



Key Questions to Implement Generative AI in Project Management

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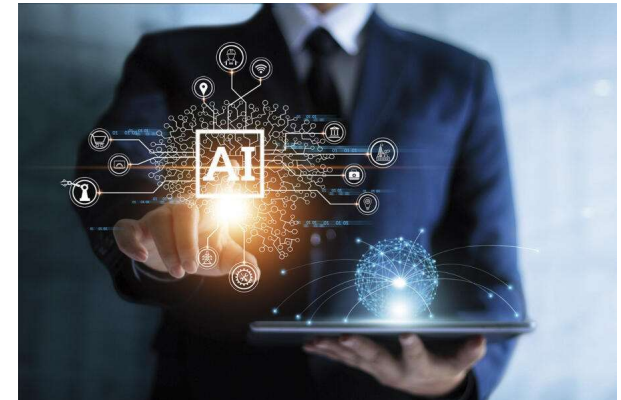
Agenda

Section	Topics
1	Introduction / Expectation Setting
2	About Generative AI
3	Key Questions to Implement Generative AI
3	Game Plan for Implementing Generative AI
4	Quiz
5	Conclusion, Q&A

Objectives

By attending this webinar, you will learn:

1. The answers to key AI related questions.
2. The knowledge to begin building your own AI game plan.



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Helping organizations achieve excellence in delivering business outcomes within 8-12 weeks through Agile Coaching



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CEO/Enterprise Agile Coach @ RefineM since Dec 2011

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25+ years of successful Agile & Project leadership before Launching RefineM

- ✓ Successfully led hundreds of projects of all sizes using Waterfall and/or Agile
- ✓ Recovered many projects, saved millions of dollars
- ✓ Implemented numerous process improvements
- ✓ Coached/mentored hundreds of PMs and executives
- ✓ Board member of SWMO PMI Chapter (2008-2014)

Born in Meerut, a small town in north India. Now lives in Cary, NC with wife and kids

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RefineM's GenAI Initiatives

RefineM is established as a leader in the Generative AI space.

- Our 2-day Generative AI course
- Our AI POC group
- Our AI tools, Intellidoc.AI and DBQuery.AI



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What's New at RefineM

Upcoming Free Webinar	Date
<i>Is Agile Dead?</i> https://refinem.com/refinem-july-2025-webinar-is-agile-dead/	July 17

RefineM Products	Self-Paced Online Training
<u>Essential Gear for Project Managers</u> RefineM.com/products/	<u>Agile Fundamentals Self-Paced Course</u> RefineM.com/course/agile
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<u>Agility Assessment</u> Agility.RefineM.com	<u>Agile BusReqs Self-Paced Course</u> https://vimeo.com/ondemand/refinembusreq
<u>PDU Bundle</u> https://vimeo.com/ondemand/refinempdus	<u>Backlog Grooming Self-Paced Course</u> Udemy.com/course/backlog-grooming-for-agile-requirements/

Survey Question

What are your expectations for this webinar?
Why are you here today?



Use the chat to answer

Survey Question

How comfortable are you with AI on a scale of 1-10?



Use chat to answer



About Generative AI

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AI - What is it?

Artificial Intelligence (AI): The simulation of human intelligence in machines that can perform tasks, learn from experiences, and adapt to new situations

Generative AI: A type of artificial intelligence that results in new data, such as images, music, text, or code

GenAI works by learning patterns from data and using them to create new content. In other words, GenAI uses AI to create new content.

Here are some examples of the differences between AI and GenAI:

Artificial Intelligence	Generative AI
Voice assistants (Siri, Alexa)	Chatbots like ChatGPT
Fraud detection systems	Image generators (DALL·E, Midjourney)
Recommendation algorithms (Netflix, Spotify)	AI music composers



Key Questions to Implement Generative AI

1. How can Generative AI tools support what we're doing right now?
2. How can we ensure our data is secure?
3. How can we ensure our use of Generative AI is ethical?
4. How can we train our project managers and PMO staff to prepare?
5. How do we measure the success of the Generative AI tool deployment?
6. How do we maintain human oversight and accountability?
7. What tools can we use to get started?

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1. How can Generative AI Tools Support What We're Doing Right Now?

PM Tasks Suited for GenAI	PM Tasks Not Suitable for GenAI
Drafting meeting agendas	Approving budget reallocations
Writing status update templates	Negotiating contract terms
Summarizing meeting notes	Resolving interpersonal team conflicts
Creating risk register drafts with high-level risks	Making final go/no-go decisions
Generating emails to stakeholders	Interpreting legal or compliance policies
Brainstorming	Conducting performance evaluations
Drafting project charters	Managing vendor escalations
Creating outlines for WBS	Leading crisis management decisions
Generating user story templates	Adapting strategy based on culture
Simulating basic project scenarios	Finalizing strategic planning initiatives

2. How can we ensure our data is secure?

- Do NOT share sensitive or proprietary data with external tools
- Make data anonymous where possible
- Check compliance with industry regulations (e.g., HIPAA, GDPR, ISO 27001)
- Set internal governance rules for what kinds of data can be processed with GenAI



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3. How can we ensure ethical use of Generative AI?

