

From Framework to Flow

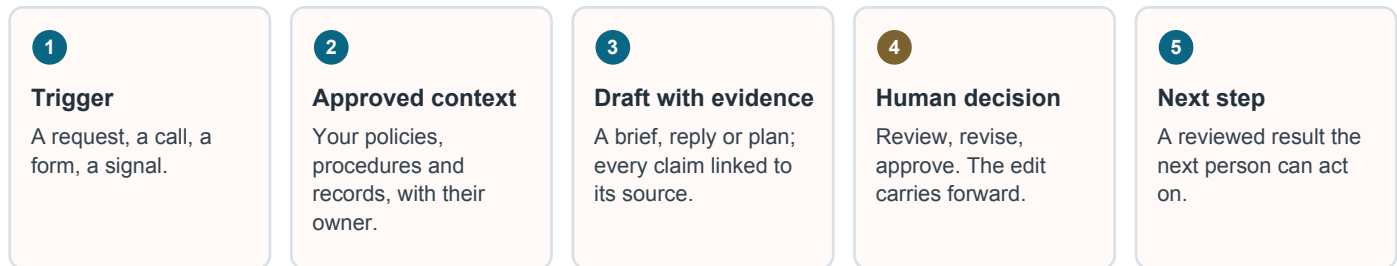
The Phaneuf journey from business operating system to intelligent, Capillary action.

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Baldrige provides the framework. AI accelerates the flow. People create the value. Human flourishing gives it purpose.

Your operating framework already says what good looks like. The gap is in the working day: a request arrives, someone has to find the right guidance, draft a response, make a judgment call and hand the result to the next person. Capillary Actions carries approved sources into that moment, produces a draft with its evidence attached, and keeps a person at the decision.

HOW ONE PIECE OF WORK MOVES



The human decision is the center of the design, not an exception path. A generated draft is not a completed task.

THE PHANEUF JOURNEY

FIRST CALL

An after-hours voicemail becomes the complete first-call form the team already uses. Unknown values stay blank, uncertainty is preserved, and staff review before anything is acted on.

STAFF KNOWLEDGE

Employees ask policy, pricing and procedure questions and get answers grounded in Phaneuf and Cremation Society of New Hampshire sources, with citations.

FAMILIES AND THE PUBLIC

Front-door assistants designed for grief-adjacent conversations that hand off to a person by phone, email or form.

WHAT WE LEARN

Which tasks staff return to, what they correct, which exceptions remain, and what the baseline was before any claim of improvement.



CONTINUE AFTER THE SESSION

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Try the interactive example, download this worksheet, or ask for a 30-minute working session on one of your own recurring tasks.

Working with ExcellenceNorth Alliance?
Mention Brian and we will coordinate with him.

Choose one workflow to improve.

Pick one recurring task and the person responsible for its result. Fill this in during the conference or with your team. It produces a process map and a decision about whether an evaluation is worth scoping. It commits you to nothing.

Trigger → **approved context** → **proposed output** → **human decision** → **next step**

Task	What recurring request or event starts the work? Keep it to one task.
People	Who does it today, who checks the result, who owns the process?
Context	Which documents or records are needed? Who approves and updates them?
Output	What specific artifact would be useful: a brief, a reply, a checklist, a plan?
Decision	What must a person verify, edit or approve before anyone acts?
Handoff	Where does the approved result go, and who takes the next step?
Exceptions	What uncertainty or sensitive request requires escalation?

BEFORE PROMISING IMPROVEMENT, RECORD A BASELINE

Volume Comparable requests in a stated period	Effort Time finding context, preparing, reviewing	Quality Missing facts, corrections, escalations	Adoption Who completes the task again	Cost to deliver Source prep, configuration, support
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DECIDE THE NEXT STEP

- Proceed to scoping when there is one useful output, a named owner and reviewer, available approved sources, a feasible handoff and an agreed way to judge the result.
- Prepare first when source ownership, permissions, task boundaries or the review method are unclear.
- Route separately when the task needs a new integration, sensitive records or substantial custom work.

Bring this page to a 30-minute working session.

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