

PM AI WORKFLOW · SAMPLE WALKTHROUGH

AI-Assisted Project *Delivery*

How I use AI to produce first drafts of project documents faster, with a review step that catches errors before anything reaches a stakeholder.

USE WHEN	OWNER	PLATFORM	PAIRS WITH
Any project phase where a document starts from raw notes, emails, or a vague request	Project manager drafts with AI, reviews, and approves before sharing	The organization's approved AI platform, set up with the project's files and standards	PM Asset Library templates, so drafts arrive in the team's standard format

HOW THE WORKFLOW WORKS

1. **Set up the workspace once.** The charter, plan, risk register, glossary, and reporting standards live in one AI project, so every conversation starts with the full context.

2. **Every prompt follows one structure:** the situation, the role AI should take, the exact output format, and the limits on what it may use.

3. **Sources in, facts out.** AI works only from the material provided. Gaps are tagged [MISSING] and guesses are tagged [ASSUMPTION], never filled in quietly.

4. **Nothing goes out unchecked.** Each draft gets a reviewer pass, then my own check against the sources, before it reaches a stakeholder.

The *loop* behind every step

STAGE	WHAT HAPPENS	WHO OWNS IT
1 · Gather	Collect the raw material: notes, emails, the current register or plan	Project manager
2 · Draft	A structured prompt turns the material into the template's format	AI, from the sources only
3 · Challenge	A reviewer prompt lists unsupported claims, gaps, and overconfident wording	AI, as a skeptical reviewer
4 · Approve	Every number, date, and name checked against the source; final edits made	Project manager

OVERVIEW

A sample of the *workflow*

The complete workflow covers every project phase, plus meetings, reporting, and decision support. These ten steps are a sample, following one fictional project from a one-line request to closeout. Each step shows the prompt, what I give the AI, an excerpt of what it produced, and what I changed before anyone else saw it.

#	PHASE	STEP	EXAMPLE FROM THE NORTHFIELD PROJECT
1	Initiating	Clarify the request	A one-line request from the CEO becomes a set of scoping questions
2	Initiating	Draft the charter	Scoping answers and the business case become a charter draft (T09)
3	Planning	Break the scope into a WBS	Charter deliverables become work packages, then a check for gaps (T22)
4	Planning	Sequence the work	Activities and estimates become a draft schedule with the critical path (T28)
5	Risk	Hold a pre-mortem	Three failure stories become a scored risk register (T43)
6	Stakeholders	Map stakeholders and plan communication	The RACI and my notes become a register and a communication plan
7	Monitoring and controlling	Write the weekly status report	A week of notes becomes a sponsor-ready status report (T62)
8	Any phase	Check the draft	A reviewer pass catches what the first draft got wrong
9	Change control	Assess a change request	A request to use the vendor's e-signature is assessed against the baselines
10	Closing	Close out and capture lessons	Results, changes, and retrospective notes become a closeout report

Guardrails on *every* step

Approved tools only	Client, confidential, and health information goes only into AI tools the organization has approved for that data.
Every figure verified	Numbers, dates, and names are checked against the source before anything is shared.
Certainty matches evidence	Wording is reviewed so a forecast never reads as a promise.
People decide	AI drafts. The project manager approves and sends.

Completed examples use a fictional company, Northfield Creative Group, and match the completed examples in my PM Asset Library. Names, dates, and figures are illustrative. Prompts are shown in general form, with [brackets] for the material each project supplies.

STEP 1 · INITIATING

1 Clarify the *request*

A vague request can't be planned. Before any charter work, AI turns the request into the questions that have to be answered first.

THE PROMPT

You are an experienced project manager helping me scope a new request. Here is the request, exactly as I received it: ""[request]"". Before suggesting any plan, ask me the questions I need answered to write a project charter. Group them under five headings: purpose and success, scope and boundaries, people and decisions, time and money, and risks and constraints. Ask no more than 15 questions, most important first. Don't assume any answers. Where an answer could change the size of the project, say so.