- Use GenAI as a co-pilot, not an autonomous decision-maker
- Establish review and approval steps before publishing GenAI-generated content
- Train users to check for bias, hallucinations, or inconsistencies
- Align prompts and use cases with organizational values and project objectives



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4. How can we train our project managers and PMO staff to prepare?

- Develop training programs that cover technical skills and best practices.
- Position these tools as productivity enhancers rather than replacements.
- Create pilot programs with early adopters who can become internal champions.
- Ensure data analysis, AI tool operation, and critical evaluation of AI outputs are covered.



Continuous learning and adaptation to new AI technologies are crucial for staying current and maximizing AI benefits.

5. How do we measure the success of the Generative AI tool deployment?

Track:

- ✓ Time saved on documentation or planning
- ✓ Increase in throughput or update frequency
- ✓ Reduction in administrative workload
- ✓ User satisfaction with AI-assisted outputs
- ✓ Accuracy or quality of GenAI suggestions (via peer review)



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6. How do we maintain human oversight and accountability?

- Implement human review.
- Establish clear accountability structures.
- Create mechanisms for human intervention.
- Maintain transparency about AI involvement in project deliverables and communications.



7. What tools can we use to get started?

Use Case	Tool	What It Does
Idea Generation & Brainstorming	ChatGPT, PMI Infinity	Generate project names, brainstorm risks, user stories, and improvement ideas. Drafts charters, RFPs, and requirements documents based on prompts.
Writing & Communication	GrammarlyGO / Jasper	Drafts emails, status updates, and reports in your tone and style.
Meeting Summaries & Notes	Fireflies.ai / Otter.ai	Transcribes and summarizes meetings, identifies action items.
Data Analysis & Reporting	Microsoft Copilot (Excel/PowerPoint)	Automates analysis, charts, and reports directly from data.
Project Planning & Scheduling	Notion AI / ClickUp AI	Generates draft timelines, task lists, and helps structure your project plans.
Training & Learning	EdApp AI / ChatGPT	Creates training modules, quizzes, and learning materials quickly.
AI-Assisted Code Generation (for Tech PMs)	GitHub Copilot	Assists with generating scripts, automations, or basic tools for project use.



Game Plan to Implement Generative AI

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Game Plan for Implementing Generative AI

Phase 1: Foundation and Assessment

Phase 2: Pilot

Phase 3: Scale and Optimize

Set up Success Criteria and Risk Management to support ongoing solution

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Quiz

Go to [menti.com](https://www.menti.com) to answer



Top 2 Winners get free access (100% discount) to one of RefineM's products of their choice

1. Essential Gear for Project Managers (\$89)
2. PMP Exam Prep Simulator – 3 months (\$100)
3. Agility Assessment – 3 months (\$99)
4. PDU Bundle - 2 months (\$98)
5. Self-Paced Online Course (\$100 each)
 - Agile Fundamentals, or
 - Project Management Fundamentals

Conclusion



Think about what you're currently doing and how Generative AI can support it.



Consider what your PMO and project team need to effectively utilize Generative AI tools.



Ensure you are integrating data security and ethical practices into your Generative AI use.
Make sure there is a human in the loop to oversee your AI implementation.

RefineM's 2-Day AI Tools Workshop

About 70-75% of this 2-day training course is hands-on exercises based on case studies and refined through real-world applications of AI tools. Be prepared to get your hands dirty and discover ways that AI can be a part of your project management toolkit.

Next class is Thursday-Friday, July 18-19.

Also available August 15-16, September 19-20, and more.

https://trainings.refinem.com/index.php/Home/genai_course_schedule
for more information and to register



RefineM July Webinar: Is Agile Dead?

Is Agile truly “dead”?

Or it is evolving into a new shape/form?

Why ScrumMasters and Agile Coaches are struggling?

Join us on July 17 for a discussion of Agile’s current state and its future.



<https://refinem.com/refinem-july-2025-webinar-is-agile-dead/> for more information and to register

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PDU Claim Code	3990NYDD3T
Activity Name	<i>“Key Questions to Implement GenAI in Project Management”</i>
Provider	“RefineM LLC”
Date Started/Completed	June 26, 2025
Contact Person	NK Shrivastava
Contact Phone	(417) 763-6762
Contact Email	Trainings@RefineM.com
PDU s	1.00 Ways of Working.

**Please claim your PDU by end of September 2025.
Claim code will expire after September 30.**

Questions

Questions?

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