The Baldrige Foundation Institute for Performance Excellence Presents:

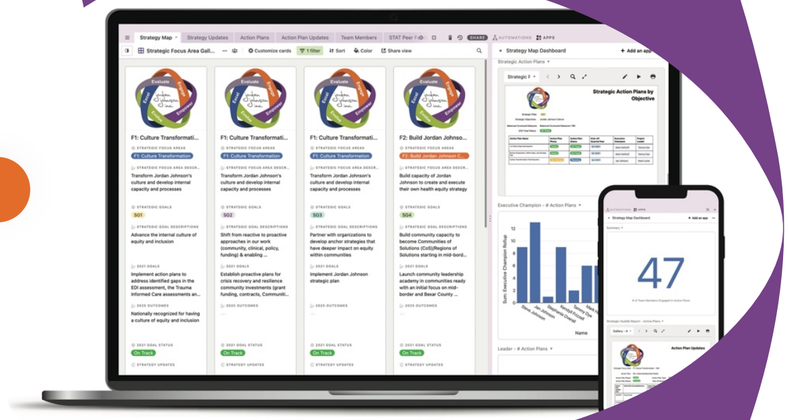
Process Digitization Made Simple by the Performance Excellence Operating System

August 26, 2021

Opening Remarks/Agenda

Introduction	Al Faber, President & CEO, Baldrige Foundation
Guest Presenters	Jan Johnson, President & CEO, Jordan Johnson, Inc
	Travis Lozier Chief Culture and Quality Officer, Jordan Johnson, Inc.
Questions	Moderator
Closing Remarks	Al Faber

Process Digitization Made Simple Through the Performance Excellence Operating System™



Jordan Johnson, Inc.

Jan Johnson and Travis Lozier

About us

Jordan Johnson, Inc

Mission: *Facilitating Extraordinary*

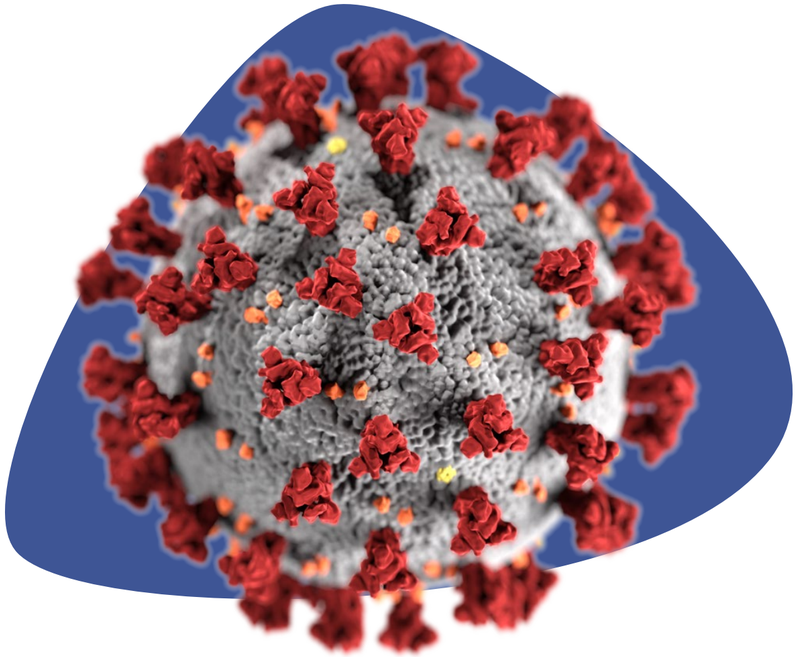
Vision: *To be your inspirational partner - shaping potential into power*

Values:

- *Committed*
- *Brave*
- *Fellowship*
- *Visionary*
- *Curious*

Catalyst for Change

Digitization and Digital Transformation
(Important and Urgent)



Digitization and Digital Transformation
(Important not Urgent)

History

Pre-Pandemic

< 2019

- In person collaboration
- Physical visual management processes and tools
- Low urgency/importance to adopt process discipline

Pandemic

2020-Present

- Virtual collaboration
- Virtual visual management process and tools
- High urgency/importance to adopt process discipline

