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# LEVERAGING GENERATIVE AI FOR ENHANCED PROJECT EFFICIENCY



**STEVEN JONES**  
**UNIVERSITY OF CINCINNATI**



**POWER SKILLS**

# HOUSEKEEPING



**Project  
Management  
Institute.**  
Southwest Ohio



**Project  
Management  
Institute.**  
Dayton/  
Miami Valley Ohio



#cincysummit25



**EACH SESSION  
IS RECORDED**



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

# AI Project Management Agent

Enhanced  
Project  
Efficiency with  
AI

# Steven H. Jones,

Managing Principal /Assistant Professor

## Professional Experience

- Managing Principal – A-S Consulting
- Asst. Professor Operations Mgmt
- Sr. Dir. of Performance Improvement at Convergys
- Sr. Improvement Mgr. (APAC & LATAM) at AtoS International
- Global Dir. of CI at Siemens IT S&S
- Global Prog. Exec. & LSSBB at Xerox

## Professional Education

- *MS Artificial Intelligence, U.C.*
- Lean Management from McKinsey
- Executive MBA, Xavier University
- International Business, Sophia University, Tokyo
- B.A. in Communications, The Univ. of Cincinnati
- Systems Thinking, Society for Organizational Learning

# GenAI Workflow Example - 2024



## **Automate repetitive data entry tasks**

Use GPT-based form fillers and structured data extractors to streamline routine workflows like invoicing, HR onboarding, or customer support



## **Summarize key insights from documents**

Train GPT models on your internal knowledge base to provide concise, relevant summaries of policies, contracts, or other critical files



## **Generate personalized communications**

Leverage GPT to draft emails, reports, and other content tailored to specific stakeholders, customers, or team members



## **Augment employee capabilities**

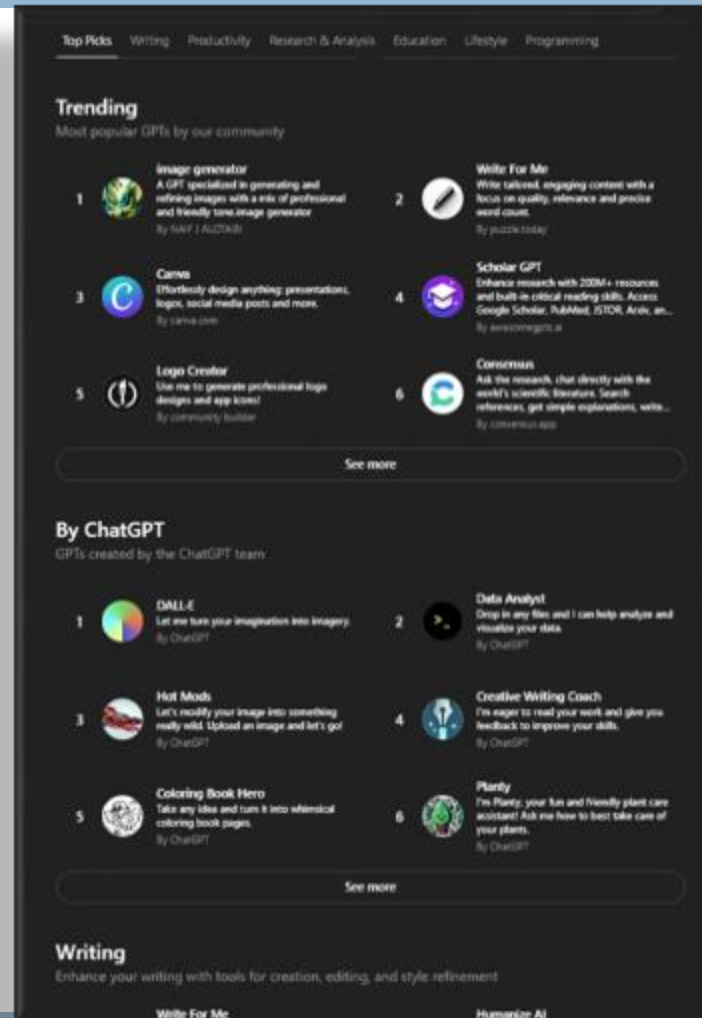
Empower subject matter experts with GPT-based virtual assistants that can handle information lookup, analysis, and first-line support