What I give it: the request word for word, plus any business case or background already on file.

COMPLETED EXAMPLE · ILLUSTRATIVE

Request from Dana Whitfield, CEO, December 2026

"New clients keep telling us onboarding is slow and messy. Can we get a proper portal in place next year?"

AI output, excerpt (6 of 14 questions):

- **Purpose and success:** How long does onboarding take today, from signed contract to work starting? What target would count as success?
- **Scope and boundaries:** Should the portal cover contracts and billing, or only creative briefs and setup? **Size flag:** adding billing means another system integration and a larger budget.
- **People and decisions:** Who approves the final scope, and who owns the client experience day to day?
- **Time and money:** Is there a date the portal must be live by, and a budget range to plan within?
- **Risks and constraints:** Will client contracts and files be stored in the portal? If so, which security and privacy reviews apply?
- **Risks and constraints:** Which existing systems, such as the CRM, does the portal need to connect to?

MY REVIEW

Removed two questions the business case already answered. Added one the AI missed: who signs off on the security review. Sent the final list to Dana before our kickoff, so the meeting started with answers instead of questions.

STEP 2 · INITIATING

2 Draft the *charter*

With the answers in hand, AI drafts the charter in the library's format. Anything it can't support from the sources is tagged, not invented.

THE PROMPT

Using only the notes and documents attached, draft sections 1 to 6 of a project charter in the format of the attached template [T09 Project Charter]. If a section needs information I haven't provided, write [MISSING: what's needed] instead of filling the gap. Tag anything you inferred as [ASSUMPTION]. Write each objective as a measure, a target, and a date. At the end, list any places where my sources disagree with each other.

What I give it: the answered scoping questions, the business case, the finance estimate, and the blank charter template.

COMPLETED EXAMPLE · ILLUSTRATIVE

Client Onboarding Portal · charter draft, excerpt

OBJECTIVE	MEASURE	TARGET	BY WHEN
Faster onboarding	Business days, first contact to setup	5 to 2 days	Sep 1, 2027
Online adoption	Share of new clients onboarded online	90%	Sep 1, 2027
Protect confidentiality	Confidentiality incidents	Zero	Through Dec 1, 2027

[MISSING: sponsor sign-off date]

[ASSUMPTION: the June 1 go-live depends on the vendor contract being signed by February 12]

Sources disagree: the business case lists a \$180,000 budget; the finance estimate lists a \$185,000 baseline plus a \$15,000 management reserve.

MY REVIEW

Confirmed the \$185,000 baseline and \$15,000 reserve with finance, then updated the business case so both documents match. Replaced the [MISSING] tag and checked every date against the milestone plan. Dana signed the charter on January 15, 2027.

STEP 3 · PLANNING

3 Break the scope into a *WBS*

AI turns the charter's deliverables into a work breakdown structure, then switches roles and checks its own draft for gaps before I see it.

THE PROMPT

Using the approved charter and requirements attached, draft a work breakdown structure in the format of [T22 WBS & WBS Dictionary]. Break the work down by deliverable, not by activity, to work packages of about 80 hours or less. Give each work package an ID, a deliverable, an owner role, and acceptance criteria taken from the requirements. Where work is managed in a product backlog, show it as one summary branch instead of breaking it down. Then act as a skeptical reviewer and list: any charter deliverable with no work package, any work package the charter doesn't need, and any acceptance criterion that can't be answered yes or no.

What I give it: the signed charter, the requirements list, and the blank WBS template.

COMPLETED EXAMPLE · ILLUSTRATIVE

Client Onboarding Portal · WBS draft, top level

BRANCH	OWNER	MANAGED THROUGH
1 · Contracts, privacy, and data migration	Elena Torres	Work packages, such as 1.4.2 trial migration
2 · Portal interface, Release 1	Marcus Reyes	Product backlog, as one summary branch
3 · Training and adoption	Amy Price	Work packages, such as 3.2.1 coordinator training
4 · Project management	Amy Price	Planning, reporting, and closure

Reviewer findings, excerpt:

- The charter objective "Protect confidentiality" has no work package that sets how long client data is kept.
- 3.2.1 acceptance reads "coordinators comfortable with the portal." That can't be answered yes or no.

