

Scaling PMO with Gen AI

October 2024





Topics for Today



PMO JOURNEYS AND KEY ELEMENTS



PMs ARE THE TEAM'S QUARTERBACKS



QUARTERBACKS NEED COACHES TOO



AI FOR PROJECT MANAGERS



Meet Our Players



URVASHI TRIPATHI
Boston



FRANCISCO ALEJO
San Francisco Bay Area



BHAVANA LAKHINA
Mumbai

Client: Manufacturing Company

Project Phase: Planning & Requirement Gathering



Meet Our Players



URVASH TRIPATHI
Boston



FRANCISCO ALEJO
San Francisco Bay Area



BHAVANA LAKHINENA
Mumbai

Client: Health Plan Organization
Project Phase: Mid-Implementation

Meet Our Players



URVASH TRIPATH
Boston



FRANCISCO ALEJO
San Francisco Bay Area



BHAVANA LAKHINA
Mumbai

Client: AI-Product Startup

Project Phase: Prod management and product engineering



URVASH TRIPATHI
Boston

Client

Manufacturing Company

Project Phase

Planning & Requirement Gathering

Situation

Implementing a new ERP system for streamlined operations across departments

Expectations

Ensure system meets departmental needs and integrates smoothly



- Define critical project phases and finalize budget
- Collaborate with finance for resource approval

Budget and Timeline planning



Requirement Setting

- Conduct workshops to gather functional requirements
- Ensure all departments' needs are reflected

- Identify potential blockers
- Develop plans to address identified risks

Risk Assessment



Develop and deploy

- Work with the vendor to configure and customize ERP system
- Validate performance through testing before deployment

- Engage key departments with regular updates to ensure alignment
- Continuously incorporate feedback to refine the project.

Stakeholder Management



Change Management

- Prepare employees for new workflows by implementing training and communication plans
- Monitor and support system adoption to facilitate smooth transition



Francisco Alejo
San Francisco Bay Area

Client

Health Plan Organization

Project Phase

Mid-Implementation

Situation

Implementing a customer service chatbot to improve customer interactions.

Expectations

Ensure chatbot accuracy, relevance, and compliance with financial regulations.



- Provide regular progress updates.
- Address any key challenges transparently.

**Stakeholder
Updates**



**Testing and
Refinement**

- Validate chatbot accuracy and compliance.
- Refine responses based on test results.



**Vendor
Collaboration**

- Adjust chatbot logic based on testing outcomes.
- Ensure CRM integration stays on schedule.

- Train agents to manage chatbot interactions.
- Enable smooth adoption across teams.

**User
Training**



**Data
Management**

- Ensure compliance with data privacy laws.
- Maintain robust data security protocols

- Quickly resolve system bugs and glitches.
- Minimize downtime with fast issue resolution.

