

AI in Action

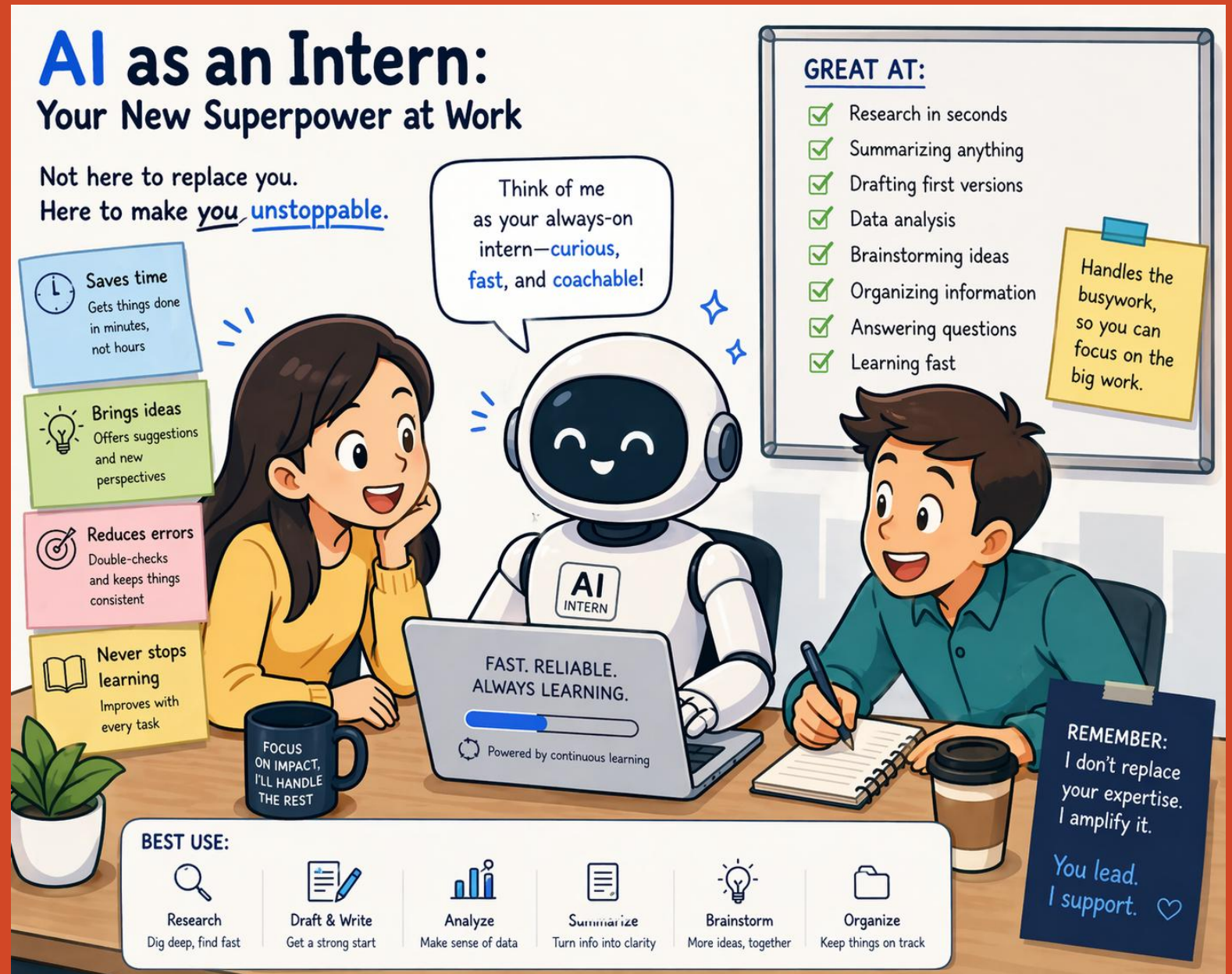
Tools, Techniques , Tactics
for Stronger Outcomes in
the Modern Workplace.

Angela Weller

515-770-5812

anzela998@gmail.com

[Linkedin: anzela998](#)



Value of AI

- ✓ Fast research
- ✓ Quick summaries
- ✓ First drafts
- ✓ Brainstorming
- ✓ Organizing info
- ✓ Data analysis
- ✓ Pattern spotting
- ✓ Rewriting content
- ✓ Repetitive tasks
- ✓ Following instructions
- ✓ Speeding up workflows
- ✓ Supporting your thinking



Change is Progress = More Efficient & More \$\$\$



Human + AI: improve speed and quality.

14% productivity lift

Customer-support agents using generative AI improved productivity by about 14% on average, with the largest gains going to newer and lower-skilled workers.

37% faster completion

In an MIT study of mid-level professional writing tasks, people using ChatGPT completed the work substantially faster and with higher-quality output.

25% faster, 40% higher quality

In a Harvard/BCG study, consultants using AI completed suitable tasks faster and produced significantly higher-quality results.

AI NOT a substitute for judgment.

It is a multiplier when paired with strong prompts, domain expertise, and verification.

Best-fit uses: research synthesis, first drafts, summarization, pattern spotting, and decision support.

Watch-outs: overreliance, weak prompting, and using AI outside its strength area.

AI = Efficiencies

Research shows professionals **pairing human judgment with AI** = productivity improves by 15% to 40% or more on the right tasks

Biggest gains:

- * When people prompt well
- * Validate outputs
- * Apply their domain expertise



Partnership

- AI is NOT the brain. You are.
- Garbage in, garbage out still applies to AI.
- AI can accelerate thinking, but it cannot replace clear thinking.
- The human leads. AI follows.
- Better prompts produce better outcomes



