



Business Management Institute

Fix the Process First

Why most AI projects fail before the AI arrives

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WACUBO 2025

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Agenda

Move from “we need an AI tool” to “what processes are we trying to improve?”

- 01 Frustration inventory** What administrative process needs help?
- 02 Why AI projects fails** People + process + technology
- 03 Travel reimbursement case** Map, insert AI, assess risk
- 04 Institutional capacity** Ownership, validation, accountability, skills
- 05 Monday morning exercise** Leave with a practical action plan



The Frustration Inventory

Start with the processes everyone wants to fix





What process frustrates your campus?

Vote by show of hands and then we'll crown a winner.

Travel reimbursement

Procurement

Hiring/onboarding

Budget requests

Contract review

Space requests

Other

These are the processes people instinctively want to “fix with AI.”



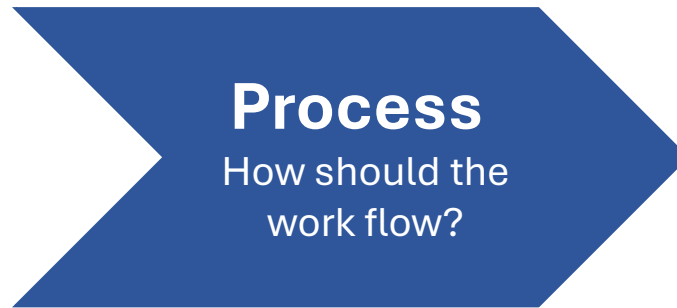
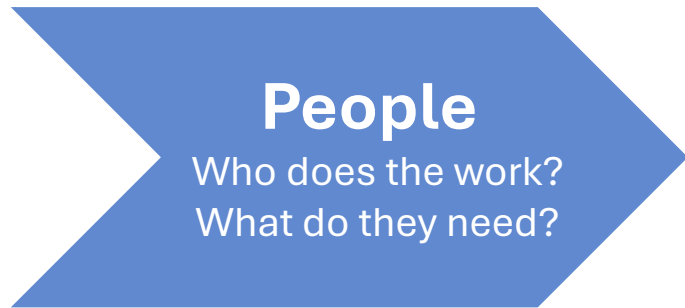
Why AI Projects Fail

The common misconception: “we need an AI tool.” The reality: “we have a process problem.”



People → Process → Technology

A healthy implementation starts with the work, not the tool.



AI hype often reverses the order.



Diagnostic question

Before “AI for X,” ask someone to describe X from end to end.

Can you describe the current process from start to finish?

If not, you do not have an AI problem. You have a process visibility problem.



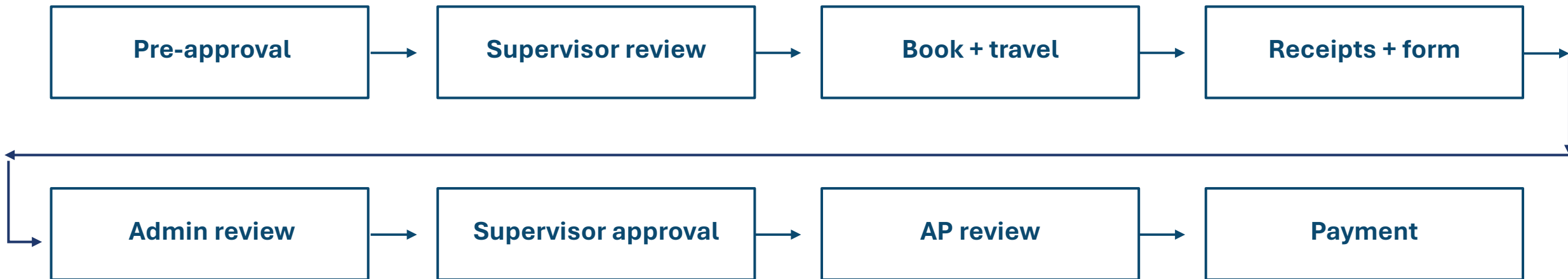
Case Study: Travel Reimbursement

Universal, frustrating, multi-stakeholder, compliance-heavy, and tempting to automate



Step 1: map the current workflow

Before inserting AI, make the process visible.



WHERE IT HURTS

3+ handoffs between offices

Same information entered twice

30+ days start to finish

Where does your version add steps, loops, or repeated information?

Step 2: where would you insert AI?

2-3 minutes of small group or individual reflection.

**Receipt scanning + data
extraction**

Policy compliance checking

Auto-routing by threshold

**Reminders for missing
documents**

**Summary dashboards for
leaders**

Other



Group decision: fund one intervention

2 minutes with your group. Be ready to defend your choice!

You have budget for exactly one AI intervention in this process. Which one do you fund (and why)?

Step 3: categorize the ideas

Assistant, decision-maker, or hidden risk?

Good uses: AI as assistant

Receipt scanning
Missing-doc reminders
Dashboards

Bad uses: AI as decision-maker

Autonomous approval
Judgment-heavy
exceptions
Unreviewed compliance
calls

Hidden risks

Misread amounts
Provost-negotiated
exceptions
PII in vendor systems



The redesign opportunity

Maybe the answer is fewer steps not smarter steps.

Threshold redesign

Could pre-approval be eliminated for travel under a certain amount?

Duplicate review

Are supervisor approval and AP review doing the same thing?

Handoff delay

Is the 30-day wait caused by queues between offices?

AI can support the redesigned process where it adds value.



