet people where they are. Use ADKAR (or other) to define the barrier point.
- Equip them with the facts, guidance, and training needed to adopt to changes.

Connect People to One Another

6
- Build a coalition of first adopters, leaders and AI experts.
- Enhance your culture with a sense of curiosity, teamwork and ownership towards AI initiatives.

LULU PROCESS DESIGN GROUP

BPM Practitioner | AI Integration

MY BPM Exclusive Activities	AI Collaboration Activities	AI Automation Activities
Work I need to do it myself	Work I can do with AI to improve productivity and outputs	Work AI can do completely for me or on my behalf
This category identifies tasks that are best suited for humans due to the complexity of human interaction, emotional intelligence, ethical considerations, or intricate decision-making.	These are tasks where AI can assist, enhance, or augment human capabilities, making processes more efficient or insightful without fully replacing the human touch.	This category includes tasks that AI can fully automate, where human intervention is minimal or unnecessary, optimizing processes, and reducing the need for human labor in repetitive or predictable tasks.
Exercising judgment to align business strategy with the design of the process architecture	Generate v0 of a business process architecture with GenAI	Automating routine task-level process activities
Leading & facilitating process design sessions	Data analysis: employing AI-enhanced process modeling software to simulate process scenarios and analyze process risks	Compiling process analytics
Project Leadership: resolving team conflicts, negotiating project scope, driving team motivation, overseeing phases of deployment	Data analysis: employing AI-enhanced process modeling software to simulate process scenarios	Generating meeting summaries and action items
Managing resistance to change	Create change management plans with GenAI	Managing process performance
Managing stakeholder relationships	Analyze process adoption after implementation.	Generate improvement insights based on process performance
Fostering cross-functional collaboration	Streamlining data collection systems	Predict process performance and risks
Coaching and mentoring process owners and practitioners	Developing process documentation	Conducting quality audits on process documentation

LULU PROCESS
DESIGN GROUP

GenAI + BPM -
"Cheat Sheet"

AI + BPM Cheat Sheet
For Process Practitioners

LLM / BRAINSTORM	PROCESS DESIGN	PROCESS DOCUMENTATION	PROCESS MODELING
ChatGPT Plus	Process Mapper AI	BPMN gpt	Lucidchart
Copilot	Copilot	Process Pro Plus	iGrafx
Google Bard (GEMINI)	GBTEC - Arty		GBTEC - Arty
			Process Mapper AI

CHANGE MANAGEMENT	PERFORMANCE MANAGEMENT	COPYWRITING	
Kaiya	Signavio	Literature Review Writer	
Change Leadership CoPilot	Perceptif	SOP Builder (Standard Operating Procedure)	
AI Ready - Your Change Coach for Generative AI	MEGA International	SOP Writer Pro	
	Grammarly		

PRODUCTIVITY	PRESENTATIONS	LANGUAGE TRANSLATORS	IMAGES & GRAPHIC DESIGN
Canva	Beautiful.ai	Translate any Language | Best Translators	Canva
PDF Ai PDF	PresentationsAI	DeepL	Photoshop
NotionAI			DALL-E-3
			Midjourney

CREATED BY LULU PROCESS DESIGN GROUP, LLC
For More Information on BPM + AI, Contact Us | https://luluprocessdesigngroup.com

Your Journey with AI + BPM | Practical Tips

Leverage AI to re-engineer processes
- Process analysis skills are augmented with AI technologies. Leverage AI to make your processes more agile.
- Become a problem-finder & define business needs for AI initiatives.
- Assist AI researchers with your business & process knowledge.

5

Identify enterprise-wide opportunities
- Identify where you are generating large quality data.
- Re-examine the business process architecture, what could be re-engineered?
- Evaluate your data strategy execution – we must have quality data!

4

Engage people early in your journey
- "**They know best**" – encourage your workforce to identify process pain points. Celebrate quick-wins!
- Invest on AI training to enhance skills.
- Focus your people on using their human judgement & decision-making to solve complex issues.

3

Help executives build an AI strategy
- Leverage large data AI models to re-evaluate the business (business ecosystem, Strategic Model, Business Model, etc.).
- Define the AI strategic roadmap, including near-term wins & long-term opportunities.

2

START! – Be the human-rep
- Engage with AI & document your journey (prompts, data, real cases, accuracy).
- Identify and plan on off-loading your own repetitive tasks.
- Share your experiences and best practices.

1

34

Key Takeaways from Our Journey Today

Optimize your journey towards **business excellence** by designing your **Business Architecture**, and actively managing your **Business Processes**.

01 **Process Excellence drives Business Excellence**
Integrate Baldrige - a compass for excellence, **+** Business Architecture to systematically achieve high performance.