Core Concept Model

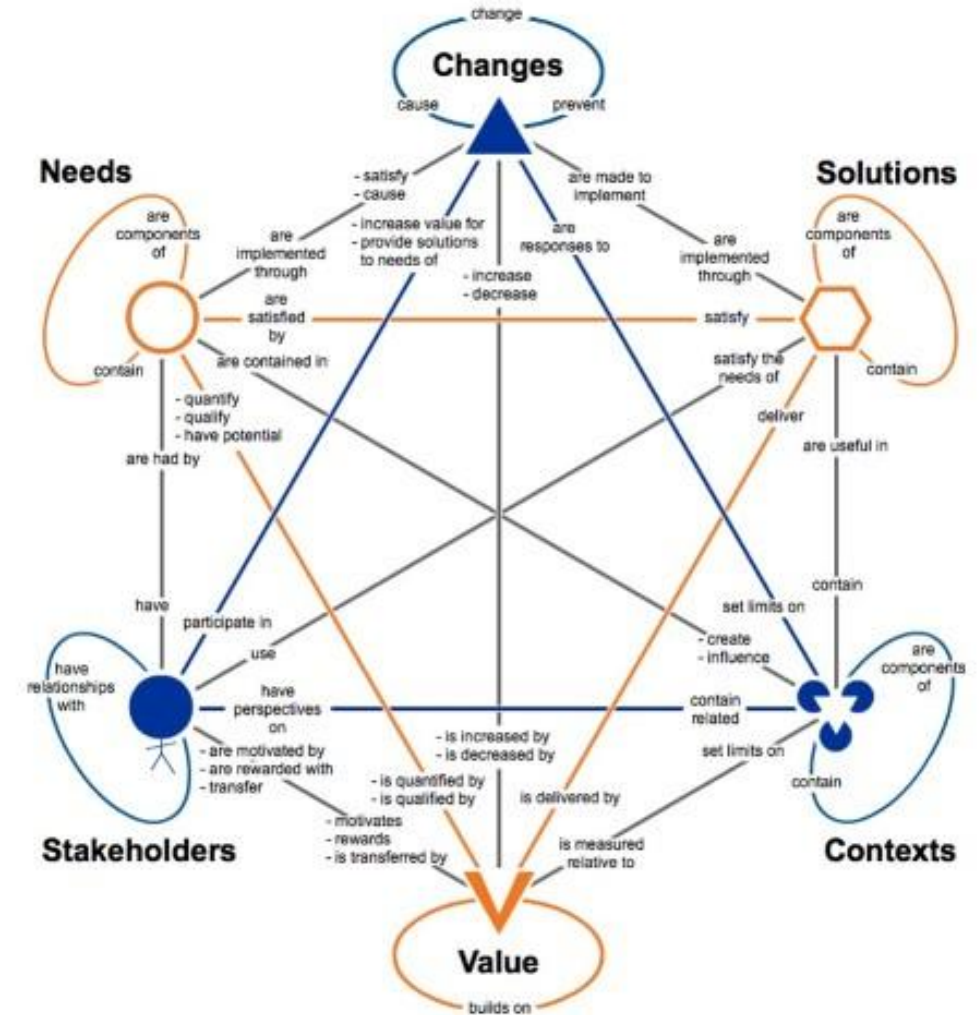
PMI & IIBA Professionals Lifecycle

A Practice Guide – PMBOK® Guide

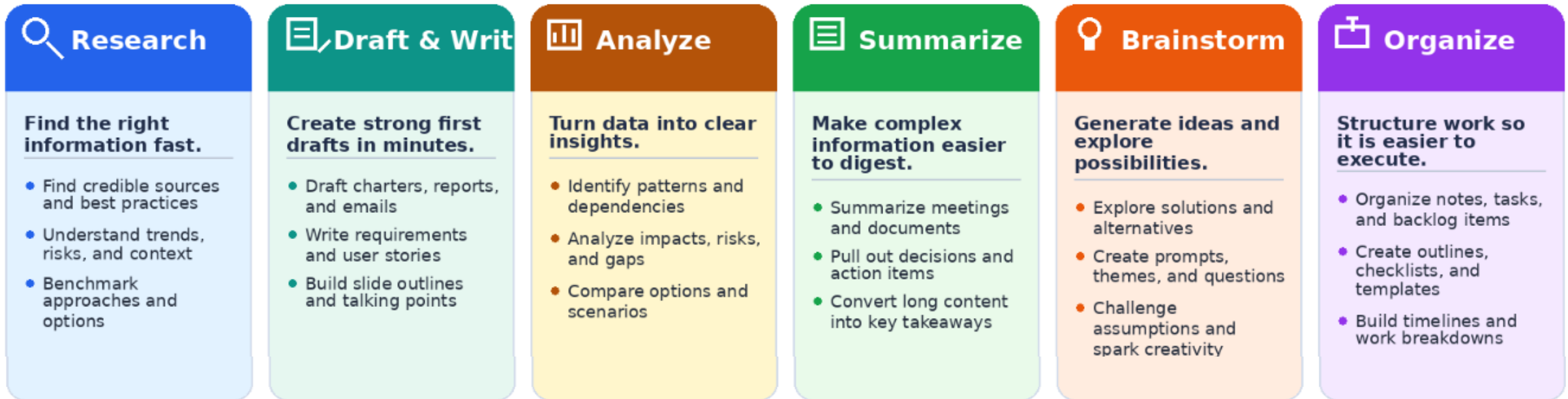
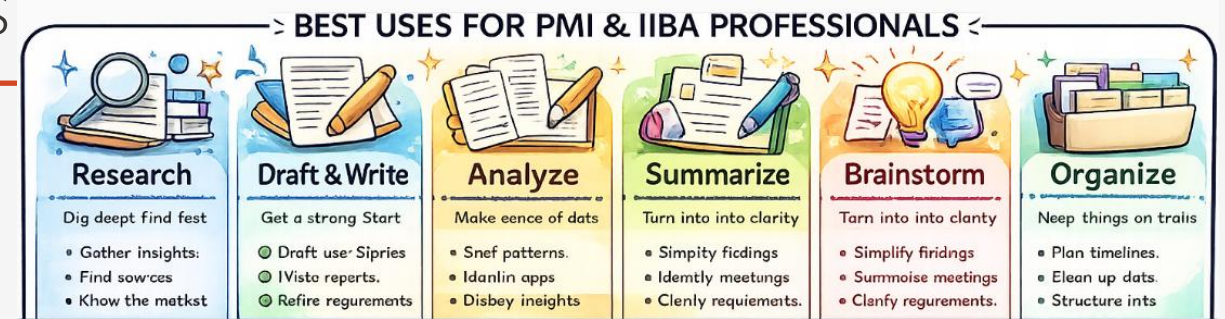
The project management lifecycle consists of five Process Groups. These groups are not project phases.



These Process Groups are iterative and overlap.
They interact throughout the project lifecycle.



AI's Strengths: You lead - AI supports



AI doesn't replace your expertise. It amplifies it. You lead. AI supports.

Tip: use AI for speed and structure, then review for accuracy, context, and tone.

CAUTION: AI Does Hallucinate

Always Validate



Your best prompts do 2 things:

- tell it exactly what to make/do
- tell it exactly what NOT to do

If it does not know – It will improvise.

Your strongest line to reuse is:

- **“Be accurate, do not guess, state assumptions clearly, and do not present uncertain information as fact.”**

For research add
“Provide your source”

Treat AI like this:

- good at speed
- good at structure
- good at drafts
- Not automatically good at truth

MoSCoW Prompts

Must Have:

Objective, task, context, facts, audience, format, constraints

Should Have:

Tone, scope, background, success criteria, gaps, assumptions

Could Have:

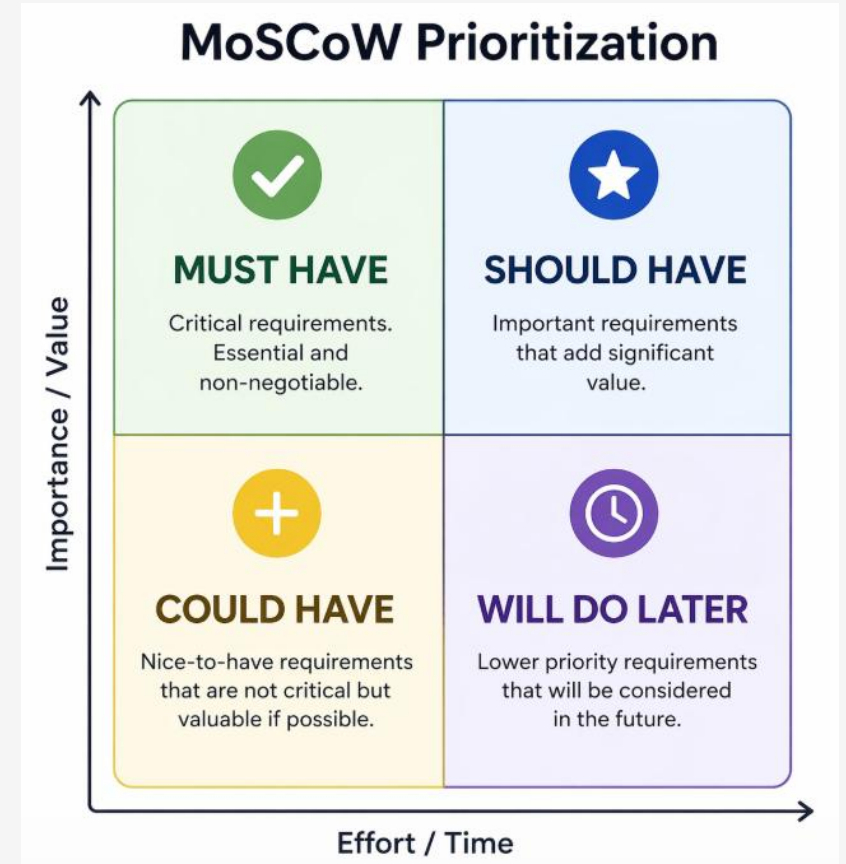
Examples, steps, structure, length, priorities, options