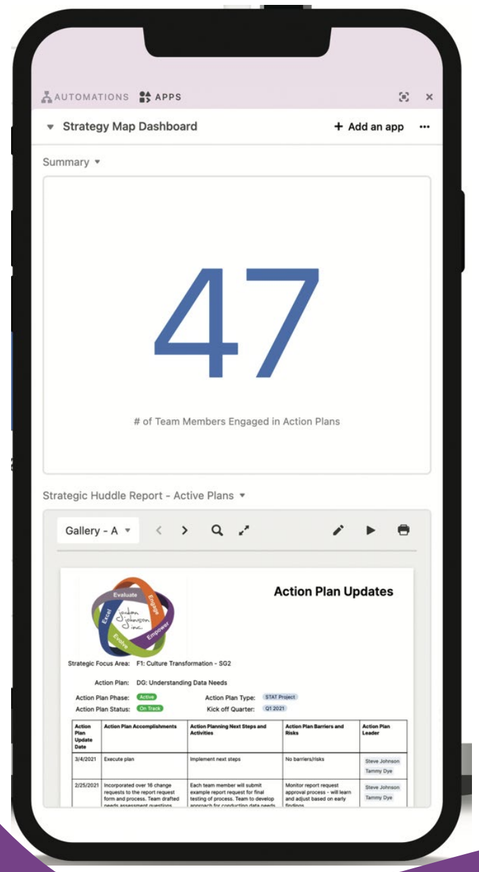
Post Pandemic

> 2022

- Hybrid models
- Continued acceleration of digitization adoption
- High urgency/importance to adopt process discipline

2021-2022 Baldrige Criteria introduces concepts around digitization and cloud-based technology

Where it all Started - Hill Country Memorial



Physical Project Huddle

March 2020 converted physical executive huddle to digitized process

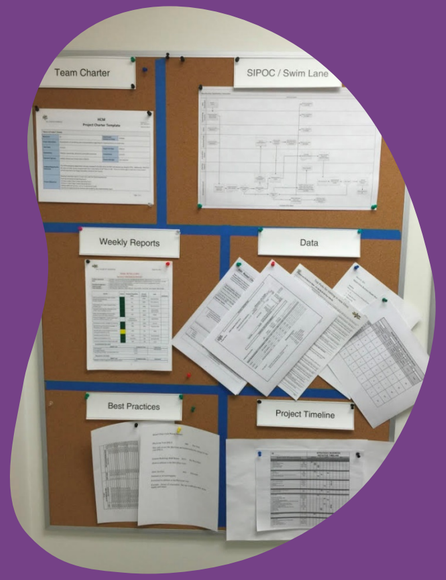
Align and Integrate

Aligned, integrated, digitized strategy and performance excellence processes

Spread and Share

2020-2021 additional processes digitized developed and deployed

How it Started | How it's Going



What is PEOS™?

The Performance Excellence Operating System™ aligns and integrates critical strategic and operational functions with more than 100 years of best practice experience to empower world-class performance and results.

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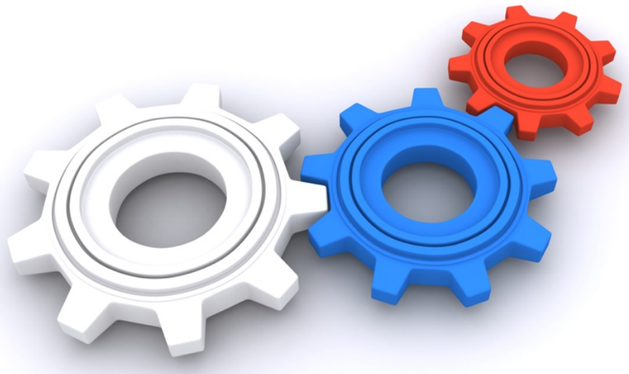


= PEOS™

- Performance Excellence Best Practices
- Jordan Johnson Team Knowledge and Experience
- Problems Needing Solved

The Problem	The Solution
Key organizational approaches relied heavily on files, emails, meetings – low process discipline	Digitize key organizational processes and and minimize reliance on files, emails, and meetings
Data stored in files is not being converted to organizational knowledge and wisdom	Make better decisions by converting data into organizational knowledge and wisdom
Rework and waste associated with finding, editing, developing new organizational assets with similar information	Leverage and segment data and information for different stakeholder groups without duplicating efforts and creating multiple files
Routine process tasks consume time and resources	Automate routine tasks and activities and give your team members time back and create repeatable and reliable processes

Digitization – Strategy Update Example

Strategy Update Reminder Email Sent by COO (10-15 min)

Strategy Update Owner Create and Develop Custom Materials in PPT/Excel (120 – 240 min)*17

Strategy Update Owner Emails Materials to COO (10 – 15 min)

COO Builds Comprehensive Strategy Update Materials (120 – 240 min)

*This organization tracks 17 Strategic Focus areas. Process is conducted quarterly.