02 **The M in BPM is for Management**
Performance is the lifeblood of process management.

03 **Augmented Capabilities**
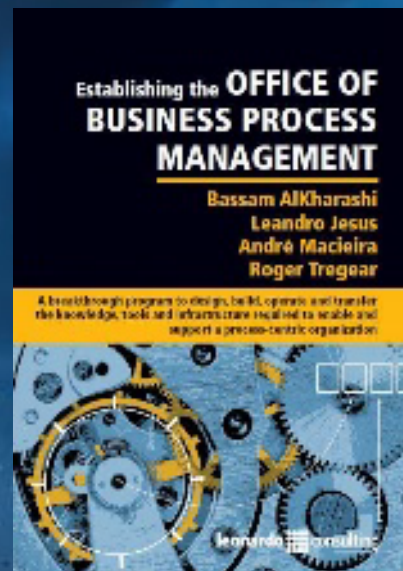**Engage your people** on process and technology changes, equip them with knowledge, learn together and celebrate the wins.

04 **AI Technologies**
Are revolutionizing the way we do process design and improvement, augmenting our capacity to innovate in processes. **Play with AI!**

35

Free download at Roger's website!
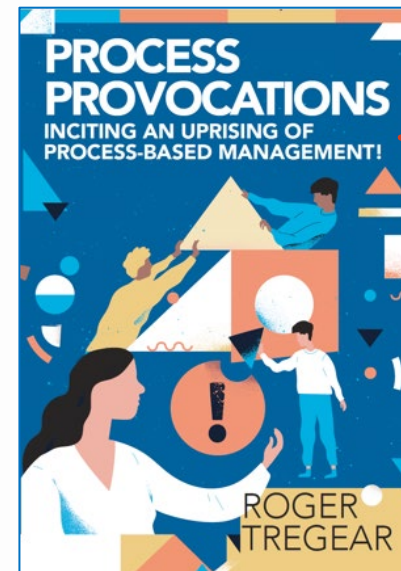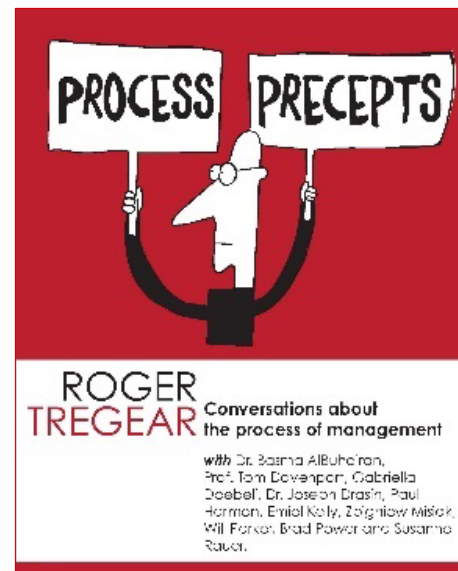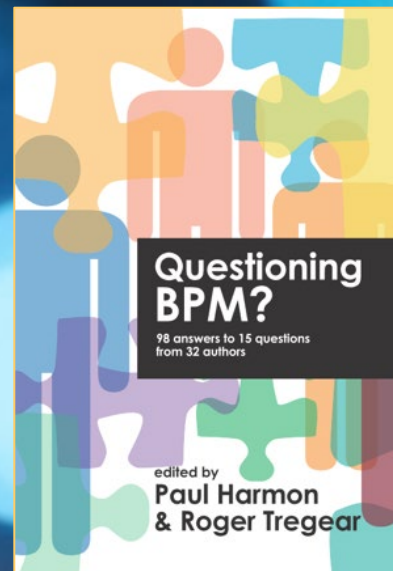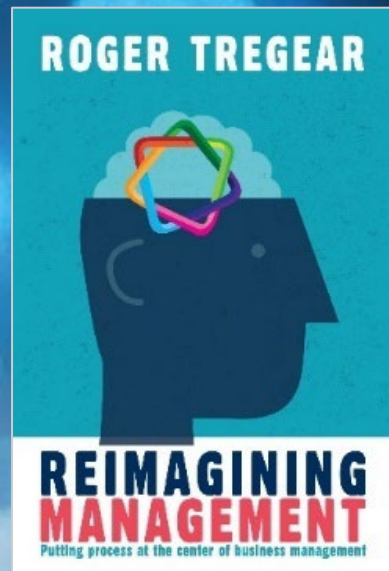
Free download at Roger's website!

