

AI for Project Management

14 PMI PDUs | 14 IIBA CDUs



Marc Balcer
Instructor

Format: Live Instructor-Led
Online through Zoom

Date: June 15 - 17, 2027

Time: 12:00 PM - 4:30 PM ET

Price: \$650 per person

To register:

Email Chris Remmert
cremmert@nysforum.org
and indicate the course
title in the subject line.

Technology and Attendance Requirements:

Computer with a
browser, Zoom, a
microphone and
speaker. For this
workshop, camera
should be on if possible
and you must be
actively participating.

Master generative AI for enterprise project management. Leave with the working artifacts to prove it.

The future of project management lives at the intersection of human creativity and technological leverage. This immersive, hands-on three-day course prepares experienced project professionals for an AI-empowered future — equipped with actionable strategies and a set of working artifacts you build live, not just notes you take.

Designed for experienced project managers in enterprise environments, the class covers what generative AI can and can't do, how to prompt it well, and where it fits across the project lifecycle. You'll work a single realistic case study from first principles through to a final adoption plan, practicing in a persistent team throughout.

Along the way you'll build a prompt playbook, a prioritized use-case map, planning and lifecycle deliverables, an ethics-and-governance audit, and both a team adoption plan and a personal development roadmap. By the end of Day 3, you'll be ready to apply an AI-enabled project management approach across any framework or toolset.

Certification



An AI for Project Management digital badge from SoftEd, awarded on successful completion



14 PMI® Professional Development Units (PDUs) toward your chosen certification — 12 Ways of Working and 2 Business Acumen.

AI for Project Management

14 PMI PDUs | 14 IIBA CDUs

Learning Outcomes:

During this course you will learn about:

- Explain what LLM-based generative AI can and can't do — and recognize the "confidence trap" before it costs you.
- Prompt effectively using a structured, iterative approach (the COSTAR framework).
- Identify and prioritize AI use cases with an automation / augmentation / transformation lens and a feasibility-impact matrix.
- Evaluate AI tooling — embedded, standalone, and private LLMs — using the DVF (Desirability, Viability, Feasibility) framework.
- Apply AI across the project lifecycle in both predictive and adaptive environments.
- Use AI for data analysis, validation, summarization, and information retrieval — and verify its output.
- Manage ethics, bias, disclosure, data privacy, and compliance in AI-assisted projects.
- Build a team AI adoption roadmap grounded in change-management practice (the adoption curve, ADKAR, SMART goals, and ROI).
- Leave with a personal 30/90-day development roadmap to sustain momentum after class.

Prerequisites

- **Foundational project management knowledge** — through formal training such as our Project Management Fundamentals or Project Management Professional (PMP) courses, or relevant experience in a project management context.
- **Access to at least one generative AI tool during class** — ChatGPT, Claude, Copilot, or Gemini (any one is sufficient).

Great for:

- Project Managers
- IT Project Managers
- Program Managers
- Agile Coaches/Scrum Masters
- Product Managers
- Project Directors/Portfolio Managers
- Project Coordinators
- PMO Managers
- Business Analysts
- Operations/Digital Transformation Managers

AI for Project Management

14 PMI PDUs | 14 IIBA CDUs

Content:

Ten sections across three days, built around a single realistic case study and a persistent team. Lecture is kept tight; most of class is spent building.

DAY 1 - FOUNDATIONS

Section 1 — Class Intro & Orientation

What this class is — and what it isn't. An overview of the AI landscape and how generative AI is reshaping project management work.

Section 2 — What LLMs Actually Do

A clear-eyed look at capabilities and limits, and how to get real value out of these tools.

- AI capabilities, limitations, and realistic expectations
- The "confidence trap": why polished output isn't the same as correct output
- Prompting as a two-way dialectic; establishing context
- The COSTAR prompting framework

Practice: Working in teams, build a reusable Team Prompt Playbook.

Section 3 — Where AI Fits in Your Work

A structured way to decide what to point AI at first.

- Automation vs. augmentation vs. transformation
- The feasibility / impact prioritization matrix
- AI use cases across PMBOK, Agile, and hybrid approaches

Practice: Run an AI use-case hunt and produce a prioritized use-case map that carries through the rest of the course.

DAY 2 — HANDS ON KEYBOARD

Section 4 — The AI-Enhanced PM Toolkit

The landscape of AI tooling and how to evaluate it.

- Embedded AI vs. standalone GenAI — strengths, tradeoffs, and a decision framework
- The internal / private LLM stack and its core components
- Evaluating a major AI decision with the DVF framework (Desirability, Viability, Feasibility)

Practice: Complete a Tool Fit Assessment for your real-world tasks.

AI for Project Management

14 PMI PDUs | 14 IIBA CDUs

Section 5 — AI Across the Project Lifecycle

Applying AI methodology-agnostically across predictive and adaptive work — the AI drafts the first 80%, you add the critical 20%.

- Planning: WBS decomposition and Agile story mapping
- Estimation: parametric models and velocity-based ("yesterday's weather") forecasting
- Execution and monitoring: status reporting, variance analysis, change-impact modeling

Practice: Build real planning and lifecycle deliverables with AI, then assess their quality.

Section 6 — Data, Code & Advanced Applications

The technical-augmentation toolkit — no coding background required.

- Data analysis and a validation-first "trust but verify" discipline
- Summarization and information retrieval across messy, scattered sources
- Formula, query, and script generation — verified on a sample before you trust it
- A primer on BDD and ATDD as collaboration practices
- The three core patterns: Extract, Synthesize, Compare

Practice: Put AI to work on real project data, including a hands-on data-quality validation exercise.

DAY 3 — GOVERNANCE, ROADMAP & FUTURE

Section 7 — Governance, Ethics & Compliance

The rules of the road for responsible, defensible AI use.

- Data privacy and security; tiered data handling and a traffic-light classification protocol
- Understanding and mitigating AI bias
- The PMI Code of Ethics applied to AI; disclosure and the "So What" test
- Legal, compliance, intellectual property, and vendor-contract considerations

Practice: Conduct an Ethics & Governance Audit of your own AI use cases.

Section 8 — Building Your Adoption Roadmap

Turning intent into a measurable, change-managed plan.

- Organizational readiness and the "In it / Can contribute / Recipient" posture
- The technology adoption curve and crossing the chasm
- Change management with ADKAR; enablers and blockers
- SMART goals, pilot design, and ROI calculation

Practice: Build a phased team AI adoption roadmap grounded in your real starting position.

AI for Project Management

14 PMI PDUs | 14 IIBA CDUs

Section 9 — Future Trends

A brisk horizon scan and a sustainable learning habit.

- Agentic AI, multimodal models, AI-native PM tools, and autonomous execution
- The evolving PM role and the AI credential landscape
- Resources and habits for staying current

Section 10 — Capstone

Everything comes together. You leave with two finished deliverables: a team AI adoption-plan pitch and an individual personal development roadmap. The session closes with PDU claim guidance and time for open discussion and Q&A.

Lecturing is kept to the minimum necessary where most of the learning is achieved by applying the practices and techniques in group exercises. Our LiveOnline delivery is over three days (each four and a half hours in duration). The instructor is 100% live and interaction and learning objectives are the same as our in-person classes with the added benefit of being able to take this course from your home, your office or your home office. Since this class is delivered over half-days it allows for greater flexibility and leaves you with time each day for other work or activities.