

DECISIONS™



processmaker

CAROLINAS CHAPTER SPRING MEETING

Reimagined and Governed AI-Enabled SAP-Centered Processes

Deploying AI into business operations without losing control, traceability, or human accountability

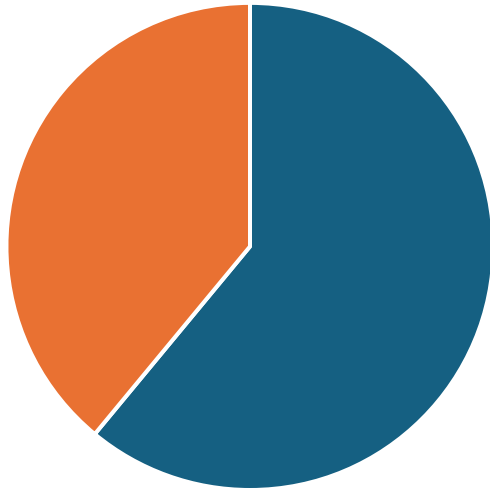
March 27, 2026

Chris Bugg, Senior Vice President, Decisions-ProcessMaker

Today's Agenda

- ▶ **Why this topic now**
The tension between AI mandates and enterprise control
- ▶ **How AI Fits Around SAP**
A clean-core, governed operating model
- ▶ **What it looked like at Fire Recovery**
A real customer case and the lessons learned
- ▶ **How to start safely**
The shape of a low-drama, governed pilot in an SAP-centered process

61% of CEOs say they are pushing gen AI adoption faster than some people are comfortable with.

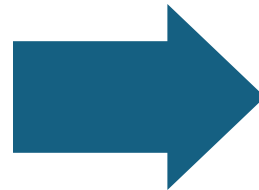


“Superagency in the workplace: Empowering people to unlock AI’s full potential”
McKinsey, 1/28/2026

The Tension SAP Teams are Living With

Pressure from the Top

- Show visible progress on AI
- Increase productivity without adding headcount
- Find use cases close to core business operations
- Move quickly enough that AI does not remain a lab exercise



The Reality on the Ground

- Business process still need deterministic control points
- Process owners need explainable outcomes and clean exception paths
- Security, audit and compliance teams need evidence after the fact
- IT needs change control, integration discipline, and the ability to inspect behavior

The question is not, “Must we use AI?”. The question is “How do we use AI without losing control?”

Why We Care about this Problem...

We implement business processes that orchestrate:



Data



Systems



People



Agents



Our focus is not just automation. It is *governed* automation:



Control



Accountability



Auditability



Exception Handling

Meet Fire Recovery

- Fire Recovery USA supports Fire and EMS departments nationwide.
- They generate invoices for over 2,000+ clients, each with their own billing rules, which are often embedded in municipal ordinances.
- They issue these invoices to insurance carriers, each with their own requirements for what constitutes a valid, payable invoice



2,000+ Clients

National Scope

Relevance to SAP-Centric, AI-Enabled Automation:

Fire Recovery's invoicing solution is an enterprise-class automation pattern because the core design choices are the same:

- Keep the system of record authoritative
- Let AI do ***bounded*** work with language and unstructured documents
- Use the Rules Engine to deterministically check around what becomes action
- Route exceptions to humans instead of pretending uncertainty is certainty

What AI Governance Means in Operations

AI governance = Deciding who can use AI, for what tasks, on what data, with what controls, under what oversight, and with what evidence afterward.

What can the Agent **do**?

- Draft?
- Extract?
- Summarize?
- Recommend?
- Classify?

What can the Agent **not** do alone?

- Final approvals?
- Threshold decisions?
- Posting logic?
- Policy exceptions?