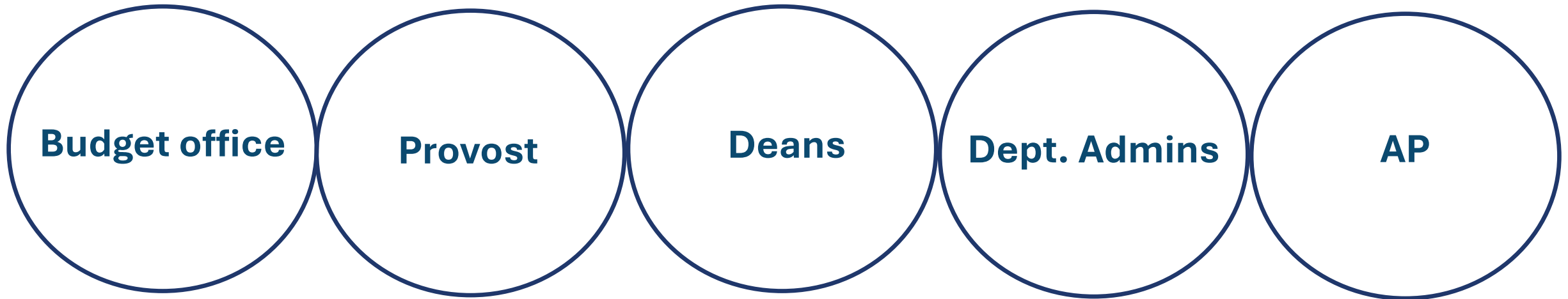
Institutional Capacity

AI requires governance structures, role clarity, and human capability



Capacity question 1: who owns the process?

Who is responsible when an AI-assisted recommendation gets it wrong?



Shared involvement is not the same as clear ownership.

Capacity question 2: who validates outputs?

Validation requires expertise, time, and authority.

Expertise

Know what “right” looks like

Time

Actually review before action

Authority

Override the AI when it is wrong

If validation isn’t resourced, it gets skipped.

Capacity question 3: who is accountable?

Answer before deployment, not after something goes wrong.

Administrator

Drafts with AI

Supervisor

Reviews and approves

CIO/IT

Approves tool

Vendor

Supplies system

Accountability should be explicit, documented, and understood by everyone in the process.

Capacity question 4: what skills do staff need?

AI doesn't eliminate expertise, it just changes where expertise is applied.

Before

Data entry, drafting,
routing

After

Validation, editing,
exception handling

Risk

Over-trust or refusal to
use

Introducing AI without training is introducing risk!

Let's score your campus!

For the process you named earlier, count your yeses on these 4 questions.

1

Can you name the owner?

One person, not a committee

2

Is validation resourced?

Someone has time, expertise, authority

3

Is accountability documented?

Written down, not assumed

4

Is training planned?

Staff know what to trust and check

**Hold up your fingers:
how many yeses?**

- ✓ **4? Ready to pilot**
- ✓ **2-3? Proceed carefully**
- ✓ **0-1? Fix the process first**



Monday Morning Exercise

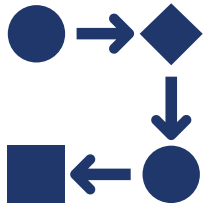
A four-step action plan you can take back to campus



Your four-step action plan

Do this with one process you can actually influence.

1



**Identify one
process**

Frustrating, slow, or
inconsistent

2



**Find the
bottleneck**

Where does it stall or
break?

3



**One place AI might
help**

Reduce friction, not
judgment

4



**One place AI
should not be
used**

Protect discretion and
accountability



Step 1: identify one process

My process: _____

What process frustrates people, takes too long, or produces inconsistent results?



Step 2: identify the bottleneck

Where does the process break down?

Stalls

Errors accumulate

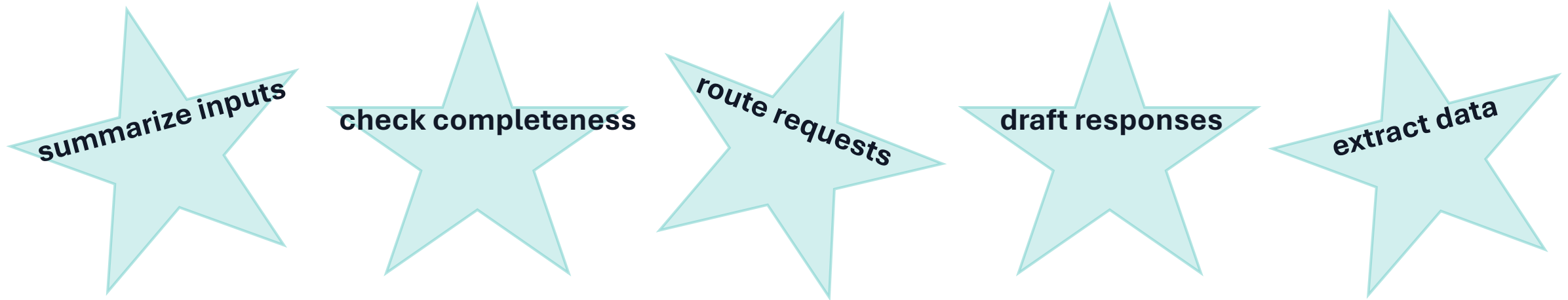
People complain

Ownership unclear

The bottleneck is where redesign begins.

Step 3: one place AI might help

Look towards reducing friction, not replacing decisionmakers.



AI should make the work easier to review, not harder to understand!



Step 4: one place AI shouldn't be used

Name a boundary before enthusiasm erases it.

Where is human judgment, institutional knowledge, or professional discretion essential?

The boundary is part of the design.



Debrief: share the four answers

1. **Process**
2. **Bottleneck**
3. **AI opportunity**
4. **AI boundary**



The leadership takeaway

This is an action plan, not a technology plan.

**AI doesn't transform institutions.
Leaders who understand their processes do.**

Process reality + role clarity + accountability

Thank you!

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