**Issue
Resolution**





BHAVANA LAKHINA
Mumbai

Client

Tech Startup

Project Phase

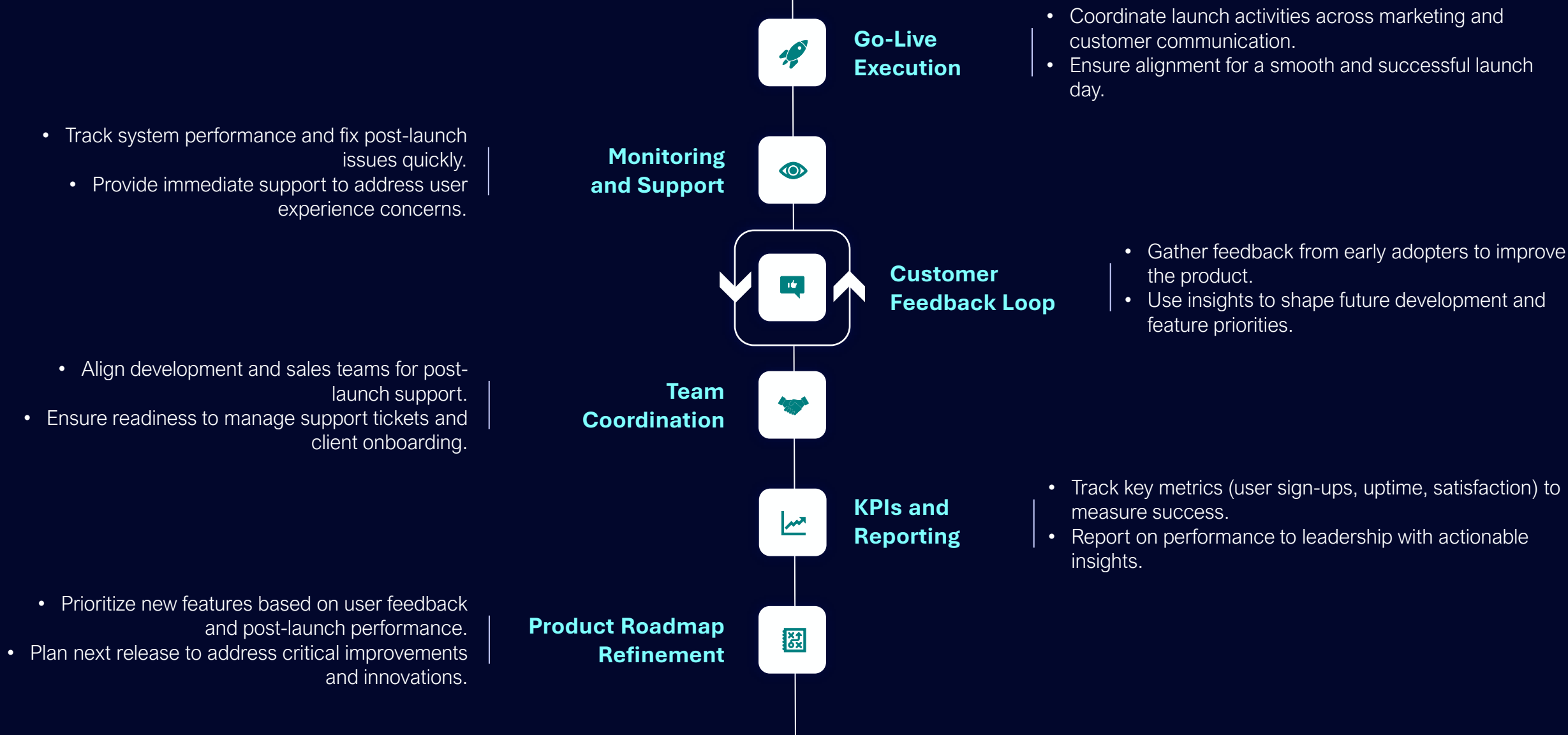
Go-Live & Post-Implementation

Situation

Launching a new AI product for a fast-growing tech company

Expectations

Execute a smooth launch and resolve post-launch issues promptly.





Just as **every pizza, with its unique toppings, has the same core**, every project, no matter how nuanced, is common at its core