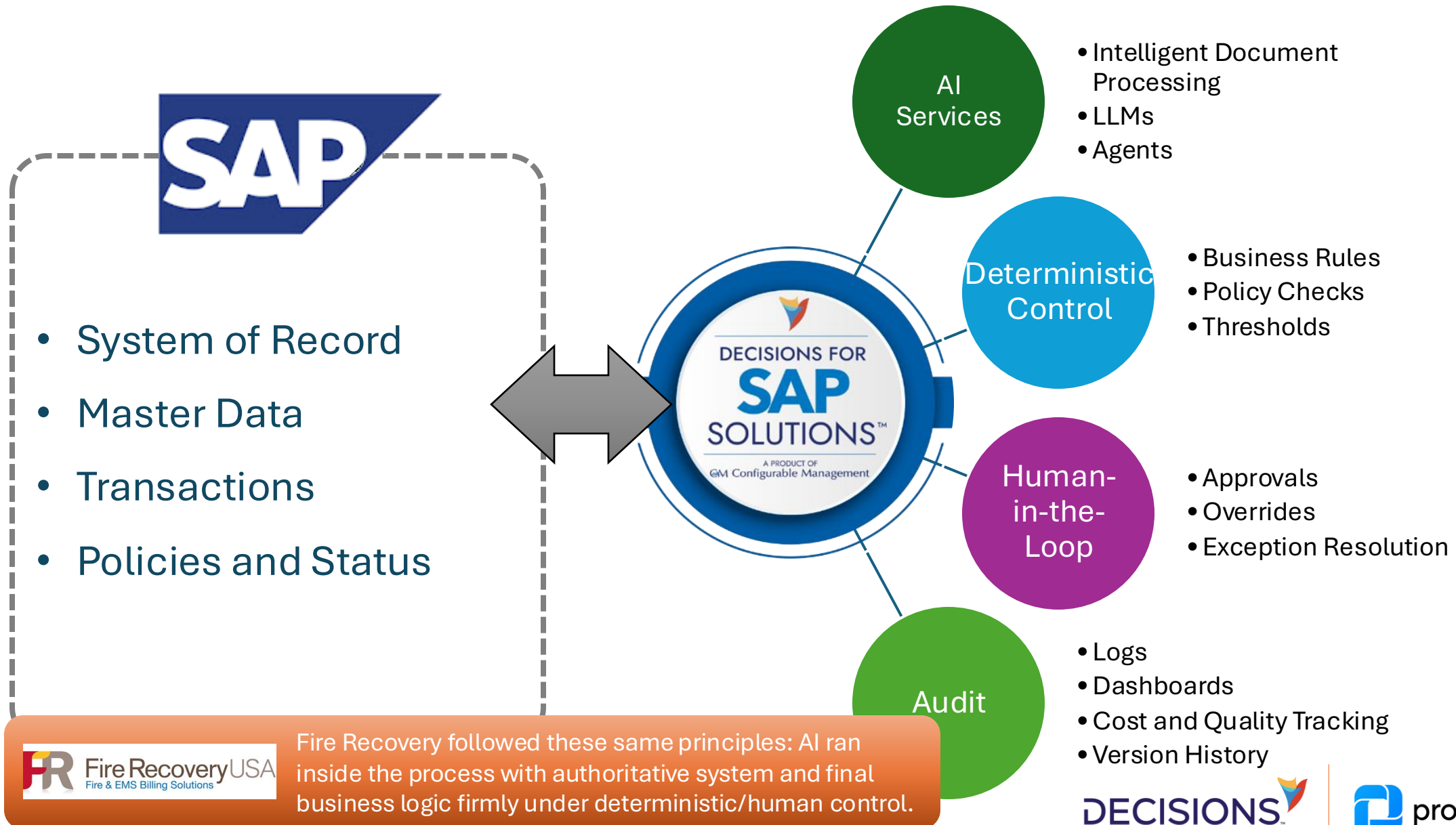
What **triggers** human review?

- Low confidence?
- Missing data?
- Policy conflict?
- Out-of-bounds behavior?

What **evidence** remains?

- Prompt/configuration?
- Input context?
- Rule results?
- Human action?
- Final system update?

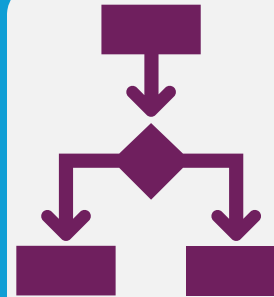
SAP remains the system of record. AI sits inside an orchestrated process with rules, exceptions, and evidence around it.