MY REVIEW

Added 1.1.2, a retention schedule owned by Elena Torres, and rewrote the training criterion as "all 6 coordinators trained by May 28." Walked each branch with its owner and replaced the AI's effort figures with their estimates. Dana approved the WBS with the scope statement on February 9, 2027.

STEP 4 · PLANNING

4 Sequence the *work*

AI drafts the sequence and the critical path from the team's own estimates. The scheduling tool, not the AI, has the final say on the math.

THE PROMPT

Using the WBS and the team's duration estimates attached, list the activities in order with their predecessors and dependency type. Use only the durations provided; where one is missing, write [MISSING] instead of estimating. Identify the likely critical path and the float on each other chain, and show the logic you used. Flag any activity with no predecessor or successor, any dependency that crosses workstreams, and any date that falls on a weekend or holiday. Present it as a table I can enter into our scheduling tool.

What I give it: the approved WBS, duration estimates from each work package owner, the vendor's sprint calendar, and the team's holiday calendar.

COMPLETED EXAMPLE · ILLUSTRATIVE

Draft schedule logic · excerpt

ACTIVITY	DEPENDS ON	DAYS	FLOAT
Vendor contract signed (M03)	None	0	Critical
Build Release 1, Sprints 1 to 6	Contract	60	Critical
Run user acceptance testing	Build, security review	8	Critical
CRM spec, integration, and security review (M04)	Contract	33	22 days
Train coordinators	UAT	4	1 day

Flags: coordinator training has only one day of float, so treat it as near-critical. Go-live calculates to Monday, May 31, which is on the holiday calendar.

MY REVIEW

Entered the logic into the scheduling tool and let it calculate the critical path; it matched the draft. Moved go-live to Tuesday, June 1, and confirmed the 22 days of float on the security review chain with Priya Shah. The schedule baseline was approved with PM plan v1.1 on February 17, 2027.

STEP 5 · RISK

5 Hold a *pre-mortem*

Asking what could go wrong gets polite answers. Asking AI to explain how the project already failed gets specific ones, and those become the risk register.

THE PROMPT

Imagine it's [date six months from now] and this project has failed. Using the charter, schedule, and WBS attached, write three short, specific stories of how it failed, each from a different cause. Then turn the stories into a risk register in the format of [T43 Risk Register]. Write each risk as cause, risk, and effect. Score probability and impact from 1 to 5, propose a response, and give every risk a measurable trigger. Leave owners blank for me to assign. List no more than 12 risks, highest score first.

What I give it: the charter, the draft schedule and WBS, and the vendor's statement of work.

COMPLETED EXAMPLE · ILLUSTRATIVE

Failure story 1 of 3

"The CRM's interface documentation was thin, so the integration took twice as long as planned. Testing slipped, the security review moved, and go-live moved to July."

ID	CAUSE · RISK · EFFECT	SCORE	TRIGGER
R-01	Because the CRM's interface is poorly documented, integration may run long, delaying testing and go-live	16	Integration test not passing by Mar 12
R-04	Because the portal holds contracts and billing data, the security review may find privacy gaps, delaying go-live	15	Any high finding in the privacy pre-check
R-02	Because coordinators are used to email onboarding, they may bypass the portal, missing the 90% target	12	Draft: "low engagement"

MY REVIEW

Rewrote the R-02 trigger as something we could count: fewer than 4 of 6 coordinators taking part in testing. Assigned owners in the risk workshop, and each owner agreed to their risk and its score before it went into the register.

STEP 6 · STAKEHOLDERS

6 Map stakeholders and plan *communication*

AI turns the RACI and my notes into a stakeholder register and a standing communication plan, so "keep informed" becomes a schedule, not a good intention.