Strategic Alignment & Adaptation

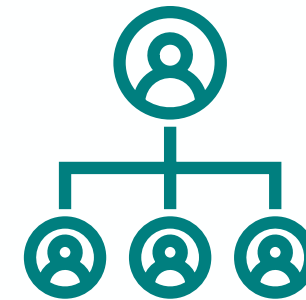
Stakeholder & Communication Management

Quality & Risk Management

Team & Resource Coordination

Project planning and scheduling

Key Elements of Project Management

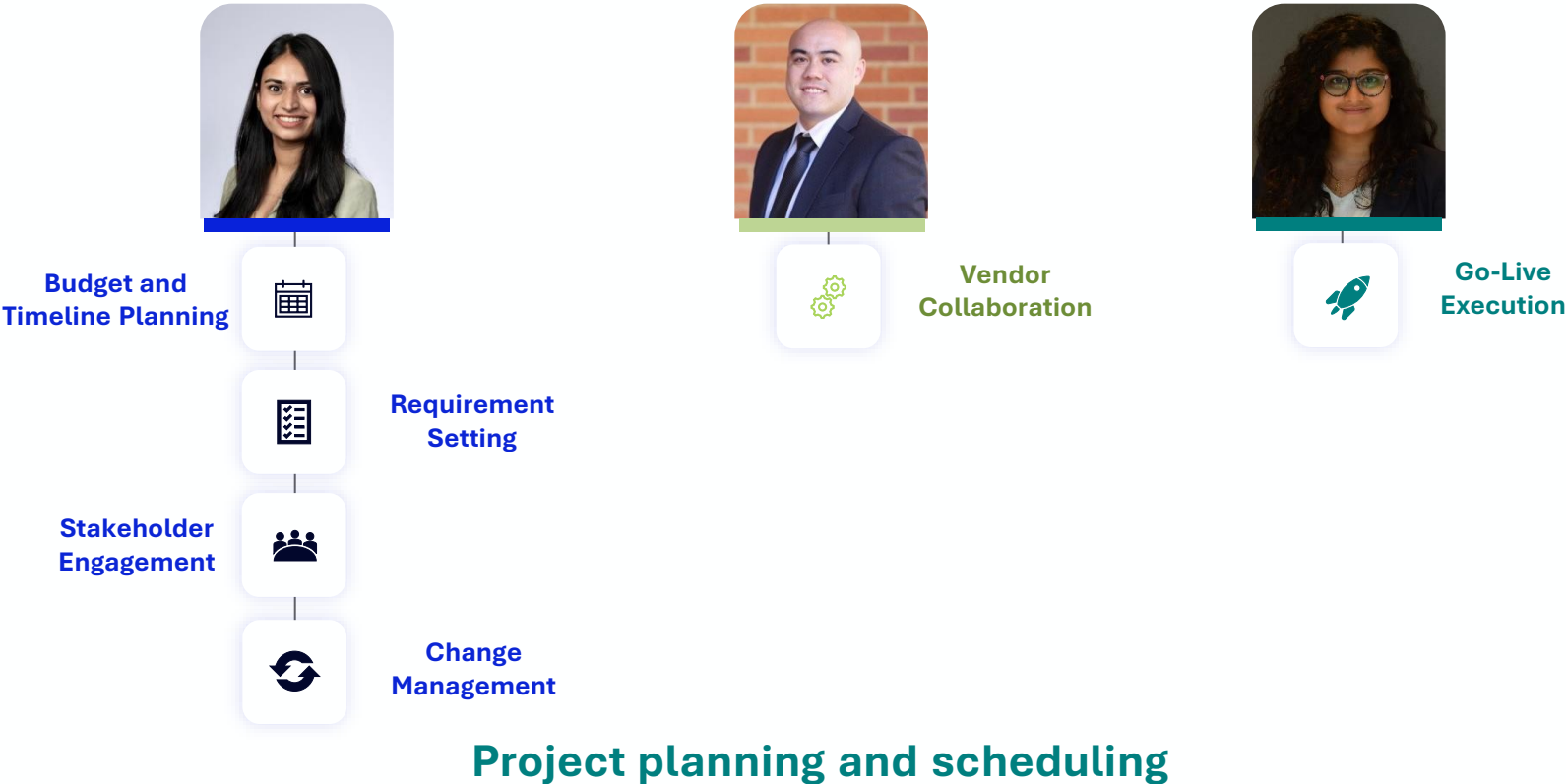


Strategic Alignment & Adaptation

Stakeholder & Communication Management

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Strategic Alignment & Adaptation

