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Dayton/
Miami Valley Ohio



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FROM NOISE TO NOTES: USING MICROSOFT COPILOT + POWER APPS TO ROCK YOUR PRODUCT REQUIREMENTS



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BUSINESS ACUMEN

HOUSEKEEPING



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**EACH SESSION
IS RECORDED**



**YOU WILL
RECEIVE A LINK
TO SLIDES AND
THE RECORDING**

From Noise to Notes: Transforming Project Documentation with AI and the R.I.F.T. Framework

USING MICROSOFT COPILOT STUDIO
NOTEBOOKS + POWER APPS TO ROCK
YOUR PROJECT REQUIREMENTS
BY KRIS JONES



About [Kris Jones](#)



Bio:

- Professor of Information Systems at UC, Lindner College of Business
- Chief Transformation Officer and Advisory Board Member at Blue Bridge People
- Former Technical Leader who led over 120 developers, product owners, program managers and BAs for a Fortune 500 organization
- Startups --> Higher Ed. --> SaaS-> Fortune 300 --> Fintech/Ed tech --> back to Higher Ed.
- Specializing in building all-in-one software, greenfield /extension projects, RAG Agents and automating core workflow processes

The Documentation Challenge



We're Drowning in Project Information



Emails



Excel Sheets



PDFs



Slides



Sticky Notes



Requirements live everywhere

Scattered across emails, spreadsheets, documents, and conversations with no single source of truth



30-40% of PM time = locating or recreating info

Project managers spend nearly half their time hunting for information that should be readily available



Version control nightmares

Multiple versions of the same document create confusion, errors, and costly rework

The Tools Are Great — The Firewalls Are Greater



Blocked by Firewall



ChatGPT



Gemini



NotebookLM



Behind the Wall (Safe)



Microsoft 365



Cloud AI tools often violate enterprise data policies



Compliance risk: sensitive data leaving the environment

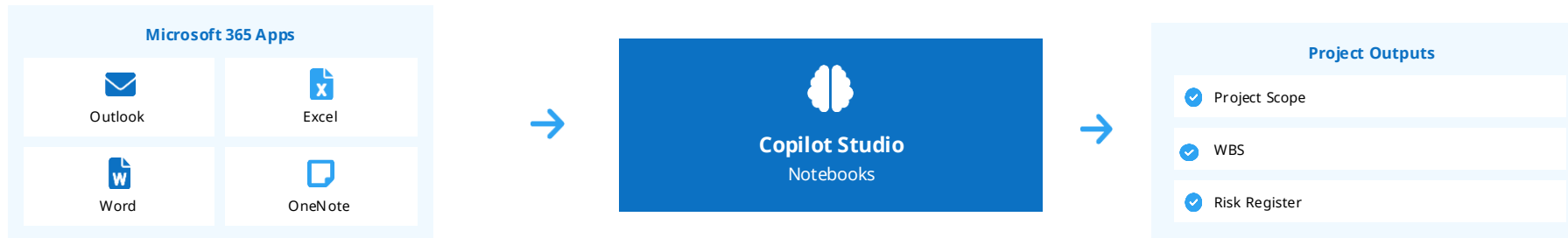


Innovation stalled by security — the irony of modern enterprise

A blue ballpoint pen with a silver-colored tip and clip is positioned diagonally across the frame. It rests on a document featuring a bar chart with several blue bars of varying heights. The background is a light blue-grey color with a subtle grid pattern.