Won't Have:

Vagueness, no context, no facts, broad asks, blind trust

A weak prompt asks AI to create the story.

A strong prompt gives AI the business context, user, goal, value, rules, and guardrails needed to draft a story the team can actually refine and build.



Tip: Prompts

Good prompts give AI clarity, context, direction, boundaries, and facts.

Prompt must tell AI:

- What you need
- Why it matters
- Who it is for
- What information to use
- What the answer should look like
- What limits to follow

Prompt should also tell AI:

- What good looks like
- What to avoid
- What assumptions to flag
- What gaps to identify
- Strong one-liner for your presentation
- A strong prompt is clear, grounded, structured, and focused.
- Speaker line

“Just like a strong requirement, a strong AI prompt needs clarity, context, scope, and quality inputs. If those pieces are weak, the output will be weak too.”

Power of a Good Prompt

- A clear goal
- A specific task
- Business context
- Relevant background information
- The intended audience
- The desired format
- Boundaries or constraints
- Real source material or facts
- The tone or style you want
- Examples, when helpful
- Any assumptions that should be avoided
- What success looks like
- A request to stay grounded in the information provided
- A request to identify gaps or missing information
- Human review at the end

Good prompts give AI clarity, context, direction, boundaries, and facts.

Bad Prompt = Topic - Vague

Good Prompt = Job - Clear



Bad Prompt

“Write me something about AI for work.”

Why it is bad

- Too vague
- No clear goal
- No audience defined
- No format requested
- No business context
- No boundaries
- No facts to work from

What happens

- AI will likely give a very generic answer because it has no direction. The output may sound polished, but it will not be tailored, focused, or especially useful.

Good Prompt

“Create a one-slide summary for PMI and IIBA conference attendees explaining how AI can improve workplace efficiency. Focus on practical uses for business analysts and project professionals. Keep the tone professional and easy to understand. Include 5 bullet points and 1 closing message. Do not use technical jargon.”

Why it is good

- Clear objective: create a one-slide summary
- Audience defined: PMI and IIBA conference attendees
- Context provided: workplace efficiency
- Focus area identified: business analysts and project professionals
- Format defined: one slide, 5 bullet points, 1 closing message
- Tone defined: professional and easy to understand
- Constraint added: no technical jargon

What happens

- AI has enough direction to give a focused, relevant, and presentation-ready response.

AI Prompts = MORE IS MORE

Analyst Professional Should Use

- 1. Clarify the problem**
What is the real business need?
- 2. Convert notes into requirements**
Turn messy input into structured requirements.
- 3. Create user stories**
Build stories with acceptance criteria.
- 4. Find gaps and risks**
Identify missing details, assumptions, and conflicts.
- 5. Prepare for workshops**
Build agendas, questions, and discovery topics.

Key reminder:

AI can draft and organize, but the BA validates.

Product Owner Should Use

- 1. Clarify product vision**
Define the product goal, users, value, and success measures.
- 2. Prioritize the roadmap**
Compare features by value, effort, risk, urgency, and dependencies.
- 3. Break down big ideas**
Turn epics into features, user stories, and acceptance criteria.
- 4. Identify tradeoffs**
Show what we gain, lose, delay, or risk with each decision.
- 5. Prepare roadmap communication**
Create executive updates, stakeholder talking points, and release summaries.

Key reminder:

AI can help organize the roadmap, but the Product Owner owns priority, value, and decision-making.

Project Management Professional Should Use

- 1. Build the project plan**
Create scope, milestones, timeline, and key deliverables.
- 2. Identify risks early**
Find project risks, impacts, owners, and mitigation plans.
- 3. Strengthen stakeholder communication**
Create updates, talking points, and decision summaries.
- 4. Track scope and change**
Review change requests, impacts, tradeoffs, and approvals.
- 5. Prepare for governance**
Build status reports, RAID logs, steering updates, and action items.

Key reminder:

AI can help organize, summarize, and pressure-test the work, but the project professional still owns judgment, leadership, and accountability.

Best Uses of AI for PMI Professionals

AI is especially helpful for:

- status reporting
- meeting summaries
- RAID support
- communication drafting
- planning outlines
- stakeholder messaging
- decision framing
- lessons learned summaries
- issue escalation wording
- presentation structure

What AI Should NOT Do Alone

Do **NOT** rely on AI alone for:

- final project decisions
- factual status reporting without review
- schedule commitments
- budget numbers
- governance approvals
- risk acceptance decisions

AI is your **assistant**, not your accountable delivery lead.

Instead of saying: **“Write me a status report.”**

Say: **“Act as a program manager. Write a 1-paragraph weekly status report for executives on a technology implementation. Include progress, top risk, mitigation, and needed decision. Keep it concise, credible, and non-technical.”**

Best Line to Reuse: **Be accurate, do not guess, state assumptions clearly, and do not present uncertain information as fact.**

Prompt Tips Project Managers



Instead of saying:

“Write me a status report.”

Why it is weak:

It lacks role, audience, structure, and clear expectations—resulting in generic, unfocused output that isn’t actionable or executive-ready.

- Say:
“Act as a program manager. Write a 1-paragraph weekly status report for executives on a technology implementation.

Include audience, progress, top risk, mitigation, and needed decision. Keep it concise, credible, and non-technical and action-oriented.”

Instead of saying:

“Create a project update.”

- Say:
“Act as a senior project manager. Using the project details below, create an executive-ready status report, RAID log, steering update, and action item tracker.

Include scope, schedule, budget, milestones, risks, issues, dependencies, decisions needed, owners, due dates, and next steps. Keep it concise, professional, and action-oriented.”

Best Uses of AI for Business Analyst Professionals



AI is especially helpful for:

- Summarizing data
- Identifying patterns
- Organizing inputs
- Find Gaps
- Compare states (Current vs Future)
- Refine Requirements
- Analyze Feedback
- Prioritize Work
- Generate Questions
- Communicate insights
- Define data/reporting
- Create test scenarios (If/Then or Gherkin)

Instead of saying: *“Write me a user story for a new report.”*

Say: *“Act as an Agile Business Analyst/Product Owner. Create a user story for a Salesforce report that helps Sales Managers identify open opportunities with no completed activity in the last 14 days.”*

Include the user story, acceptance criteria, Gherkin scenarios, assumptions, open questions, edge cases, and testing considerations. Do not invent missing facts; list gaps as questions.”
Be accurate, do not guess, state assumptions clearly, and do not present uncertain information as fact.