Stakeholder & Communication Management

Quality & Risk Management



User
Training



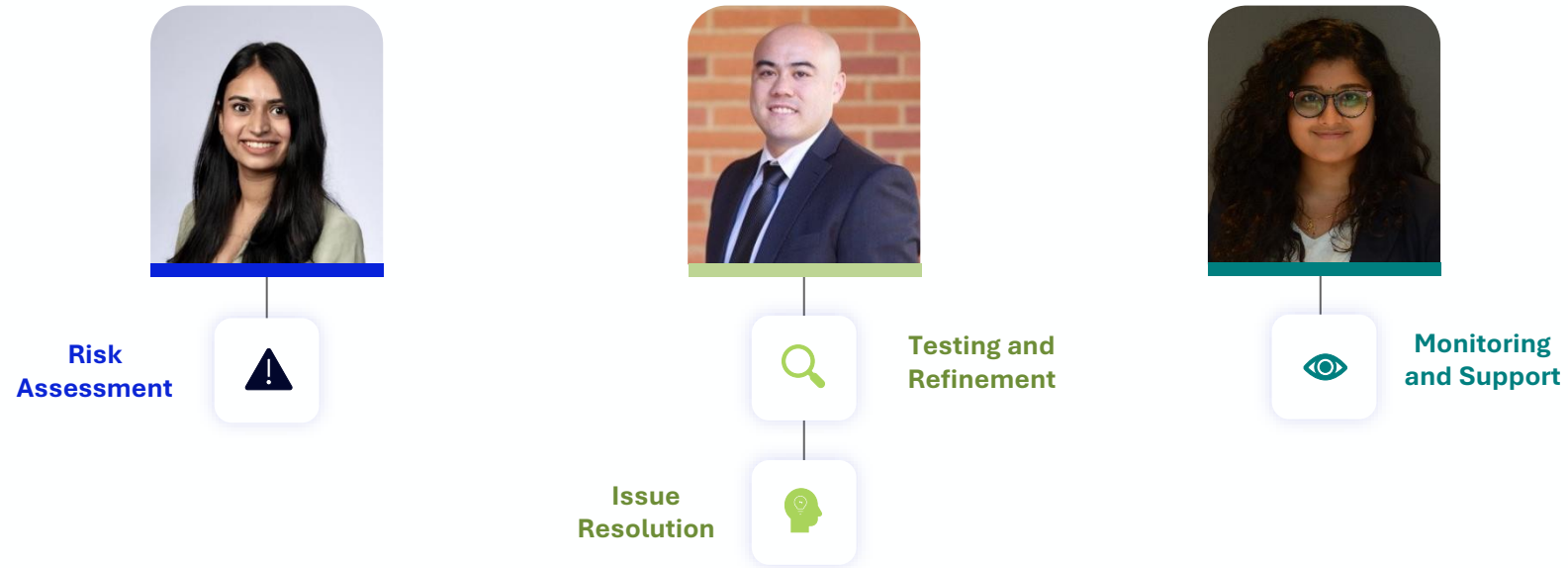
Team
Coordination

Team & Resource Coordination

Project planning and scheduling

Strategic Alignment & Adaptation

Stakeholder & Communication Management



Quality & Risk Management

Team & Resource Coordination

Project planning and scheduling

Strategic Alignment & Adaptation



Stakeholder & Communication Management

Quality & Risk Management

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**Change
Management**



**Data
Management**



KPIs and Reporting



**Product Roadmap
Refinement**



Strategic Alignment & Adaptation

Stakeholder & Communication Management

Quality & Risk Management

Team & Resource Coordination

Project planning and scheduling



PMs at the core of a project's success, they are their teams' quarterbacks (1 of 2)

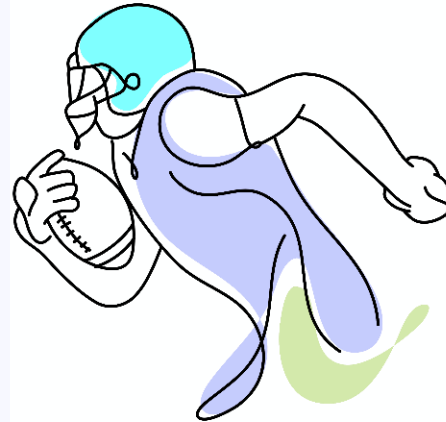
Calling Plays



Project Planning & Scheduling

Setting direction and timelines

Executing Plays



Team & Resource Coordination

Aligning resources for success

Starting Most Plays



Initiating Key Project Phases

Kicking off critical tasks



PMs are the core of a project's success, they are their teams' quarterbacks (2 of 2)

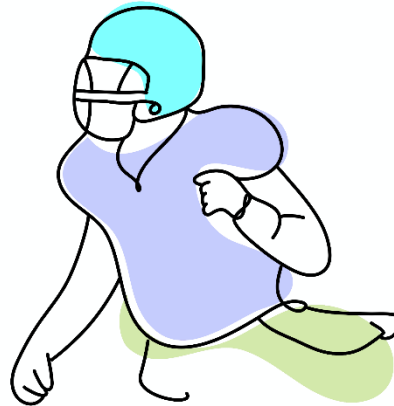
Communicating with Team



Stakeholder & Communication Management

Keeping everyone informed

Observing Défense



Quality & Risk Management

Monitoring risks and quality

Adapting Plays in Real-time



Strategic Alignment & Adaptation

Adjusting to ensure alignment



Thinking like a quarterback





But the playbook to being a quarterback in this domain is extensive, with far too many plays and there is **dire need for a coach**






Project Managers

The Backbone of
Enterprise Success



Resource Allocation



Project Planning



Risk Mitigation and Communication



Reporting and Analytics



Project Managers

The Backbone of Enterprise Success

AI Agents

The Nervous System- guiding with intelligent, data-driven decisions

- AI-driven skill matching
- Real-time availability tracking
- Predictive demand planning

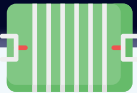


**Intelligent
Resource Allocation**

- Dynamic timeline adjustments
- Automated critical path analysis
- AI-suggested bottleneck solutions



**Adaptive
Project
Planning**



**Dynamic
Risk Mitigation and
Communication**

- Continuous risk assessment
- Automated early warning system
- AI-generated mitigation strategies



**Automated
Reporting and
Analytics**

- Real-time KPI dashboards
- AI-generated executive summaries
- Predictive outcome analytics



AI assists for PMs

Real-world examples



PM assist: Insights and documentation



Input

- Meeting recordings and transcripts
- Reference Documents - Scope, Assumptions



Output

- Requirements<>business need alignment
- Action items, owners and next steps
- Lineage across documentation, user stories and defects

The Result

Improved documentation quality, clear project traceability, reduced rework and hours saved