Process time: ~36 – 72 hours

Annual time: ~144 – 288 hours (~18 – 36 days to complete strategy update process)

Digitization – Strategy Update Example

Automated Message Sent from PEOS based on Strategy Update Calendar (0 min)

Strategy Update Owner Researches and Gathers Key Update Information (30-60 min)*17

Strategy Update Owner Completes Strategy Update Form in PEOS (10-15 min)

PEOS Automatically Formats and Displays Strategic Update Information (0 min)

Savings of 14 – 27.5 Days Annually

*This organization tracks 17 Strategic Focus areas. Process is conducted quarterly.

Process time: ~8 – 17 hours

Annual time: ~32 – 68 hours (~4 – 8.5 days to complete strategy update process)

Digitization – Project Activation Example

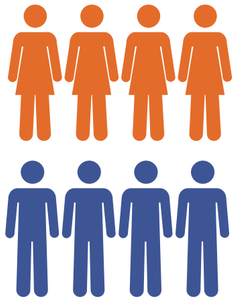
Project Selected

Email Project Sponsor (10-15 min)

Email Project Leader (10-15 min)

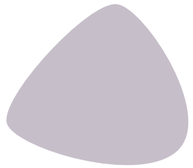
Email Project Team (10-15 min)

Find and Share Project Documents (20-30 min)



An example of a routine process that occurs frequently for organizations that consumes valuable time and resources

Small Inefficient Processes Add Up 50 – 75 minutes for every project



Digitization – Project Activation Example

Congratulations! [redacted] Project Kickoff and Project Information.

Congratulations you've been selected to be a key team member for an upcoming [redacted] project. Below are a few details about your project:

- Project Sponsor: [redacted]
- Project Leader: [redacted]
- Project Facilitator: [redacted]

- Project Details:
  - Project Name: [redacted]
  - Project Opportunity Statement: [redacted]

Attached to this email are important documents to help you and your project team be successful.

- Project Charter: Use this document to help lead your team and review with your sponsor for formal approval.
- Project Roles and Responsibilities Document: Use this as a reference document to ensure role clarity of project leader and facilitator/Green Belt roles.
- A3 Document: Use this document to help you navigate your [redacted] project. Please connect with [redacted] for additional support and training.
- Virtual Project Checklist: Guide for helping you navigate projects in a virtual environment.
- [redacted] Weekly Reporting Process: Process map illustrating weekly SBI reporting process.
- Link to Electronic Whiteboard (Miro): Feel free to use this electronic whiteboard to facilitate project meetings [redacted]

What now?

As the project leader please begin working with the project sponsor and facilitator to develop the project team, complete the charter, better understand problem/opportunity statement and schedule project team meetings.

We are committed to your success. If you have questions or need additional

Project Selected

Project Activated in PEOS and automation sends emails and key project documents (5-10 min)

Automation eliminates routine tasks and activates.
5 – 10 minutes

Savings of 45 – 65 minutes per project

Process Digitization – Limitless Opportunities

- Manual processes
- Processes that currently have variation and waste
- Processes that require routine/frequent follow ups
- Processes that require development and sharing various information/file types
- Processes that create organizational knowledge but are not being effectively leveraged
- Processes that require frequent emails or meetings

The days of technology dictating processes are over!

Performance Excellence Operating System
Best Practices Modules

- Strategic Planning and Deployment
- Performance Excellence
- Project Management
- Goal Cascade / Virtual Alignment Board
- Data Governance / Baldrige Category 7
- Succession Planning
- Supplier and Vendor Management
- Ideas and Innovation
- Employee Reward, Recognition and Wellness
- Enterprise Process Model
- Meeting Management

New features and functions added every week!

Testimonials

“

We are using the PEOS™ to digitize many of our organizational processes. This is saving our team members time and driving accountability in key processes that deliver results.

Rita Urbanek
Administrative Director
Hill Country Memorial

PEOS™ Modules/Processes Digitized

- Strategic Planning and Deployment
- Performance Excellence
- Project Management
- Goal Cascade / Virtual Alignment Board
- Data Governance / Category 7
- Succession Planning (Pilot Phase)
- COVID Vaccine Registration Clinic (over 16,000 registered)

Testimonials

“The PEOS™ is going to be a game-changer for USF Federal Credit Union in terms of managing our dashboards. We can easily share our metrics with our employees and our board of directors using the same toolset.