Do **NOT** rely on AI alone for:

- Discovery cannot be replaced
- Do not trust assumptions blindly
- Documentation must be fact-checked
- Compliance requires expert review
- Customer needs must be validated
- Discovery cannot be replaced
- Do not trust assumptions blindly
- Documentation must be fact-checked
- Compliance requires expert review
- Customer needs must be validated
- Feasibility requires delivery team input
- Data logic must be confirmed
- Security requires governance
- Testing needs business confirmation
- Meeting outputs must be confirmed
- Critical thinking is required
- Sensitive communication needs approval
- Confidence $\neq$ accuracy
- Protect sensitive data
- Watch for bias and gaps
- Alignment is still required

Prompt Tips Product Owners



Instead of saying: **“Write a feature request.”**

Why it is weak:

It does not explain the user, business problem, value, scope, priority, success measure, or what the delivery team needs to build.

- Say: **Act as a Product Owner. Help me turn the information below into a clear feature request for the delivery team.**

Include:

- Feature name
- Business problem
- Target users
- Desired outcome
- Business value
- High-level scope
- Out of scope
- Assumptions
- Dependencies
- Risks
- Success measures
- Open questions

Use concise bullets and make it clear enough for leadership and delivery teams to understand.

Background: [insert facts, stakeholder notes, pain points, or business request]

- Instead of saying: **“Summarize this data for leadership.”**

- Say: **Act as a strategic Product Owner. Create an executive-ready roadmap summary based on the facts below.**

Format it in concise bullets and include:

- Current state
- Business need
- Recommended roadmap direction
- Priority themes
- Expected business value
- Key tradeoffs
- Risks and dependencies
- Decisions needed from leadership
- Next steps
- Keep the tone clear, professional, and outcome-focused.

Facts and findings: [insert research, discovery notes, stakeholder feedback, metrics, or roadmap items]

Prompt Tips Product Owners



Instead of saying: **“Write a feature request.”**

Why it is weak:

It does not explain the user, business problem, value, scope, priority, success measure, or what the delivery team needs to build.

- Say: **Act as a Product Owner. Help me turn the information below into a clear feature request for the delivery team.**

Include:

- Feature name
- Business problem
- Target users
- Desired outcome
- Business value
- High-level scope
- Out of scope
- Assumptions
- Dependencies
- Risks
- Success measures
- Open questions

Use concise bullets and make it clear enough for leadership and delivery teams to understand.

Background: [insert facts, stakeholder notes, pain points, or business request]

- Instead of saying: **“Summarize this data for leadership.”**

- Say: **Act as a strategic Product Owner. Create an executive-ready roadmap summary based on the facts below.**

Format it in concise bullets and include:

- Current state
- Business need
- Recommended roadmap direction
- Priority themes
- Expected business value
- Key tradeoffs
- Risks and dependencies
- Decisions needed from leadership
- Next steps
- Keep the tone clear, professional, and outcome-focused.

Facts and findings: [insert research, discovery notes, stakeholder feedback, metrics, or roadmap items]

Example of a User Story

- **Subject: Board of Directors Webpage Update**
- URL: <http://www.centraliowaiiba.org/chapter/board-members>
- **USER STORY**
As a CIC IIBA website User
I want to have the 'About Us' Board of Directors page updated
So that there is an email link to each board member.
And display the term date range for each position
- **Issue:** Not able to find emails to contact our IIBA CIC board members very easily.

- **Req Details:**
Title: Director of Volunteerism & Outreach
Name: Angela Weller
Term: 2017 - 2018
Email: volunteerismandoutreach@centraliowaiiba.org

Complete similar details for each board member

- See mockup attachment

➤ ACCEPTANCE CRITERIA

Scenario 1 - Layout

Given a user clicks on our about us tab

When the user views the board members

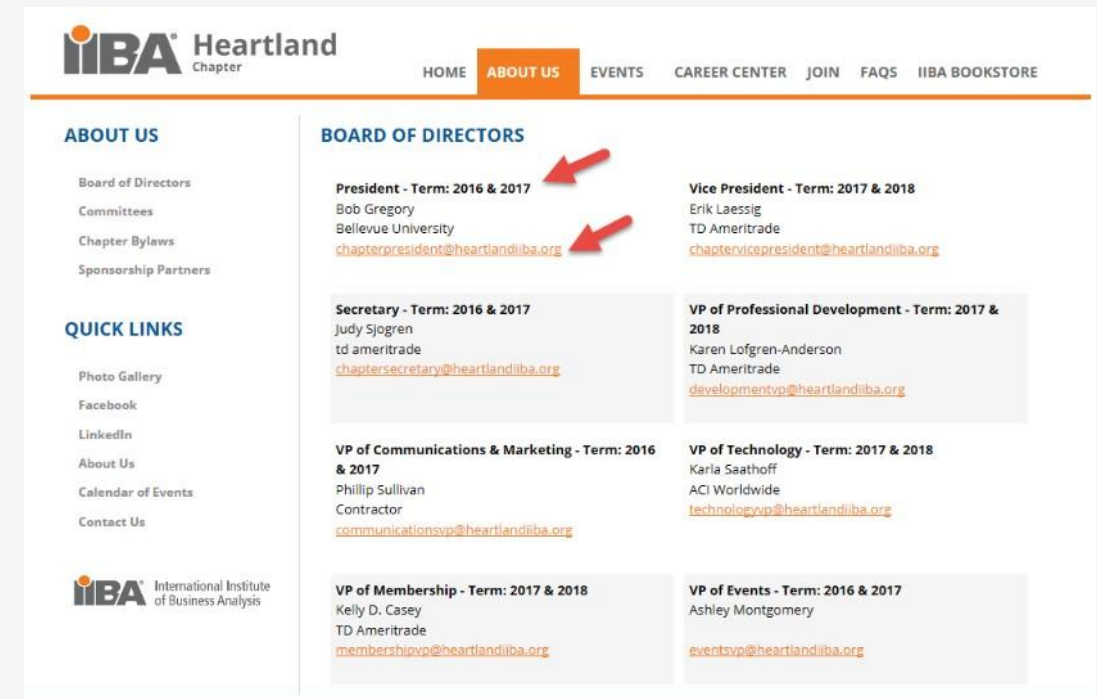
Then user will be able to see all emails & terms

Scenario 2 – Interaction

Given a user clicks on our about us tab

When the user clicks on the email link or any board member

Then email template is created and user can send an email without typing the email.