PM assist: Benefits for PMs



Saves hours of manual cross-referencing



Catches inconsistencies human reviewers might miss



Ensures all sections are **mutually consistent**

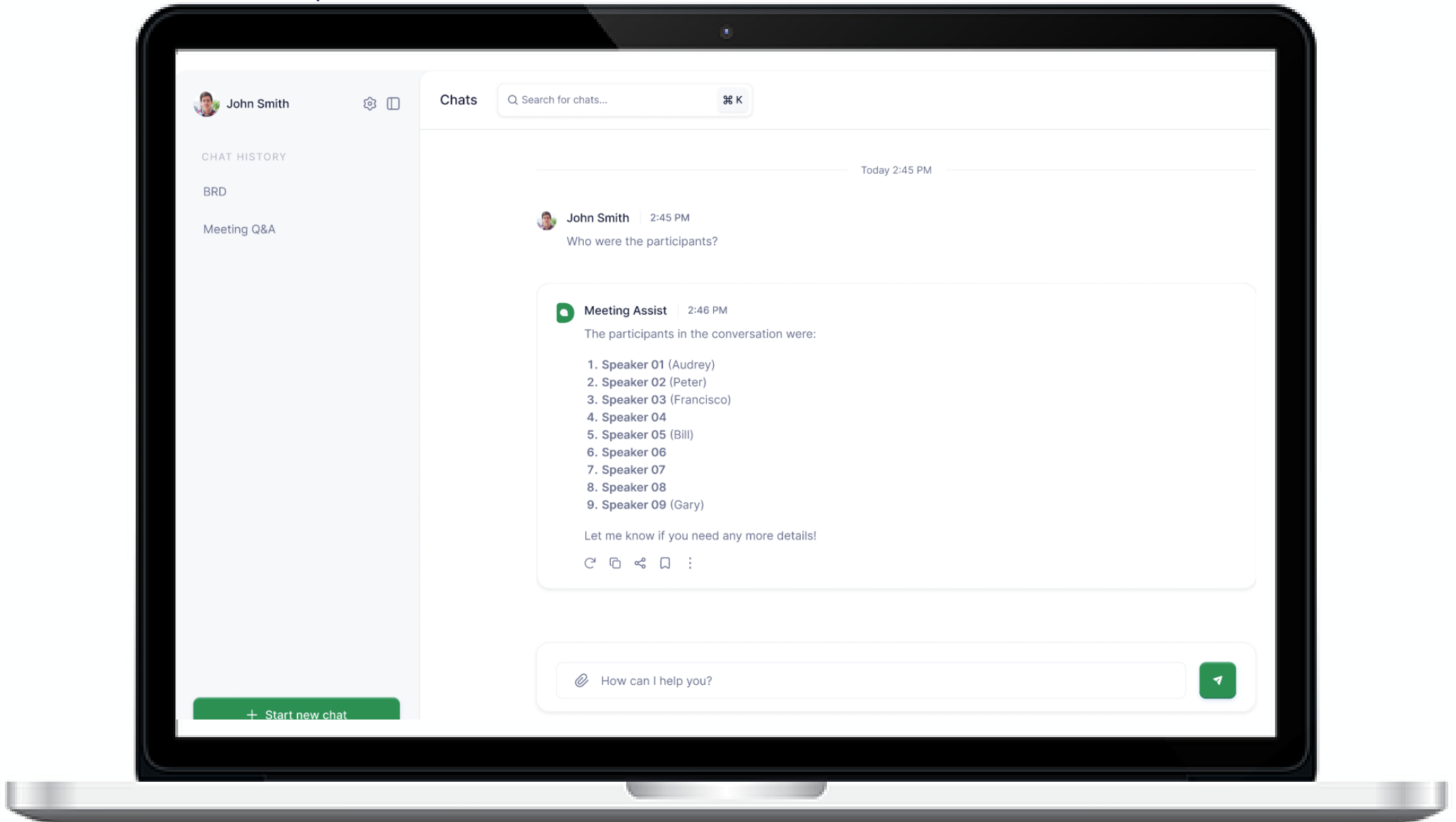


Allows PMs to **focus on strategic aspects of the project**



