



## PROCESS EXCELLENCE ADVISOR III

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**Position Status:** Exempt  
**Reports To:** Department Leadership  
**Effective Date:** 02/27/23  
**Revised Date:** 01/01/24  
**Job Level:** P3

### POSITION SUMMARY

Under direction, this position:

1. Leads, supports, and consults on the planning and execution of medium- to large-scale process improvement engagements in collaboration with organizational partners
2. Serves as a process improvement resource, subject matter expert, trainer, and coach for organizational business partners and Process Excellence Advisor I/II's
3. Supports Business Process Management (BPM) objectives through participation in the development of process architecture and metrics
4. Performs other duties as assigned

### DISTINGUISHING CHARACTERISTICS

The Process Excellence Advisor III is the advanced working level in the Process Excellence Advisor series and is distinguished from the full working level Process Excellence Advisor II by the former's primary responsibility for leading the most complex large-scale process improvement engagements, consistent application of a high-level of process excellence expertise, and assisting with orienting, training, and mentoring less experienced Process Excellence team members.

### RESPONSIBILITIES

1. Leads, supports, and consults on the planning and execution of medium- to large-scale process improvement engagements in collaboration with organizational partners, with duties including but not limited to:
  - Identifying and assessing potential process improvement opportunities, analyzing alternatives, and producing recommended next steps
  - Developing process improvement engagement plans for the most complex medium- to large-scale engagements
  - Identifying resource requirements and building teams that promote mutual accountability, empowerment, and open dialogue to achieve process improvement goals
  - Identifying, managing, and escalating risks to mitigate adverse impacts to improvement efforts
  - Applying basic to advanced concepts, principles, theories, and techniques to systematically approach process improvement engagements
  - Determining and employing appropriate process improvement tools, such as data collection plans, process observations, run charts, process mapping, Pareto charts, and root cause analysis, to advance process improvement engagements
  - Identifying, tracking, and fulfilling process engagement deadlines, milestones, and deliverables
  - Developing sustainable plans to ensure ongoing process management by organizational partners prior to engagement conclusion

- Applying and promoting change management principles to support the success of process improvement engagements
  - Leading, coordinating, and participating in cross-functional planning and execution of process management projects, including leading and supporting team meetings and communicating project status
2. Serves as a process improvement resource, subject matter expert, trainer, and coach for organizational business partners and Process Excellence Advisor I/II, with duties including but not limited to:
- Identifying and utilizing models, concepts, strategies, and emerging process improvement practices into the Process Improvement Program
  - Representing Process Excellence in workgroups, committees, and other forums
  - Supporting data collection, analysis, and reporting activities to monitor organizational performance and identify opportunities for improvement
  - Identifying opportunities to implement process improvement activities in support of organizational, divisional, departmental and programmatic goals
  - Designing tools and templates for use in process improvement activities
  - Preparing and presenting summary reports of Process Excellence activities, outcomes and trends for appropriate workgroups and committees
  - Providing guidance, coaching, and support to organizational participants, at all levels of the organization, during process improvement engagements
  - Developing and facilitating ad-hoc and recurring training on process improvement methodology, principles, and techniques through hybrid teaching approaches, including didactic and hands-on
  - Responding to inquiries regarding process improvement policies and procedures
  - Acting as a technical resource and training, mentoring, and coaching Process Excellence Advisors I/II, as assigned
3. Supports Business Process Management (BPM) objectives through the development of process architecture and metrics, with duties including but not limited to:
- Supporting and collaborating with the Operational Excellence Director to fulfill responsibilities related to various aspects of BPM
  - Participating in the development and management of the Alliance's process architecture and framework, ensuring processes are consistently designed, documented, monitored, and optimized
  - Participating in the development and maintenance of a repository for process documentation to facilitate process transparency across the organization
  - Assisting with the development and maintenance of policies and procedures governing BPM
  - Functioning as a BPM resource for the organization and collaborating with Enterprise Project Management and Operations Business Analysis
  - Managing the enterprise performance measurement system to systematically monitor operational performance and recommending interventions when performance deviates from standards
4. Performs other duties as assigned

## EDUCATION AND EXPERIENCE

- Bachelor's degree in Industrial Engineering, Organizational Development, Health Care Administration, or related field and five years of process improvement experience (a Master's degree may substitute for two years of the required experience); or an equivalent combination of education and experience may be qualifying
- Lean Six Sigma Black Belt accreditation or similar accreditation in process improvement

## KNOWLEDGE, SKILLS AND ABILITIES

- Thorough knowledge of process improvement principles, methodologies, best practices, and tools
- Thorough knowledge of and proficiency in the application of BPM principles and capabilities, including the development and application of measurement systems, process governance, and change management.
- Working knowledge of research, analysis, and reporting methods
- Working knowledge of project management principles, methodologies, and tools
- Working knowledge of the principles and practices of change management
- Working knowledge of and proficiency with Windows based PC systems and Microsoft Word, Excel, Outlook, and PowerPoint, Visio, and Project
- Some knowledge of performance metrics and statistics
- Ability to evaluate complex systems and processes by identifying measures or indicators of performance and the actions needed to improve or correct performance, relative to the goals of the system or process
- Ability to understand, interpret, explain, and apply policies and procedures
- Ability to demonstrate strong organizational skills and attention to detail
- Ability to plan, organize and prioritize tasks, coordinate activities and projects, and adhere to timelines
- Ability to select and use appropriate methods when teaching new subjects
- Ability to demonstrate strong analytical skills to identify needed interventions and mitigate risk
- Ability to collect, manage and analyze data
- Ability to provide orientation, training and mentoring, and act as a technical resource to Process Excellence Advisor I/II's
- Ability to work on interdisciplinary teams as a team member or leader
- Ability to demonstrate excellent people management skills including team building, facilitating meetings, problem resolution, negotiating and influencing
- Ability to lead, motivate, coach, mentor, build investment and commitment and hold project team members accountable
- Ability to facilitate BPM conversations with stakeholders at all levels of the organization
- Ability to effectively manage change, and prioritize multiple projects, tasks, and deadlines
- Ability to develop training content and lead interactive, skills-based training
- Ability to compile and present summary reports to committees
- Ability to create forms, reports, correspondence, and other program documents and tools associated with process improvement engagements
- Ability to work independently with minimal supervision and as a member of a team

## DESIRABLE QUALIFICATIONS

- Master's degree in Industrial Engineering, Organizational Development, Health Care Administration, or a related field
- Training in change management principles
- Experience working with the Department of Healthcare Services (DHCS), Department of Managed Health Care, or other health care regulatory oversight bodies
- Working knowledge of process improvement in a health care environment
- Working knowledge of Medi-Cal, Medicaid, or managed care
- Working knowledge of health care delivery systems
- Working knowledge of performance metrics, statistics, and the principles of statistical process control

## WORK ENVIRONMENT

- Ability to sit in front of and operate a video display terminal for extended periods of time
- Ability to bend, lift and carry objects of varying size weighing up to 10 pounds
- Ability to work effectively in a remote work environment
- Ability to travel to different locations in the course of work

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*This position description, and all content, is representative only and not exhaustive of the tasks that an employee may be required to perform. Employees are additionally held responsible to the Employee Handbook, the Alliance Standard Knowledge, Skills and Abilities and the Alliance Code of Conduct. The Alliance reserves the right to revise this position description at any time.*