Best in Class

Category	Best-in-class pick	Why it usually wins	Runner-up(s)	When I would choose the runner-up instead
General assistant	ChatGPT	Best overall breadth: writing, coding, analysis, image generation, agents, and market adoption.	Claude; Gemini; Copilot; Perplexity	Choose Claude for writing-heavy work, Gemini for Google Workspace, Copilot for Microsoft 365, Perplexity for fast cited research.
Coding	GitHub Copilot	Broadest rollout choice for mainstream engineering teams and workflows.	Cursor; Amazon Q Developer; Replit	Choose Cursor for power users, Amazon Q for AWS-heavy teams, Replit for rapid prototypes and browser-native builds.
Design / images	Canva	Best business usability for non-designers and cross-functional teams.	Midjourney; Adobe Firefly; Ideogram	Choose Midjourney for high-aesthetic ideation, Firefly for Adobe/legal comfort, Ideogram for text-heavy visuals and logo comps.
Video / avatars	Runway	Best pure generative video tool in this set.	Synthesia; HeyGen	Choose Synthesia or HeyGen when the real need is avatar explainers, training, or multilingual spokesperson videos.
Audio / podcasting	ElevenLabs	Best voice generation quality and breadth of AI audio capabilities.	Descript; Riverside; Adobe Podcast	Choose Descript for edit-by-text, Riverside for remote recording quality, Adobe Podcast for cleanup and enhancement.
Website builders	Wix	Best all-around SMB choice when you need web + business features together.	Squarespace; Framer; Durable	Choose Squarespace for cleaner brand presentation, Framer for startup landing pages, Durable for fastest launch.
Productivity / marketing	Notion AI	Best AI workspace for docs, projects, and team knowledge.	Grammarly; Otter.ai; Jasper; Zapier	Choose Grammarly for writing quality everywhere, Otter for meetings, Jasper for marketing ops, Zapier for cross-app automation.

AI Tool Logos

ChatGPT · GitHub Copilot · Runway · ElevenLabs · Wix · Notion AI



ChatGPT



GitHub Copilot



Runway



ElevenLabs



Wix



Notion AI

AI Tool Logos

A quick reference sheet for common generative AI platforms



OpenAI



Claude



Gemini



Copilot



Perplexity



Midjourney



Hugging Face



Runway



ElevenLabs



Jasper

Right place. Right time. Right skills.

A hopeful conversation for Business Analysts, Product Owners, and Project Management professionals.

We are already sitting at the intersection of people, process, product, and technology.

Theme: transition, agency, and readiness for human + AI collaboration



THE WORK IS MOVING INTO THE “MISSING MIDDLE”

From doing the work to directing the work.

Human + Machine frames the future around collaborative intelligence: humans and AI redesigning work together.

Trainers

Teach AI what “good” looks like: context, tone, workflow, examples.

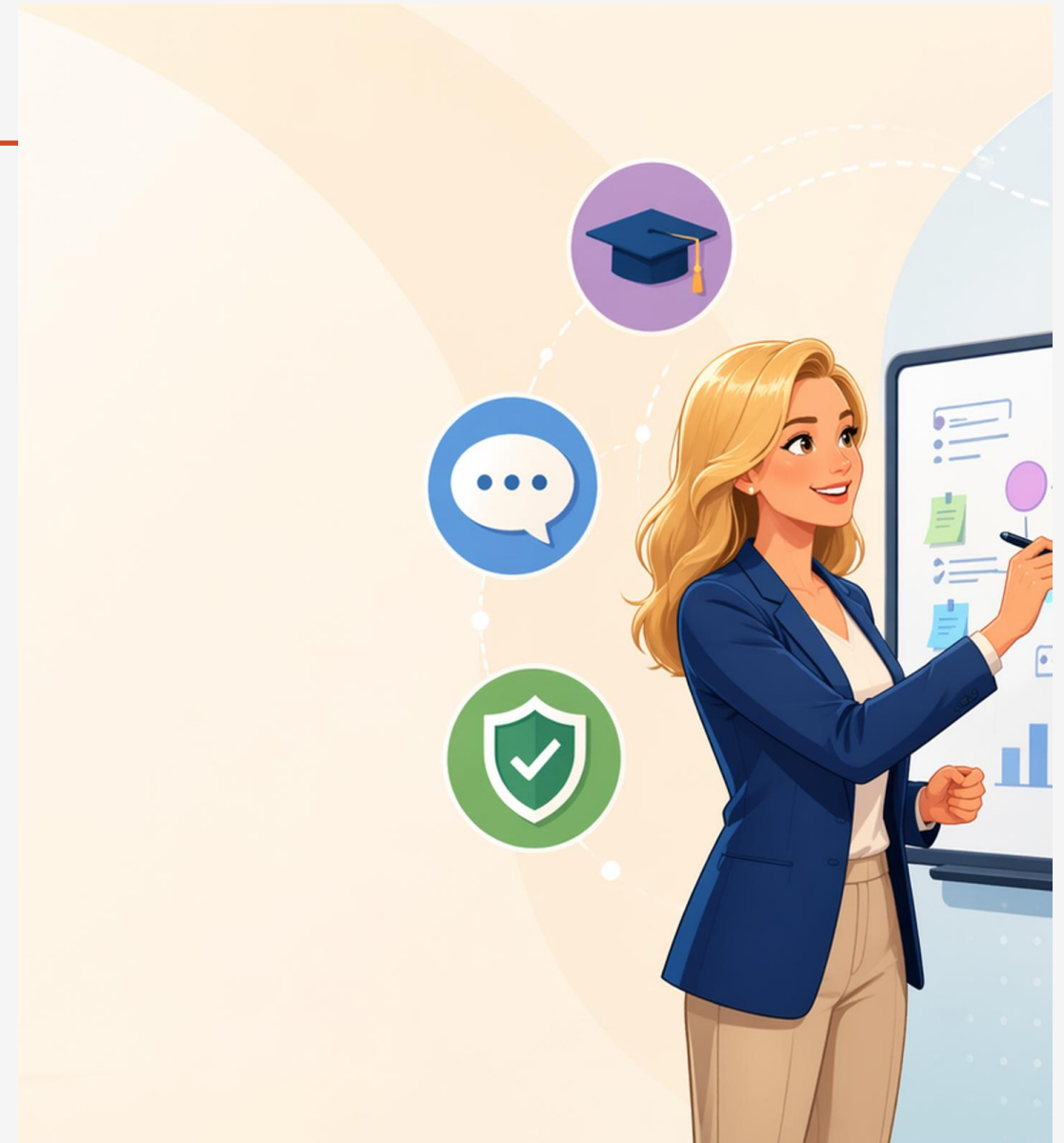
Explainers

Translate AI output into business logic, risks, and decisions.

Sustainers

Keep AI aligned, accurate, ethical, useful, and adopted over time.

That is familiar territory for BA / PO / PM talent.



FUTURE ROLES WHERE OUR SKILLS TRANSLATE DIRECTLY

These jobs are more hybrid

AI Product Strategist

Define problems, priorities, outcomes, and user value.

Prompt & Interaction Designer

Shape how people ask, review, and refine AI work.

Responsible AI Quality Steward

Test, govern, monitor, and improve AI-enabled outcomes.