THE PROMPT

Using the charter, RACI, and my notes on each person attached, build a stakeholder register with each person's role, influence, interest, what they need from the project, and preferred channel. Then draft a communication plan: for each audience, the message, format, frequency, owner, and template used. Describe each person by what they need, not by personality, in language I'd be comfortable with them reading. Flag anyone in the RACI who has no planned communication.

What I give it: the charter, the RACI matrix, and one line of notes per person from my kickoff conversations.

COMPLETED EXAMPLE · ILLUSTRATIVE

Communication plan · excerpt

AUDIENCE	WHAT THEY NEED	FORMAT AND FREQUENCY
Dana Whitfield, CEO and sponsor	Early warning on anything that commits money or risk	Status report every Friday; steering pre-read 2 business days ahead
Marcus Reyes, product owner	Backlog priorities and adoption progress	Sprint review every two weeks
Elena Torres, Contracts and Privacy	Evidence for the security sign-off, early	Privacy checkpoint at each security milestone
Six onboarding coordinators	Draft: "may resist the change"	Monthly update; champions at sprint reviews

Flag: the IT support analysts appear in the handover plan but have no planned communication.

MY REVIEW

Rewrote the coordinators' entry as a need: "hands-on practice and clear training dates before go-live." Added the IT support analysts to the knowledge-transfer sessions. Confirmed the Friday report and steering cadence with Dana before the plan went into the project workspace.

STEP 7 · MONITORING AND CONTROLLING

7 Write the weekly *status report*

A week of notes becomes a report the sponsor can act on. The colors come from thresholds agreed in advance, not from how the week felt.

THE PROMPT

Draft this week's status report for the sponsor and steering committee in the format of the attached template [T62 Status Report]. Use only these sources: [weekly notes], [risk register], and [milestone list]. Rate each area using only the RAG thresholds in section 8, and name the threshold that decided each color. Open with the overall status and a one-line reason. Give every risk and issue an owner and a next date. List any decisions needed from the sponsor, with a deadline and the impact of a late decision. Keep it under 400 words. If the sources disagree, flag it instead of choosing.

What I give it: my notes for the week, the current risk register and issue log, the milestone list, and the template with its agreed thresholds.

COMPLETED EXAMPLE · ILLUSTRATIVE

Weekly status · March 26, 2027 · excerpt

Overall: Amber, trend worse. The CRM contact sync failed its retest on March 24, which puts the April 9 security review at risk.

AREA	RAG	COMMENT	THRESHOLD APPLIED
Schedule	Amber	Security review (Apr 9) at risk; portal sprints on plan	Amber: 6 to 10 working days late, or at risk
Cost	Green	Spend on plan; no contingency drawn	Green: within contingency
Quality	Amber	Retest failed on duplicate contact records	Amber: off plan, recovery in hand

Decisions needed: approve, reject, or defer CR-01 (e-signature) by March 31; choose a CRM recovery option by April 1.

MY REVIEW

Checked each color against section 8 and confirmed owners and dates with Priya Shah and Elena Torres. Called Dana before sending, so the Amber reached her as a heads-up, not a surprise. Then ran the reviewer pass in step 8.

STEP 8 · ANY PHASE

8 Check the *draft*

AI writes with confidence whether or not it's right. Before any draft is shared, a second prompt reviews it against the sources and lists what doesn't hold up.

THE PROMPT

Act as a skeptical reviewer. Compare the draft below with the source material. In a table, list: (1) any statement, number, date, or name in the draft that the sources don't support; (2) anything in the sources a sponsor would expect to see that the draft leaves out; (3) any wording that sounds more certain than the evidence allows. For each item, quote the draft, cite the source, and suggest a fix. Don't rewrite the draft. If a category has no findings, say so.

What I give it: the draft, plus the same sources used to write it.