Safe Jobs for Agents

- Summarize unstructured narratives
- Extract fields from documents and emails
- Classify or propose next-best action
- Draft responses, explanations, or work-item descriptions
- Narrow large queues so humans review fewer cases



Keep Deterministic and Explainable

- Approvals, thresholds, and authority checks
- Eligibility logic and policy enforcement
- Segregation-of-duties and compliance control points
- Required-field validation and master-data standards
- Final disposition criteria before downstream system action

Let Agents generate possibilities; let rules and workflow govern what becomes action.

A Governance Stack for Agent-enabled Processes

1	Use-case Selection	Choose narrow, bounded work with clear business value
2	Data Grounding	Control the data and context the model may use
3	Model Orchestration	Call the right model for the right narrow task
4	Deterministic Validation	Apply rules before anything becomes action
5	Exception Workflow	Route anything uncertain or out of bounds
6	Human Accountability	Keep a named owner for decisions and overrides
7	Observability	Track quality, exceptions, latency, and cost
8	Change Control & Assurance	Version prompts, models, policies, and testing

None of these layers is enough by itself. Governance comes from the combination.

SAP Products





AI Chat Assistant

Connected to SAP Salesforce Microsoft 365

All Systems Operational

System Status

	SFDC	
	M365	
	Doc Extraction AI	
	SAP	

Recent Activity



No data to display



Ask anything about your business data...



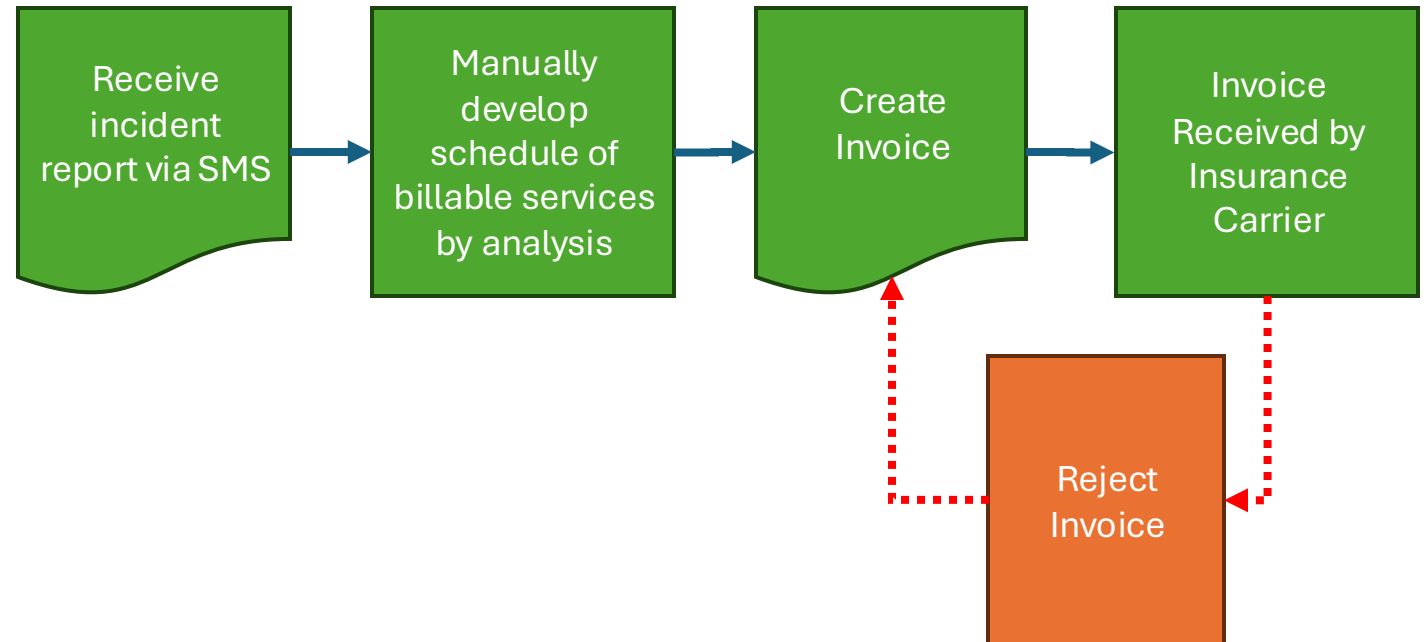
Fire Recovery USA Invoicing Prior to Decisions

Why the process hurt...