AI Workflow Designer

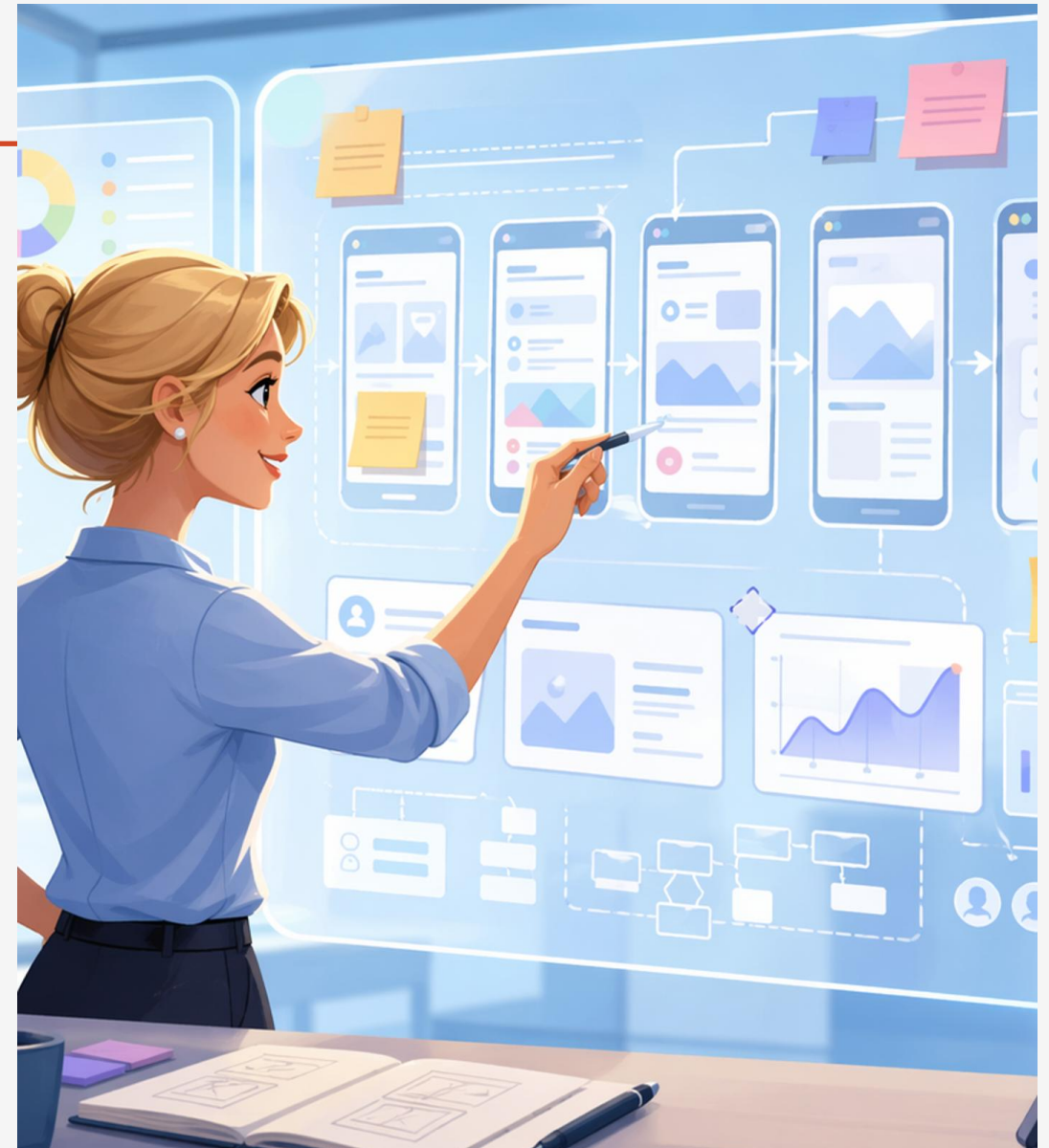
Redesign journeys, rules, handoffs, and operating models.

AI Decision Explainer

Turn model output into plain-language business decisions.

Human-AI Change Lead

Bring teams along: training, adoption, value realization.



WHAT WE BUILD NEXT

Skill Path is Clear & Achievable

AI Literacy

Know where AI helps, where it fails, and when humans decide.

UX / UI Thinking

Design the experience around real users, not just system output.

Storytelling + Change

Make the case, bring people along, and measure adoption.

Prompting + Requirements

Turn intent into crisp instructions, examples, and acceptance criteria.

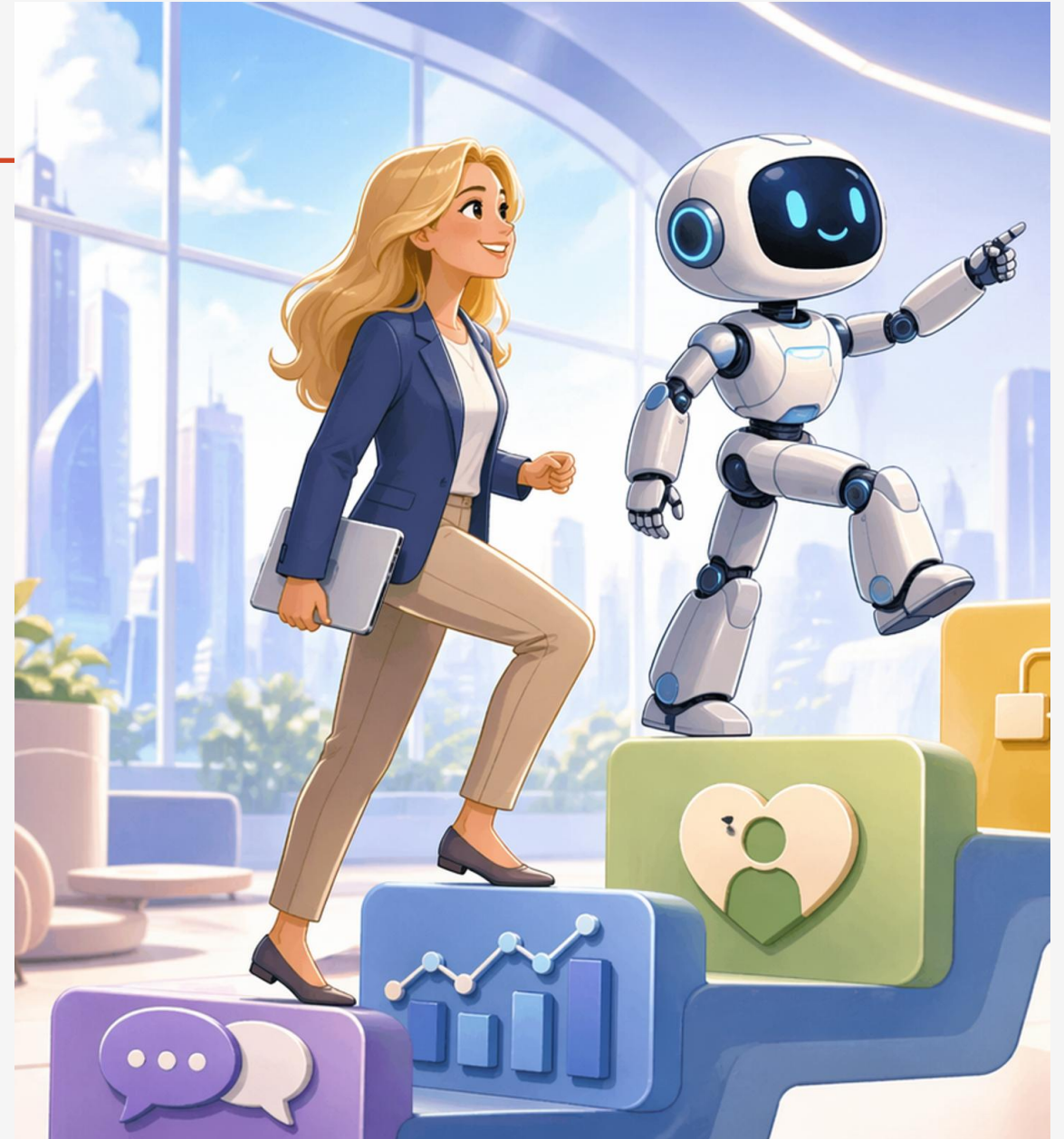
Validation + Governance

Test for accuracy, risk, fairness, privacy, and business fit.

