Redesigning Workflows for the AI Era

PRACTICAL APPROACHES TO PROCESS AUTOMATION

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Agenda

1. Diagnosing Workflow Failure
2. Redesigning the Flow Around AI
3. Keeping Control Over Routing, Review, and Action
4. Running the Pilot and Testing It on Your Own Workflow
5. Next Steps

Workflow problems start before review

What the system shows

- Intake
- Route
- Queue
- Review
- Final action

What people are doing

- Fixing routes in email
- Tracking exceptions in spreadsheets
- Adding missing details by hand
- Moving items quietly from one queue to another
- Leaving no clear record of why

Bottom line: The hidden work is part of the process

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One packet shows the old design failing

Incoming packet

- Claim notice
- Police report
- Estimate
- One missing field
- One policy number in the email
- A different policy number on the form

What the old process does

- Sends it to the wrong queue
- Forces an analyst to check another system
- Forces the analyst to fix the data
- Forces the analyst to reroute the packet
- Loses part of the correction history

Find the step that staff still have to interpret

Mark these points

- Where work leaves the system
- Where someone has to read and decide what the item means
- Where one item fits more than one category
- Where rework piles up
- Where the record becomes weak
- Where the next action carries legal, money, or compliance impact

First redesign target

The step where people still have to read, judge, and fix the packet

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Use the workflow to read the packet earlier

New path

- Intake
- Read and sort the packet
- Choose the next step
- Send it forward, send it for review, send it back for correction, or stop it
- Keep the final action with the named person
- Keep a record of what happened

What changes

- The workflow reads more of the packet before a person has to
- The process decides earlier where the item should go
- Fewer fixes happen in side channels

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Keep fixed rules, content reading, and final decisions separate

Use fixed rules for

Retention

Access checks

Standard checks

Fixed calculations

Use the new AI step for

Sorting documents

Pulling out key details

Linking related files

Setting priority

Choosing the next queue

Keep with a named person

Approval

Denial

Waiver

Payment release

Records disposal

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Decide what the system may do by itself

Good first uses

- Tag the item
- Fill in basic details
- Link related files
- Send the item to the right intake queue

Use review before acting

- Set priority
- Choose a hard exception path
- Draft a response

Keep manual first

- Payment release
- Denial
- Sanctions action
- Records disposal
- Policy waiver

Rule: The harder it is to undo, the less the system should do by itself

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Set review, correction, and stop paths before the pilot

Common problem types

- Missing required information
- The packet could fit more than one category
- The information conflicts
- The source material is weak
- The tool fails

Bottom line: Every problem type needs an owner and a next step

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Show how the new design handles messy input

Packet condition	What the workflow does
Missing required information	Sends it back for correction
Poor scan quality	Sends it to review
More than one claim type in one packet	Sends it to review
Conflicting policy data	Stops it

Bottom line: Messy input should not force the work back into email and spreadsheets

When one step gets better, the next queue fills

Insurance case

- 3,743 claims over 5 months
- Claim handlers identified 68 claim parts
- AI identified 1,034 claim parts
- 1.82% versus 27.62% of claims with identified claim parts
- The next limit was investigator capacity

What this means

- Improving one step does not finish the redesign
- The next queue becomes visible
- The process still has to be redrawn after the first gain

These numbers come from the 2025 insurance case study on AI-enhanced process automation using object-centric process mining. The paper reports the large increase in identified claim parts and the downstream capacity limit in investigation

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The record must show what the system saw, what it did, and who changed it

Keep this record

Source item and version

Source text pulled in to support the step, if used

What the system produced

Which path the item took

Any human override

Final result

Review over time

Problem rate

Override rate

Repeat mistakes

Changes to the step

Incidents

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Each workflow step needs a rule, an owner, and a review path

What must be set	Claims intake example
What the system may do	Sort and route intake packets
What goes to review	Medium certainty or conflicting data
Who owns the step	Claims operations lead
Who approves changes	Process owner and control owner
How often results are reviewed	Weekly exception review, monthly sample review

Bottom line: The step is not ready until these five items are set

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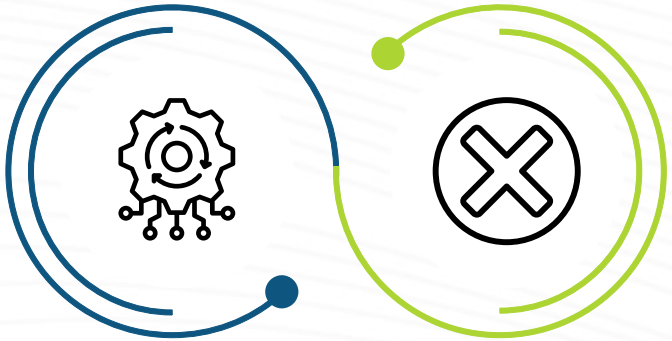
Keep these steps manual in the first pilot

Do not automate these steps first

- Payment release
- Adverse customer action
- Coverage denial
- Sanctions action
- Records disposal
- Policy waiver



Do not move closer to system-led action until all five exist

- Named owner
- Tested review path
- Full record of what happened
- Approved rule for what the system may do
- Written stop condition

Run one pilot and watch the next queue

90-day pilot

- Weeks 1 to 2: Measure the current process
- Weeks 3 to 4: Redesign one step
- Weeks 5 to 6: Set review rules, destinations, owners, and records
- Weeks 7 to 10: Run the new step with review in place
- Weeks 11 to 12: Inspect overrides, rework, and the next queue
- Week 13: Expand, revise, or stop

Measure

- Wrong-route rate
- False escalation rate
- Manual correction rate
- Override rate
- Completeness of the record
- Growth in the next queue

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Work one of your own workflows

Write down

01 Where does work leave the system today?

02 Which step still depends on someone reading and deciding?

03 Which action must stay with a person?

04 What sends the item to review?

05 What must the record show later?

06 What stops the pilot?

Final rule

If the owner cannot state the review path, the override rule, and the record that must exist, keep the step manual

Thank You

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