Roger Tregear
Tregear BPM
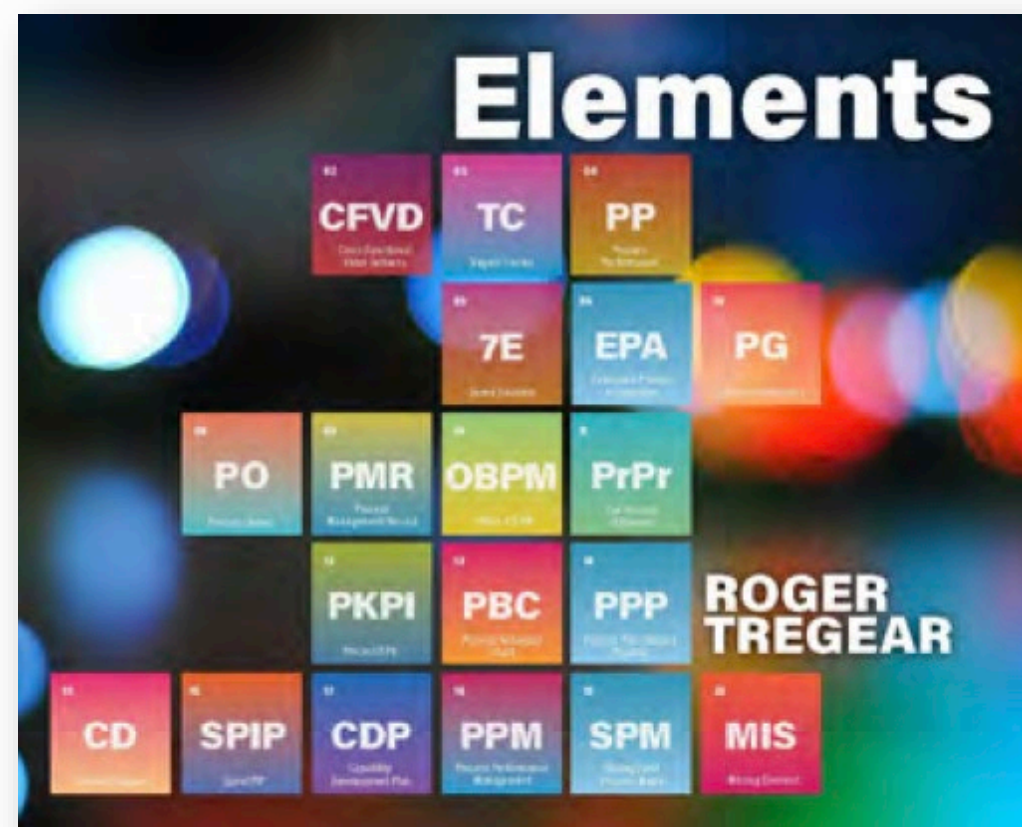
Thank You!

Lourdes Gonzalez
Lulu Process Design Group

+208-602-0513 || lourdes@lulupdg.com || www.luluprocessdesign.com

Panelist Questions and Discussion

Lourdes Gonzalez
Principal Advisor
Lulu Process Design Group

Al Faber
President & CEO
Baldrige Foundation
(Moderator)

Training & Professional Development

The Baldrige Foundation Institute for Performance Excellence supports individuals and organizations around the world by providing 400+ quality educational programs. Enroll today in some of our healthcare courses, such as:

- Artificial Intelligence for Marketing Professionals
- Leadership for Women in Business

To learn more, visit:
www.baldrigefoundation.org/education

BALDRIGE FOUNDATION
America's Best Investment

Mac Baldrige Society Institute Trustees

The Baldrige Family
Midge, Molly, & Megan

A Special Thanks to Our Donors & Sponsors!

STRATEX SOLUTIONS

AEHiS
Association for Executives in Healthcare Information Security

ALAMO COLLEGES DISTRICT

American College of Healthcare Executives
for leaders who care

Beyond Feedback

CAMC Health System

CHiME

DALLAS COLLEGE

DONOR ALLIANCE
Organ & Tissue Donation

ELEVATIONS CREDIT UNION

LULU PROCESS DESIGN GROUP

Mid·America TRANSPLANT
inspired by life

The Synergy Organization
Transforming Healthcare Organizations, Lives & Careers Through Science

SANPEC

Competitive Solutions Inc.

KaiNexus

WALDEN UNIVERSITY
EDUCATION FOR GOOD™

AdventistHealth

Stellar SOLUTIONS
25 YEARS
LEADING THE WAY

USA Midway

FREESE AND NICHOLS

ABOUT™

TATA

Mid·America TRANSPLANT
inspired by life

CORE
Center for Organ Recovery & Education

adani

SANPEC

Southcentral Foundation

ONE MESA™