Experimentation

Prototype quickly, learn, iterate, and scale what works.

**We do not start over.
We evolve on purpose.**



The Right Seat for Tomorrow

Our future role is to make sure what AI builds is actually what the business needs.

Ask better questions.

Clarify the problem and success criteria before the tool starts building.

Validate better outcomes.

Confirm quality, trust, value, and adoption.

Design better experiences.

Shape the human journey around AI-enabled work.

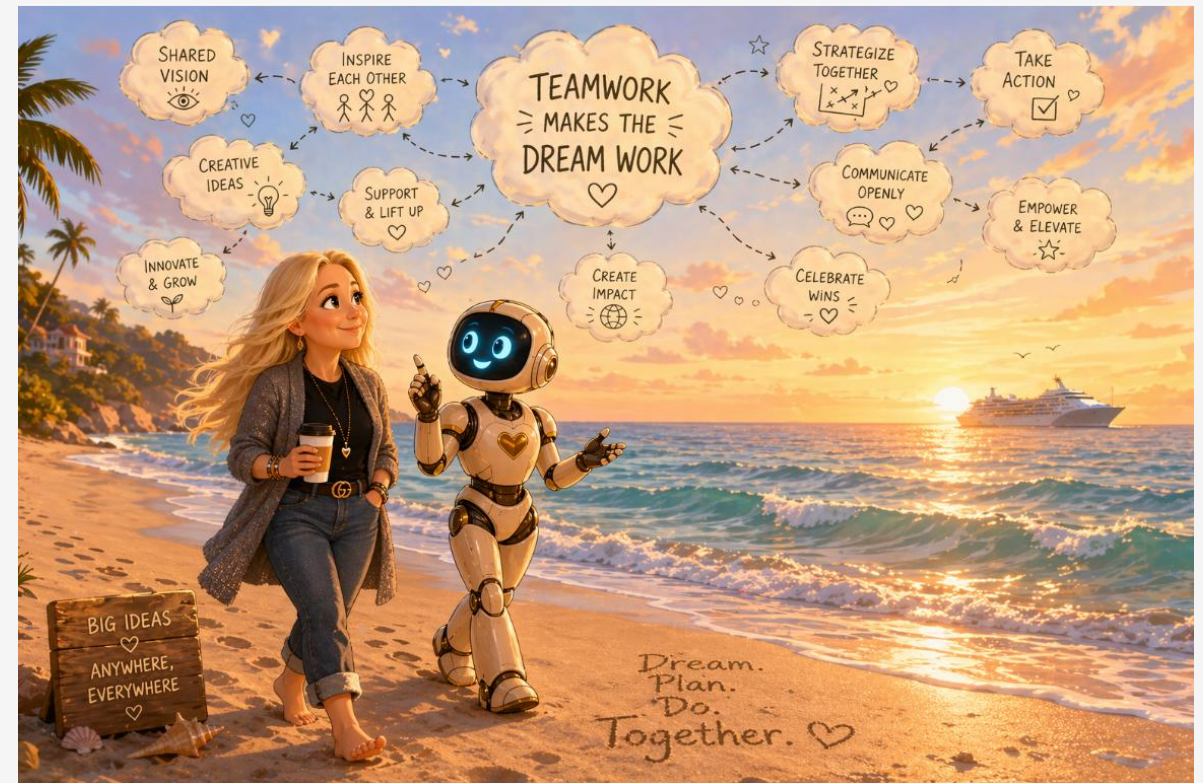
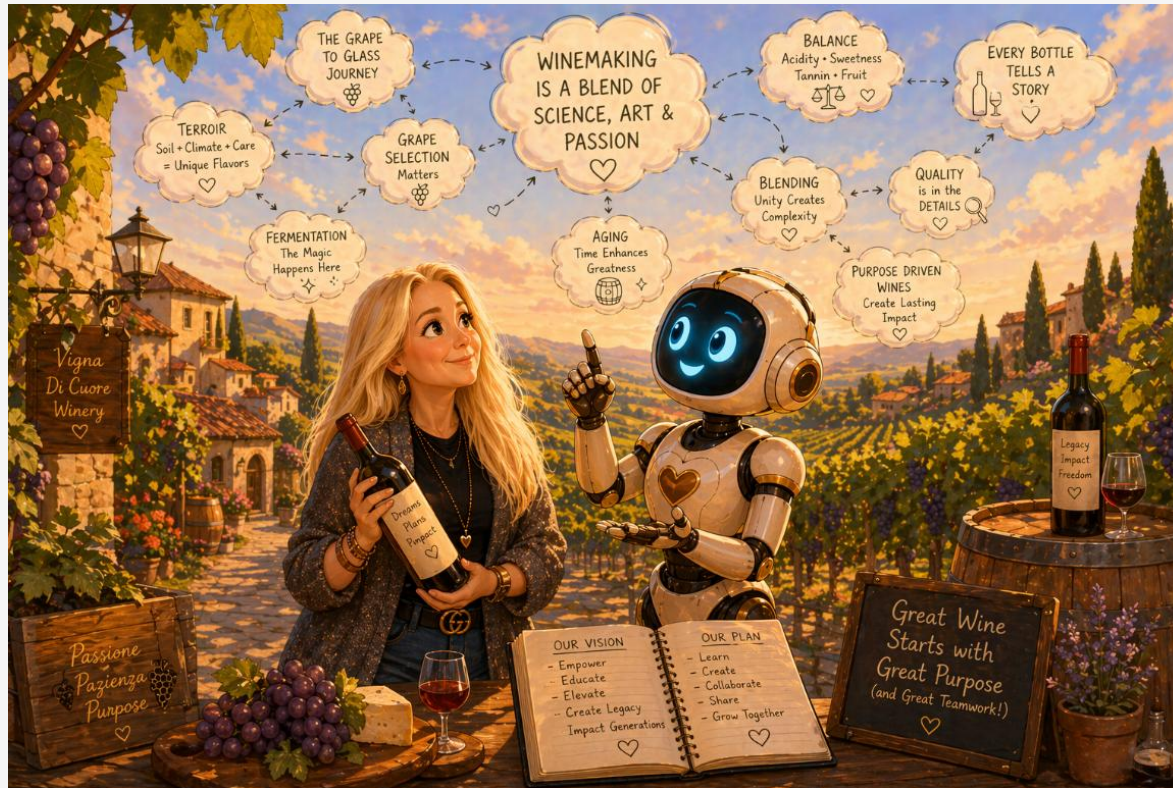
Lead the transition.

Bring confidence, structure, and hope to the team.