Microsoft 365: A Potential Secure Solution for Project Documentation

Your Enterprise-Grade AI Playground



Built-in security, data compliance, and governance

Your data stays within your organization's security perimeter with enterprise-grade protection



Copilot Studio Notebooks = your internal AI workspace

A secure environment where AI understands your project context without external exposure



No external data transfer needed

Everything happens inside Microsoft 365 — no compliance violations, no security risks

Disconnected Knowledge = Disconnected Teams



Project Manager

Searching for answers



Requirements v3_final_v2



Stakeholder email thread



Budget tracker (outdated)



Meeting notes (somewhere)



Fragmented data = fragmented decisions

When project knowledge lives in silos, teams make decisions based on incomplete information



Documentation sprawl creates risk and rework

Disconnected documents lead to misalignment, duplicated effort, and costly mistakes



We need a connected, traceable structure

The solution isn't more documentation — it's smarter, more connected documentation

The background is a dark, complex digital collage. In the center, a large, translucent, multi-faceted crystal or prism glows with a bright light, casting a horizontal beam. To the left, there's a dense, colorful cluster of small, irregular shapes in shades of blue, green, and purple. To the right, a wireframe city skyline is visible, with various rectangular panels and data visualizations floating around it. The overall aesthetic is futuristic and high-tech.

The R.I.F.T. Framework: Turning Chaos into Clarity

Introducing the R.I.F.T. Framework

Retrieve · Inform · Formulate · Trace



1 Retrieve

Organize data — Gather all project context materials into one workspace



2 Inform

Teach AI — Add context and meaning to guide intelligent reasoning



4 Trace

Maintain Traceability — Link outputs to sources for transparency



3 Formulate

Generate Docs — Create intelligent, traceable documentation

R.I.F.T. is the method to turn project chaos into clarity — all within Microsoft 365

Step 1: Retrieve — Build Your Project Brain



Outlook



OneNote



Excel



Word



PowerPoint



Copilot Notebook

Scope

Risks

Deliverables

Stakeholders

✓ **Gather all project context materials** from across your Microsoft 365 environment

✓ **Organize by category** (Scope, Risks, Deliverables, Stakeholders)

✓ **Keep naming conventions consistent** for easy retrieval and AI understanding

Step 2: Inform — Teach Copilot What Your Data Means



This is where the magic happens

Retrieval gives Copilot **access** — but Inform gives it **understanding**. Here, you're not feeding data — you're teaching meaning.



Add context: what's in each document

Label and describe each file so Copilot understands its purpose and content. Example: "This Excel file contains task allocations for Q1 deliverables."



Define purpose and relationships

Explain how documents connect to each other. Example: "When drafting the schedule, use this file for dates and cross-reference with the stakeholder matrix."



Use prompt engineering to guide AI reasoning

Craft clear instructions that shape how Copilot interprets and uses your data. Example: "List deliverables as bullets and cite the source document for each."

“ **Think of Copilot like an eager intern** — it's smart, but it needs direction. The clearer you are, the better your results.

Prompt Engineering: The Heart of Inform

How to Inform Through Prompts

📁 Context	📋 Instruction	≡ Formatting
"This Excel file contains task allocations."	"When drafting the schedule, use this file for dates."	"List deliverables as bullets and cite the source."
"This email thread documents stakeholder approval for Phase 2."	"Reference this when identifying decision-makers and sign-off authority."	"Present risks in a table with columns: Risk, Impact, Mitigation."
"This Word doc contains the original project charter from January."	"Use this as the baseline for scope and objectives."	"Format as a numbered list with sub-items for each phase."
"This OneNote page has meeting notes from the kickoff session."	"Extract action items and open questions from this source."	"Organize by priority: High, Medium, Low with clear labels."

 **Pro Tip:** The clearer and more specific your prompts, the more accurate and useful Copilot's outputs will be. Think of each prompt as teaching an assistant exactly what you need.

Step 3: Formulate — Generate Living Documentation



AI-Powered
Generation



Generated Documents

 Project Scope

 WBS

 Risk Register



Context-aware generation

Copilot uses the context you've provided to create documentation that reflects your specific project needs



Traceable sources

Every generated document includes citations to source materials, ensuring transparency and auditability



Living documentation

As your project evolves, you can regenerate documents with updated information while maintaining traceability



Once Copilot understands your context, it can generate documents — scope, WBS, risk register — with traceable sources. This is where information becomes insight.