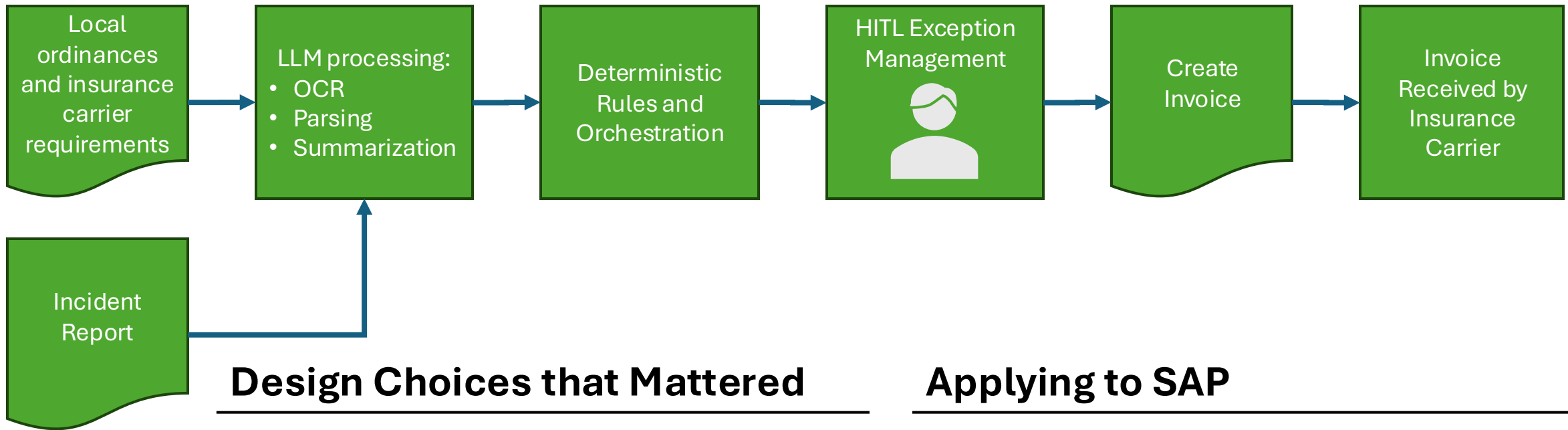
- 14,000 invoice open at any given time
- 90+ manual touches per invoice
- Client-specific ordinance compliance requirements
- Varying insurance carrier invoicing requirements
- Inconsistent assessments of billable services led to high revenue leakage

This was a strong AI candidate because the process involved unstructured text, document review, and ordinance analysis — but still needed deterministic billing logic and exception control.

Manual invoicing flow:



Fire Recovery's AI-Governed Solution



Design Choices that Mattered

- Hard-coded parameters for deterministic decisions
- AI used for summarization, parsing, and ordinance analysis
- Humans handled out-of-bounds cases

Applying to SAP

The point is not that all of SAP should behave like an LLM. The point is that AI can help with language-heavy work, while workflow, rules, and humans still own the process architecture.

Fire Recovery USA's Outcomes

Automation Rate

70%

Processing Speed

Days ➔ Seconds

Cycle Time

Weeks ➔ Days

What Worked

- Heavy pre-work before turning on AI
- Selective use of AI for bounded language tasks
- Workflow and rules kept accountability intact

2024 Net Cost Savings

\$248,000+

Lessons to Bring Forward

- Keep clear rule logic deterministic; do not hide it in the LLM
- Turning AI on everywhere is expensive
- Models change quickly, so governance cannot be one-and-done

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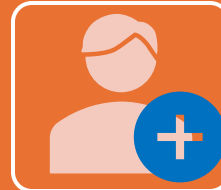


What a Safe First Use-Case Looks Like

Selection Criteria:

- Narrow scope and bounded inputs
- Clear success metric and known failure modes
- Low-to-moderate process risk
- Obvious exception path for uncertain cases
- A measurable cycle-time or effort reduction
- No need to let AI make the final policy decision

Strong Candidate Patterns for SAP-Centered Operations



Vendor or Customer Onboarding

AI extracts and summarizes; rules validate required data and route exceptions



Invoice or Claim Exception Triage

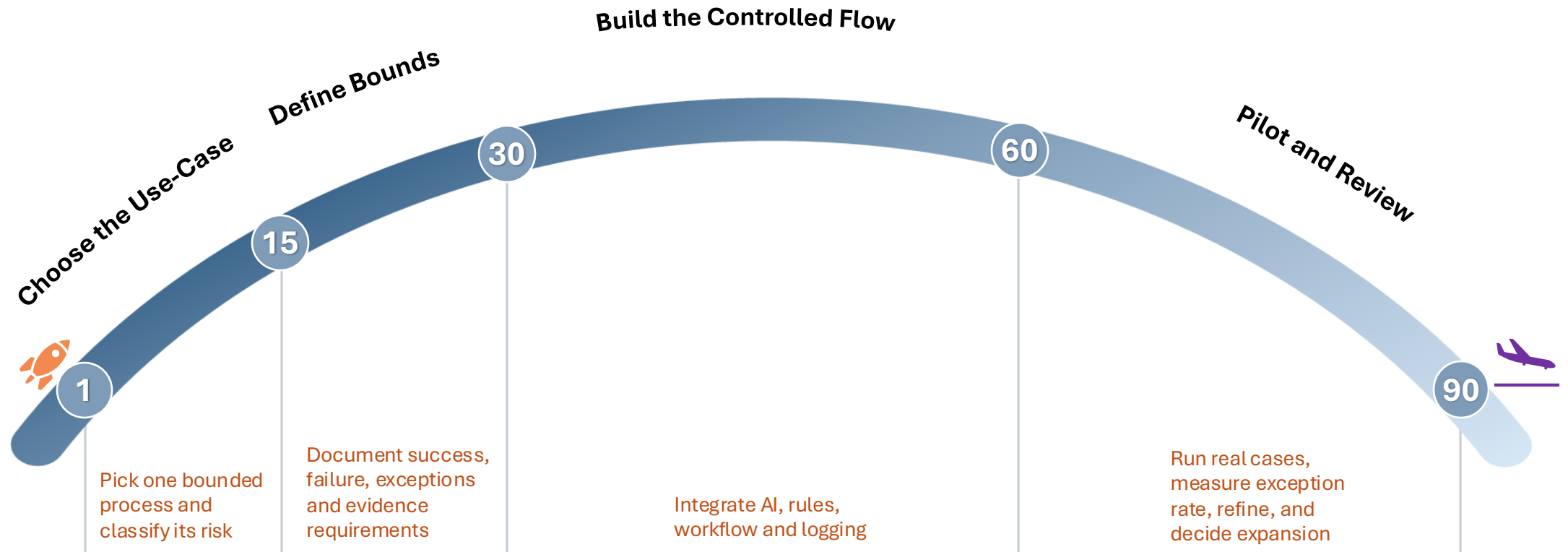
AI narrows the queue; workflow routes anything high-risk or incomplete



Master-Data Updates

AI creates record from unstructured data sources; deterministic checks evaluate validity and determine actual update path

90-Day Path to a Governed Pilot



A good pilot ends with evidence, not just enthusiasm

Questions Every SAP Team should Ask before Go-Live

1	What is the AI allowed to do by itself?	5	What evidence will remain for audit afterward?
2	What remains deterministic and policy-driven?	6	How will changes to prompts, rules, or models be approved?
3	What creates an exception path?	7	How will quality, cost, and drift be monitored over time?
4	What data is the model allowed to use?	8	Who owns the process, the control logic, and the exception queue?



The Fire Recovery pattern answered these questions explicitly: what AI could do, what remained deterministic, when humans intervened, and what evidence remained.

Q&A



Put AI ✨ inside the process.

Do not let it float outside it.



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