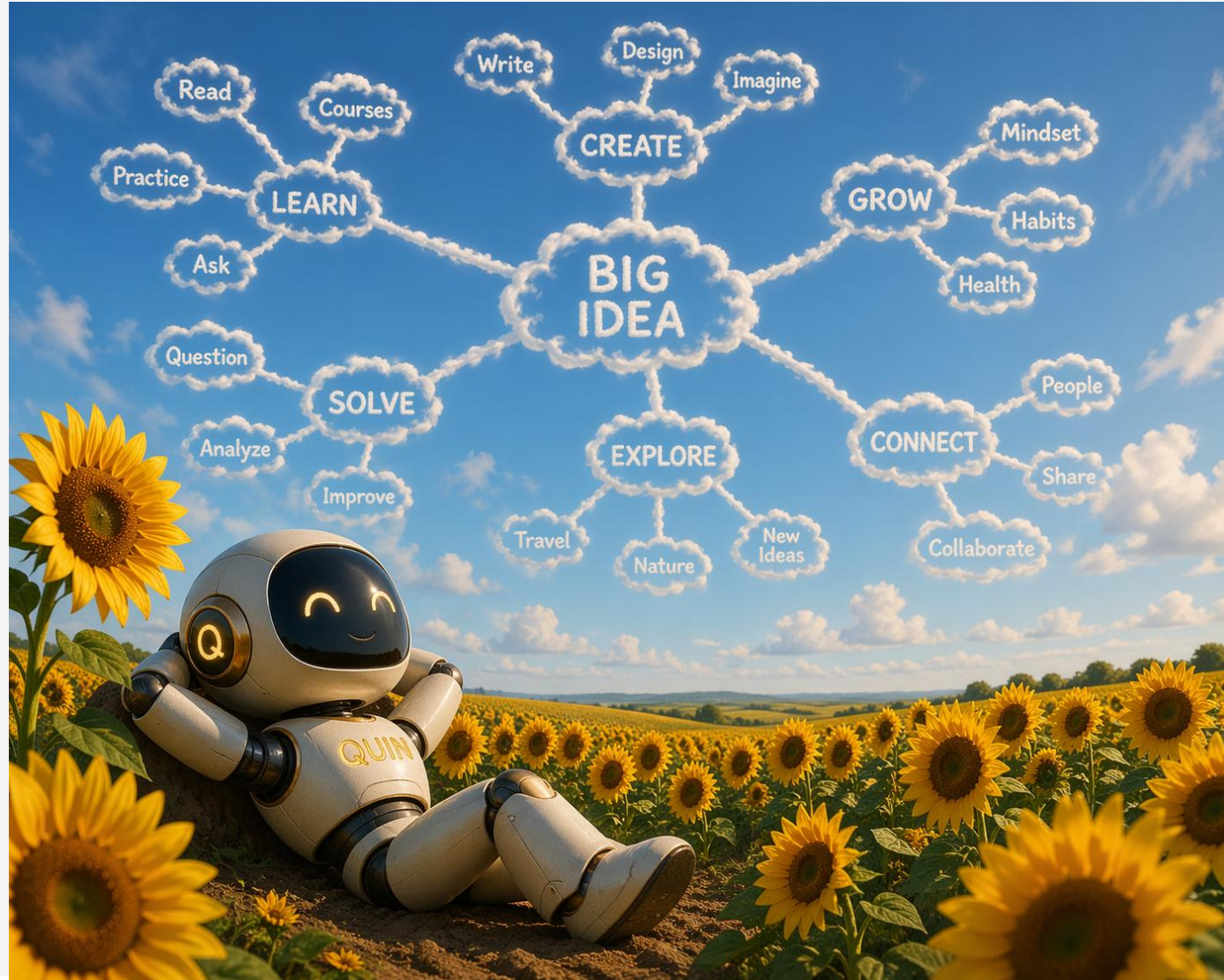
Learn the tools. Keep the judgment. Lead the future.



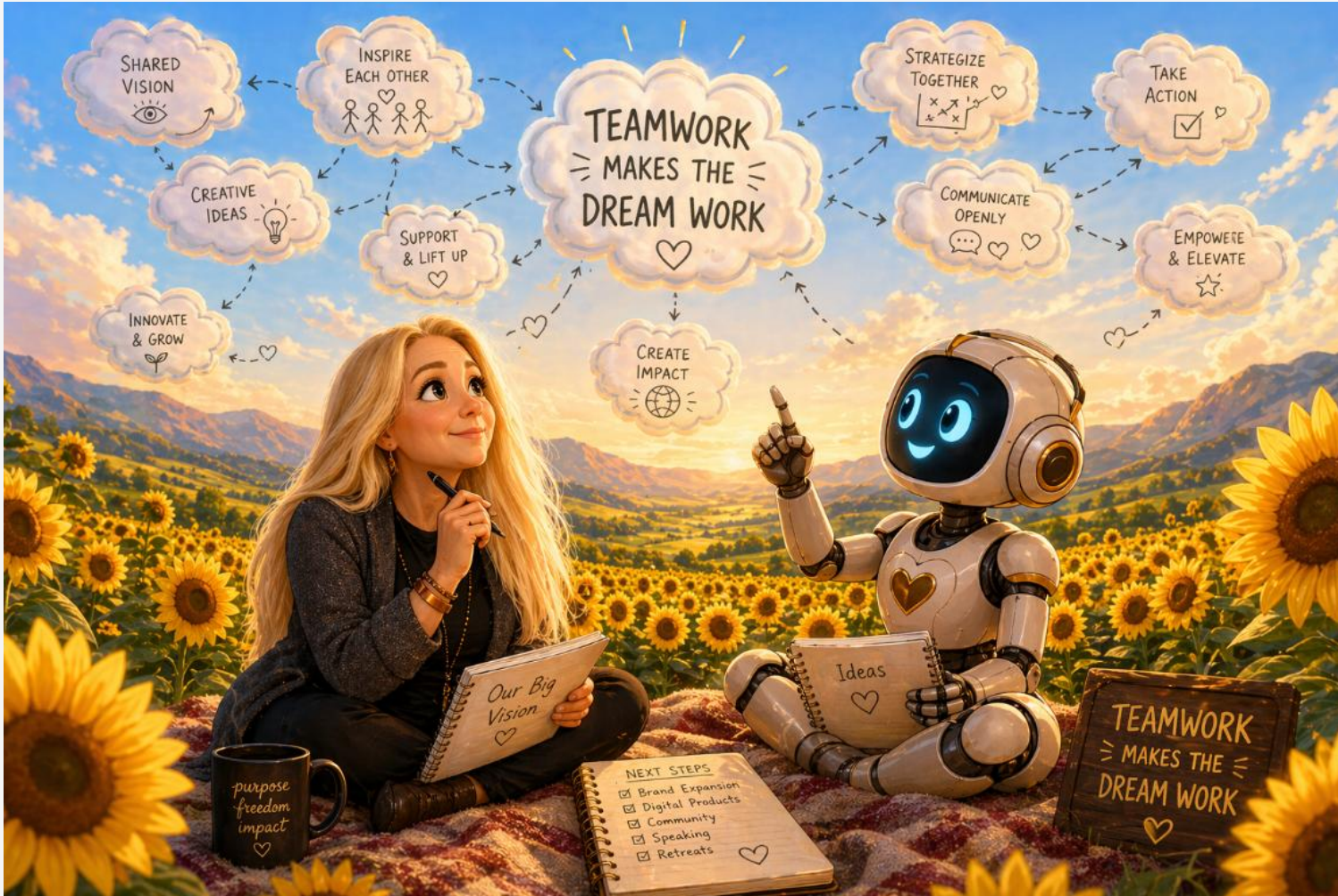
The Future is Ours for the Imagination!



Q & A



Thank You



Angela Weller

515-770-5812

anzela998@gmail.com

Linkedin: anzela998