PM assist: Experience flow

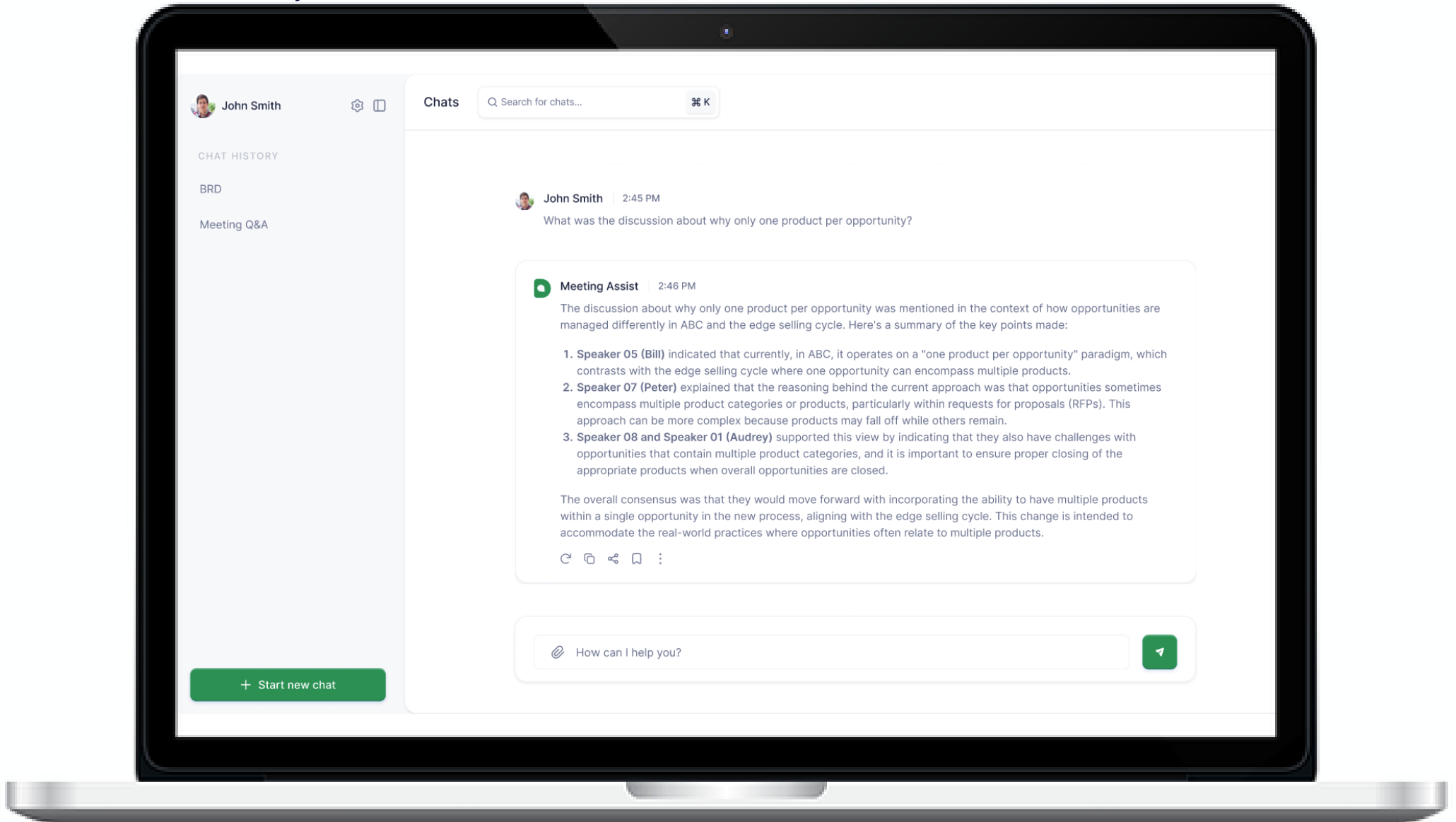
Conversational interaction and questions





PM assist: Experience flow

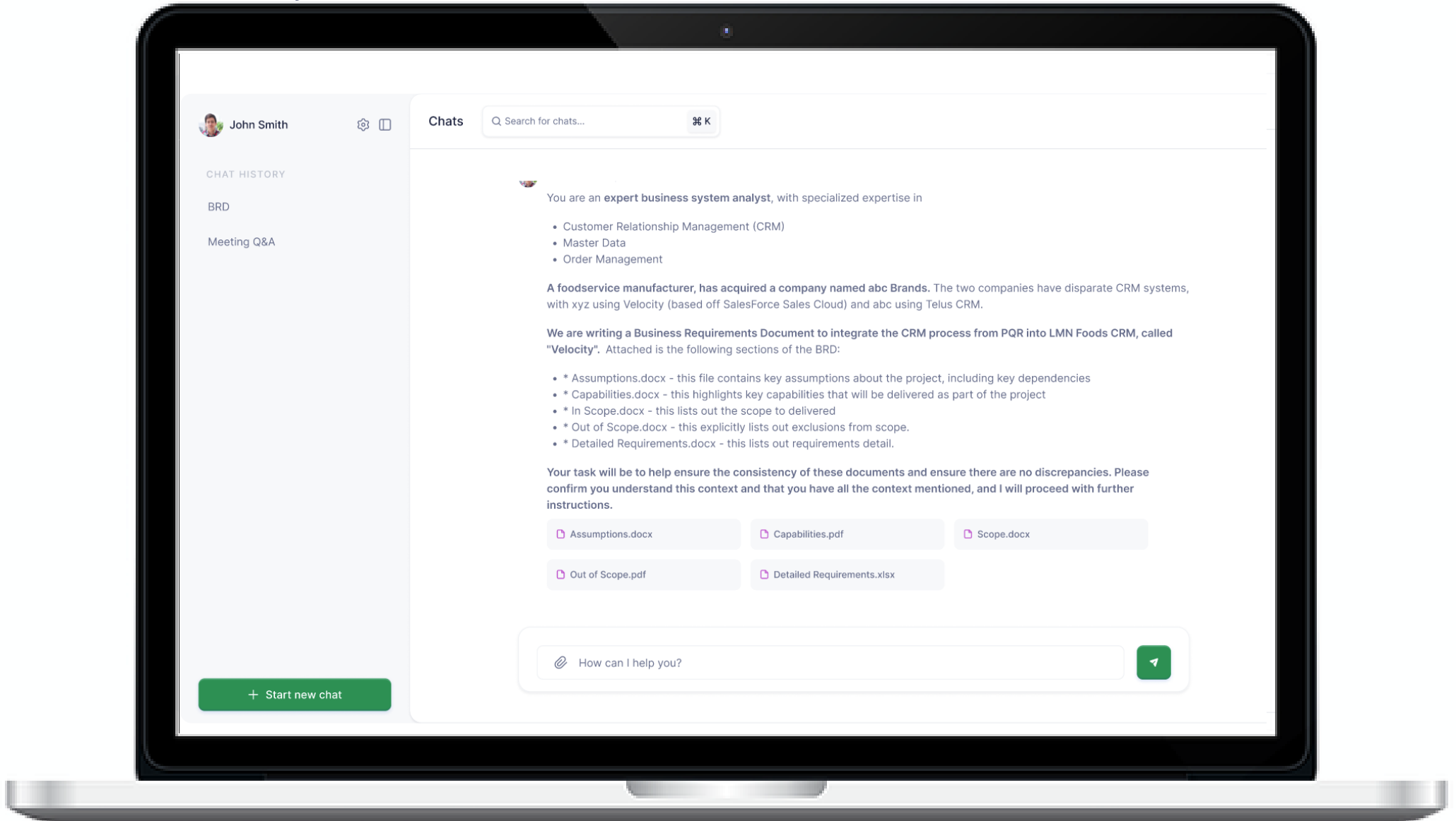
Summarization across a variety of source documents