Step 3: Formulate — Example Output

Example: AI-Generated Project Scope

Project Scope: Apollo CRM Upgrade

Objectives:

- Streamline sales workflows and reduce manual data entry
- Integrate with existing marketing automation platform
- Improve customer visibility and reporting capabilities

Constraints:

- Timeline: 12 weeks from project kickoff
- Budget: \$250,000 (including licensing and implementation)

Sources:

 Kickoff Email (Outlook)  Budget Sheet (Excel)

 **Once Copilot understands your context,** it can generate documents; scope, WBS, risk register — with traceable sources. This is where information becomes insight.

Step 4: Trace — Build Trust Through Transparency

Traceability in Action



Output

WBS_v1

(03/2025)



Traced to



TaskTracker.xlsx



KickoffNotes.one



Validator: K. Jones

Enterprise-safe documentation

Every insight can be traced back to its source, creating an audit trail that meets compliance requirements



Explainable AI for project documentation

Stakeholders can verify where information came from, building confidence in AI-generated outputs



Trust through transparency

Clear source attribution eliminates the "black box" problem and enables informed decision-making

Demo: From Chaos to Clarity

See the R.I.F.T. Framework in action



1. Retrieve

Import project content



2. Inform

Add context



3. Formulate

Generate deliverables



4. Trace

Verify sources



Start with the disorganized folder

See how scattered project files create confusion and inefficiency



Add files into Copilot Notebook and inform the AI

Watch how context and prompts transform raw data into understanding



Generate our first AI-generated scope

See Copilot create professional documentation with traceable sources



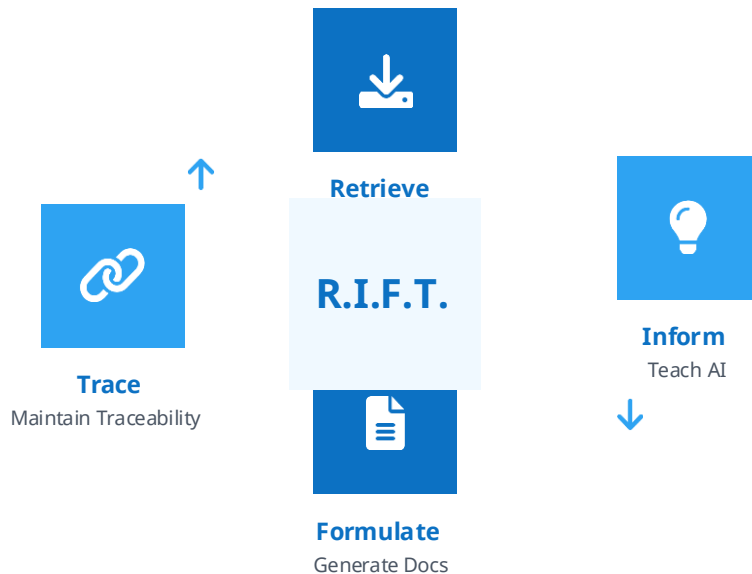
Notice the traceability built in

Every output lists source documents — that's the transparency you need

Live Demo

From Chaos to Clarity in Action

Live Demo in Progress



Why It Matters

Documentation Discipline + AI Innovation = Clarity

✗ Before R.I.F.T.

- ⚠ Scattered information across platforms
- ⚠ Hours wasted searching for documents
- ⚠ Version control nightmares
- ⚠ Duplicated effort and rework
- ⚠ Teams working from different sources

✓ After R.I.F.T.

- ✓ Centralized, organized knowledge base
- ✓ Instant access to contextual information
- ✓ Single source of truth with traceability
- ✓ AI-generated documentation with sources
- ✓ Aligned teams with shared visibility



Reduce duplication and rework — Stop recreating what already exists



Align teams on one version of truth — Everyone works from the same information



Automate without losing oversight — AI amplifies human intelligence, doesn't replace it

The Benefits of R.I.F.T.

What You Gain from R.I.F.T.

It's clarity, consistency, and control — all within tools you already have access to.