James Stock
Chief Technology Officer
USF Federal Credit Union

PEOS™ Modules/Processes Digitized

- Strategic Planning and Deployment
- Project Management
- Employee Recognition Program
- Ideas / Innovation Portal
- Enterprise Process Model (Business Process Management)
- Data Governance/Category 7

Testimonials

“The PEOS has been instrumental in enhancing THA’s organizational alignment across departments and levels, and increasing transparency and communication among the staff. It is incredibly helpful to have a central repository for our performance and historical data and has come become vital to our organizational decision-making process.

Mitzi Ressmann
Chief Operations Officer
Texas Hospital Association

PEOS™ Modules/Processes Digitized

- Strategic Planning and Deployment
- Organizational and Departmental Scorecards
- Data Governance / Category 7 Module

Testimonials

The PEOS's project management tracking and project dashboards give a real-time view for enhanced organizational performance. The automation features that we've built into the system has made our lives easier and increased our ability to be disciplined and consistent with project updates.

Courtnay Sanderfer
Vice President, HR & Organizational Excellence
USF Federal Credit Union

PEOS™ Modules/Processes Digitized

- Strategic Planning and Deployment
- Project Management
- Employee Recognition Program
- Ideas/Innovation Portal
- Enterprise Process Model Module
- Data Governance/Category 7 Module

Performance Excellence Operating System

Costs

- Jordan Johnson, Inc. and the Baldrige Foundation have formally partnered to offer the PEOS™ to members at a reduced rate
- Jordan Johnson, Inc. is committed to offering the PEOS™ at a low cost of lifetime ownership
- Initial cost of the PEOS begins at $75K and increases based on organizational size
- Annual maintenance costs begin at $10K

Benefits

- Quick Implementation and Deployment. PEOS™ can be deployed in ***weeks*** not months/years
- Dedicated support resources allocated from the Jordan Johnson, Inc. team
- PEOS™ Super-User and Admin training
- Access to Annual PEOS™ User Group Conference (2021 session tentatively planned for December 8th)
- Members of Baldrige Foundation gain access to specific PEOS™ community message boards and other Institute privileges

Thank you!

We would love to share more –
please connect to schedule a free demo

www.jordanjohnsoninc.com

Jan - (210) 872-6538 (call/text)
Travis - (812) 841-4731 (call/text)

Jan – jjohnson@jordanjohnsoninc.com
Travis – tlozier@jordanjohnsoninc.com

Panelist Questions and Discussion

Jan Johnson
President & CEO
Jordan Johnson, Inc.

Travis Lozier
Chief Culture and Quality Officer
Jordan Johnson, Inc.

Al Faber
President & CEO
Baldrige Foundation
(Moderator)

BALDRIGE FOUNDATION
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GROUP PURCHASES

Empower Your Team with Lean Six Sigma

Are you looking to enroll your team/group into one of our programs? If so, contact us to pay for all accounts at once. We will then provide you with an activation link that your team can follow to begin the program.

GLOBALLY RECOGNIZED CERTIFICATION

Invest in Education for Your Team.

Earn a globally recognized certification that you can add to your resume and attach to your LinkedIn profile.

PRICING

Lean Six Sigma Standard

White Belt - $50
Yellow Belt - $99
Green Belt - $157
Black Belt - $299

Lean Six Sigma Healthcare

White Belt - $50
Yellow Belt - $99
Green Belt - $157

Additional Programs

Scrum Master - $299
Diversity & Inclusion Yellow Belt - $99
Project Management - $157
Data Analytics - $199

View Our Entire Course Catalog Here:

https://www.baldrigeinstitute.org/online-training

What People are Saying…

"I appreciated the opportunity to take the Yellow Belt Course online and at a pace that was appropriate for me given my full-time work and family."

Melanie Powell
Director of Business Development and Marketing for Memorial Hospital and Health Care Center

The Baldrige Yellow Belt class is thought provoking, educational, relevant to the healthcare setting and a true investment in the future of healthcare."

Roxanne M. Williams, MSN, RN, CHC, CPHQ
Director of Corporate Quality, Associate & Patient Safety at Blanchard Valley Health System

"The case studies with actual healthcare examples helped me relate the content to real world scenarios that healthcare professionals face on a daily basis. The tools were organized in a way that helped me understand and build on my knowledge. I enjoyed the content and believe the course will make me more effective ..."

Todd Jordan PA-C, MBA
Director, Vascular Center of Excellence
CAMC Health Systems, Inc

BALDRIGE FOUNDATION

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AEHIS Association for Executives in Healthcare Information Security

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American College of Healthcare Executives — for leaders who care

Beyond Feedback

CAMC Health System

CHiME

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