PM assist: Experience flow

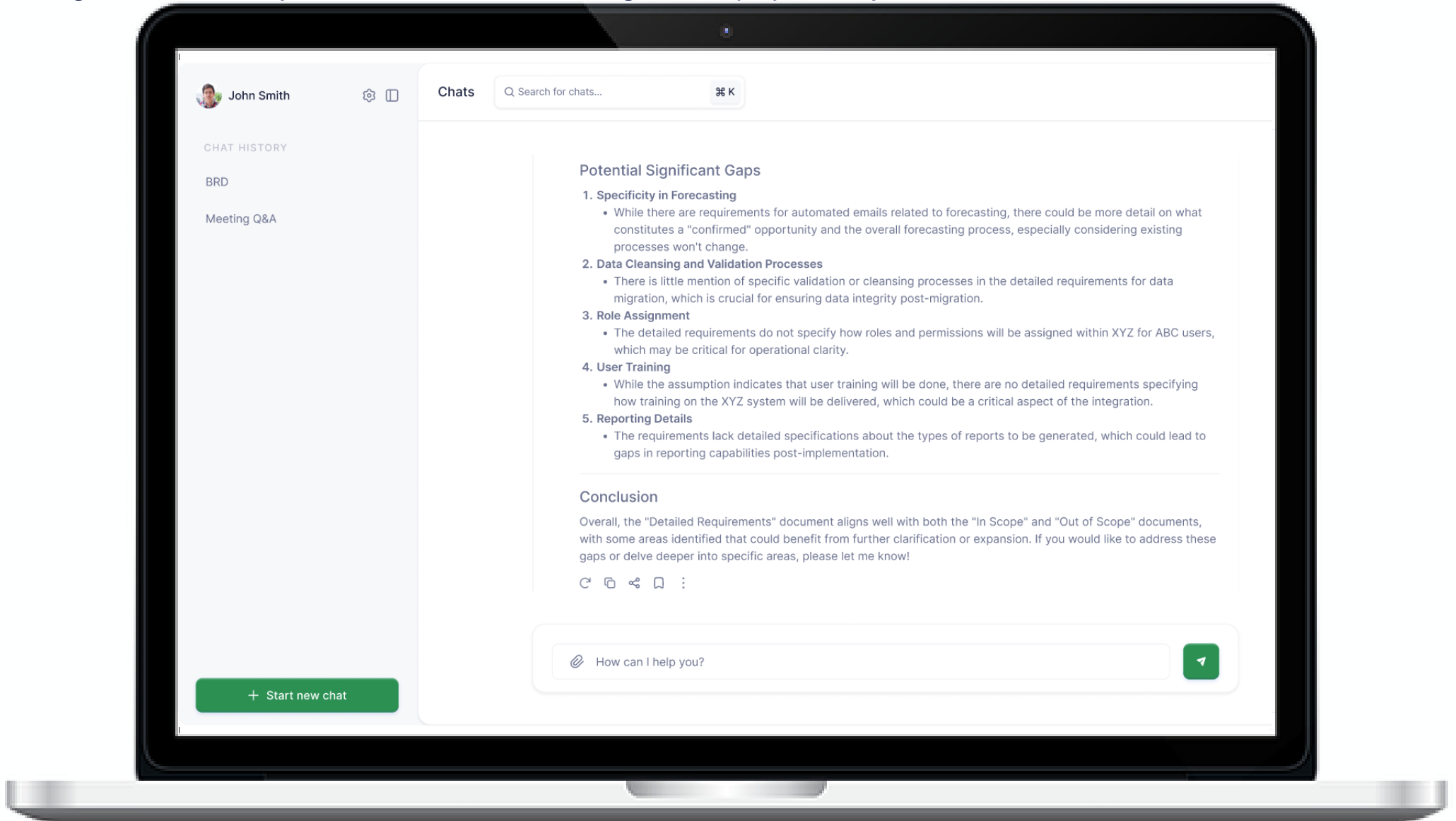
Summarization across a variety of source documents