Centralized Knowledge

All project information organized in one secure workspace. No more hunting across emails, spreadsheets, and documents — everything you need is in your Copilot Notebook.



Contextual Generation

AI that understands your project context creates intelligent, relevant documentation. Copilot doesn't just generate text — it generates insight based on your specific needs.



Traceable Outputs

Every AI-generated document includes source attribution. You can verify where information came from, creating transparency and building stakeholder confidence in your deliverables.



Security + Compliance

Work within your organization's firewall with enterprise-grade security. Microsoft 365 keeps your data safe while enabling AI innovation — no compliance violations, no risk.

Key Takeaways

Start Small, Scale Fast

1

Pick One Project

Choose a single active project to pilot the R.I.F.T. method



2

Build Your Copilot Notebook

Gather and organize your project files in one workspace



3

Apply R.I.F.T. to Generate Deliverables

Use the framework to create your first AI-generated document



You don't need to overhaul your system

Just start with one project — test the R.I.F.T. process, see the clarity it brings, and expand from there



Start small, prove value, then scale

Once you see results on one project, you can apply R.I.F.T. across your entire PMO

The Secure Advantage



This isn't shadow IT — it's strategic IT



Enterprise-Grade AI Without Compromise



AI Inside Your Organization's Firewall

Your data never leaves your Microsoft 365 environment. No external APIs, no third-party platforms, no exposure risk. Copilot Studio Notebooks operate entirely within your secure tenant.



Aligned with IT and Compliance Standards

Built on Microsoft's enterprise infrastructure with SOC 2, GDPR, HIPAA, and other compliance certifications already in place. Your IT team can govern access, monitor usage, and maintain control.



Scalable for Real Projects

Start with one project, prove the value, then scale across your PMO. R.I.F.T. works for small teams and enterprise portfolios alike — no infrastructure overhaul required.

Backup Resources

Quick Reference for Q&A Support

</> Example Prompts

Project Scope:

"Generate a project scope document using the kickoff email and budget spreadsheet. Include objectives, constraints, and deliverables."

WBS:

"Create a work breakdown structure based on the project plan. Organize by phase and cite source documents."

Risk Register:

"List project risks from meeting notes. Format as table with Risk, Impact, Mitigation columns."

🔧 Troubleshooting

Can't find Copilot Studio?

Check with IT admin. Requires Microsoft 365 E3/E5 or Copilot for Microsoft 365 license.

Files not uploading?

Ensure files are in supported formats (PDF, Word, Excel, PowerPoint). Check file size limits (typically 10MB).

AI output not accurate?

Refine your prompts with more context. Use the "Inform" step to teach Copilot about relationships between files.

🛡️ Governance FAQs

Is my data secure?

Yes. Data stays within your Microsoft 365 tenant. No external transfer. Enterprise-grade encryption and compliance.

Who can access my Notebooks?

Only users with explicit permissions. IT admins can set access controls and monitor usage through Microsoft 365 admin center.

GDPR/HIPAA compliant?

Microsoft 365 maintains SOC 2, GDPR, HIPAA certifications. Copilot Studio inherits these compliance standards.

“

**Innovation doesn't require new tools,
just new ways of using the ones you
already have.**

”

**The R.I.F.T. Framework: Transforming Microsoft 365 into your AI-powered
project management engine**

Stay Connected

Let's Continue the Conversation

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www.bluebridgepeople.com

Scan to Connect



Connect on LinkedIn

or visit our website for more resources

Thank You for Your Time and Attention



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UP NEXT:

KEYNOTE: WAYS OF WORKING

**THRIVING IN AN AI AUGMENTED PROJECT
WORLD**
-ASHIMA SHARMA

SUMMIT 2025: Kris Jones



**COMPLETE THE SURVEY TODAY
(11/8) FOR YOUR PDUS TO BE
REPORTED FOR YOU**

**TO SELF REPORT YOUR PDUS:
PDU ID: 0106M17HT2
PDU TYPE: BUSINESS ACUMEN
GO TO PMI.ORG FOR SUBMISSION**