COMPLETED EXAMPLE · ILLUSTRATIVE

Reviewer pass on the first status draft, March 26, 2027

DRAFT SAYS	SOURCE SAYS	SUGGESTED FIX
"Go-live remains on track for June 1."	Risk register: the security review is at risk, and go-live depends on it	"Go-live is at risk if the April 9 security review slips."
"Clearpath will fix the sync by April 6."	Vendor email: a second retest is planned for April 6	"Clearpath expects to retest on April 6."
"Spend to date: \$112,800."	Release plan: \$112,800 is the Release 1 budget, not spend to date	Report spend against plan from the budget log
<i>Not mentioned</i>	Risk R-04: privacy findings pending the March 26 pre-check	Add R-04 under open risks, with owner and date

MY REVIEW

Accepted three of the four fixes as written. For the spend figure, I pulled the correct number from the budget log myself rather than taking another AI estimate. The report went out the same afternoon.

STEP 9 · CHANGE CONTROL

9 Assess a change request

AI lays out the full impact of a change against the baselines, so the sponsor decides on facts. The math is shown line by line, and anything unconfirmed is tagged.

THE PROMPT

Act as a change control analyst. Assess the attached change request against the current baselines: [scope statement], [schedule], [budget], and [risk register]. Summarize the change in one sentence. Then show its impact on scope, schedule, cost, quality, and risk, citing the baseline each figure comes from, and show the cost math line by line. Recommend approve, reject, or defer, with the reason, and name who has authority to decide under the change control plan. If anything needed for the decision is unconfirmed, tag it [MISSING] instead of assuming.

What I give it: the change request form, the baselines it touches, the vendor contract, and the change control section of the PM plan.

COMPLETED EXAMPLE · ILLUSTRATIVE

CR-01 · Use the vendor's built-in e-signature in place of the custom signing step

AREA	IMPACT	SOURCE
Scope	Removes the custom signing story; the contract step uses native e-signature	Portal backlog, US-08
Schedule	No change to the critical path; frees capacity in a later sprint	Schedule baseline, Feb 17
Cost	Custom build \$2,500 removed; native e-signature \$0 → net – \$2,500	Budget workbook
Quality	Signed contracts must still meet the retention rules	Retention schedule, 1.1.2
Risk	Turns opportunity O-01 into a confirmed saving	Risk register

[MISSING: written confirmation that e-signature is included in the vendor's fixed price]

Recommendation: approve. Scope changes go to Dana Whitfield under section 7 of the PM plan.

MY REVIEW

Got the fixed-price confirmation from the vendor in writing, and Elena Torres confirmed signed records meet the retention rules. Dana approved CR-01 before the March 31 deadline. I recorded the decision in the change log and updated the budget and backlog the same day.

STEP 10 · CLOSING

10 Close out and capture *lessons*

AI compares results with the charter and turns retrospective notes into lessons with owners, so they change the next project instead of sitting in a folder.

THE PROMPT

Using the charter, final status report, change log, risk register, and retrospective notes attached, draft a closeout report in the format of [closure report template]. Compare each charter objective and target with the results so far, citing the source for each result. Where an objective can't be measured yet, say when it will be and who will measure it. Write each lesson as what happened, why, and what we'll do differently, with an owner. Keep what worked separate from what didn't. Use only the attached sources.

What I give it: the charter, final status report, change log, risk register, and notes from the team retrospective.

COMPLETED EXAMPLE · ILLUSTRATIVE

Closeout report · excerpt

CHARTER TARGET	RESULT AT CLOSEOUT
Go-live milestone, June 1	Live June 1, 2027, as planned
Onboarding in 2 business days	Not measurable yet. Measured at the September 1 benefits review by Marcus Reyes
\$185,000 cost baseline	Within the cost baseline. CR-01 saved \$2,500; CR-02 used \$1,200 of contingency

Lesson, excerpt: the CRM integration risk (R-01) occurred when the sync failed its retest. **Why:** the interface was tested after the contract was signed. **Next time:** test the integration before choosing a vendor. **Owner:** Priya Shah.

MY REVIEW

Checked each result against its source system, not the draft. Shared the lessons with the team to confirm the wording before filing them. Dana gave final acceptance on June 25, the project closed on July 9, 2027, and the benefits measures passed to Marcus Reyes for the September review.