PM assist: Experience flow

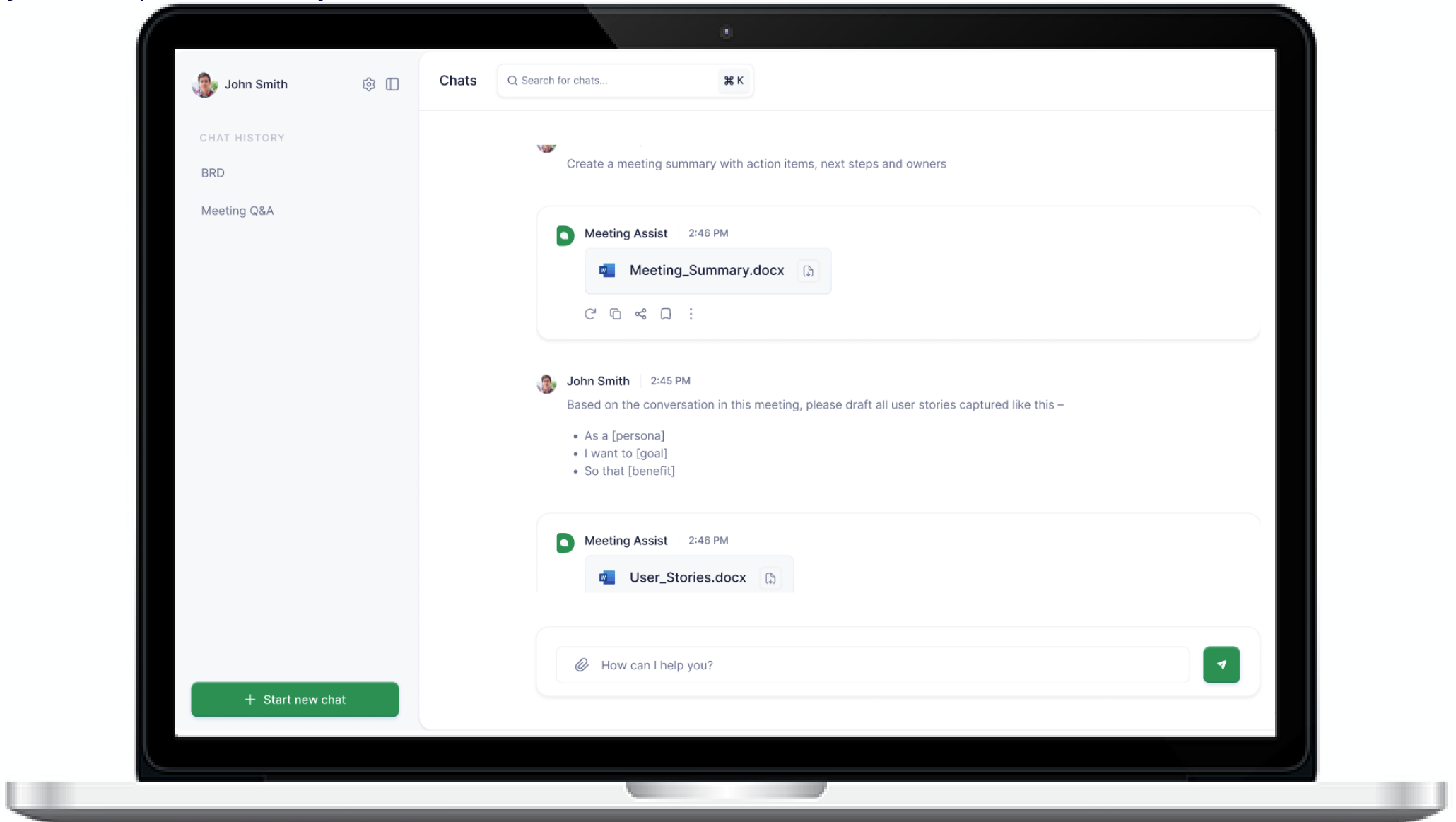
Clear lineage and consistency across documentation throughout the project lifecycle





PM assist: Experience flow

Ready to use outputs in formats you decide



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Thank you