**By strategically applying GenAI to enterprise workflows, you can automate mundane tasks, enhance employee productivity, and improve customer experiences - all while maintaining appropriate controls and oversight.**

# ChatGPT 4.0

## GPT: Generative Pre-trained Transformer

- **Generative:** The model can generate new content, such as sentences, ideas, or responses, based on the input it receives.
- **Pre-trained:** The model is initially trained on a vast amount of data before it's fine-tuned for specific tasks or released to the public.
- **Transformer:** Transformers are a type of neural network architecture designed to process language more efficiently than previous models.



# Project Portfolio Development

- CVG 10k review
  - CONVERGYS CORP  
(Form: 10-K, Received: 02/21/2018 16:49:31)
  - 161 Pages

UNITED STATES  
SECURITIES AND EXCHANGE COMMISSION  
Washington, D.C. 20549

FORM 10-K

ANNUAL REPORT PURSUANT TO SECTION 13 OR 15(d) OF THE  
SECURITIES EXCHANGE ACT OF 1934

For the fiscal year ended December 31, 2017  
Commission file number 1-04379

CONVERGYS CORPORATION

As (the) ☒ U.S. Employer  
Corporation ☐ No. 33-159292

301 East Fourth Street, Cincinnati, Ohio 45202  
Telephone Number (513) 723-7888

Securities registered pursuant to Section 12(b) of the Act:

| Title of each class          | Name of each exchange on which registered |
|------------------------------|-------------------------------------------|
| Common Shares (see page 100) | New York Stock Exchange                   |

Securities registered pursuant to Section 12(g) of the Act: None

Indicate by check mark if the registrant is a well-known seasoned issuer, as defined in Rule 405 of the Securities Act. Yes ☒ No ☐

Indicate by check mark if the registrant is not required to file reports pursuant to Section 13 or Section 15(d) of the Act. Yes ☐ No ☒

Indicate by check mark whether the registrant (1) has filed all reports required to be filed by Section 13 or 15(d) of the Securities Exchange Act of 1934 during the preceding 12 months (or for such shorter period that the registrant was required to file such reports), and (2) has been subject to such filing requirements for the past 90 days. Yes ☒ No ☐

Indicate by check mark whether the registrant has submitted electronically and posted on its corporate Website, if any, every Interactive Data File required to be submitted and posted pursuant to Rule 405 of Regulation S-K (Section 201.405 of this chapter) during the preceding 12 months (or for such shorter period that the registrant was required to submit and post such files). Yes ☒ No ☐

Indicate by check mark if disclosure of delinquent filers pursuant to Item 405 of Regulation S-K (Section 201.405 of this chapter) is not contained herein, and will not be contained, in the best of registrant's knowledge, in definitive proxy or information statements incorporated by reference in Part III of this Form 10-K, or any amendment to this Form 10-K. ☐

Indicate by check mark whether the registrant is a large accelerated filer, an accelerated filer, a non-accelerated filer or a smaller reporting company. See definitions of "large accelerated filer," "accelerated filer" and "smaller reporting company" in Rule 12b-2 of the Exchange Act.

Large accelerated filer ☒ Accelerated filer ☐

Non-accelerated filer ☐ Smaller reporting company ☐ Emerging growth company ☐

If an emerging growth company, indicate by check mark if the registrant has elected not to use the extended transition period for complying with any new or revised financial accounting standards provided pursuant to Section 13(a) of the Exchange Act. ☐

Indicate by check mark whether the registrant is a shell company (as defined in Rule 12b-2 of the Exchange Act). Yes ☐ No ☒

The aggregate market value of the voting shares held by non-affiliates of the registrant was \$2,234,280,540, computed by reference to the closing sale price of the stock on the New York Stock Exchange on June 30, 2017, the last business day of the registrant's most recently completed second fiscal quarter.

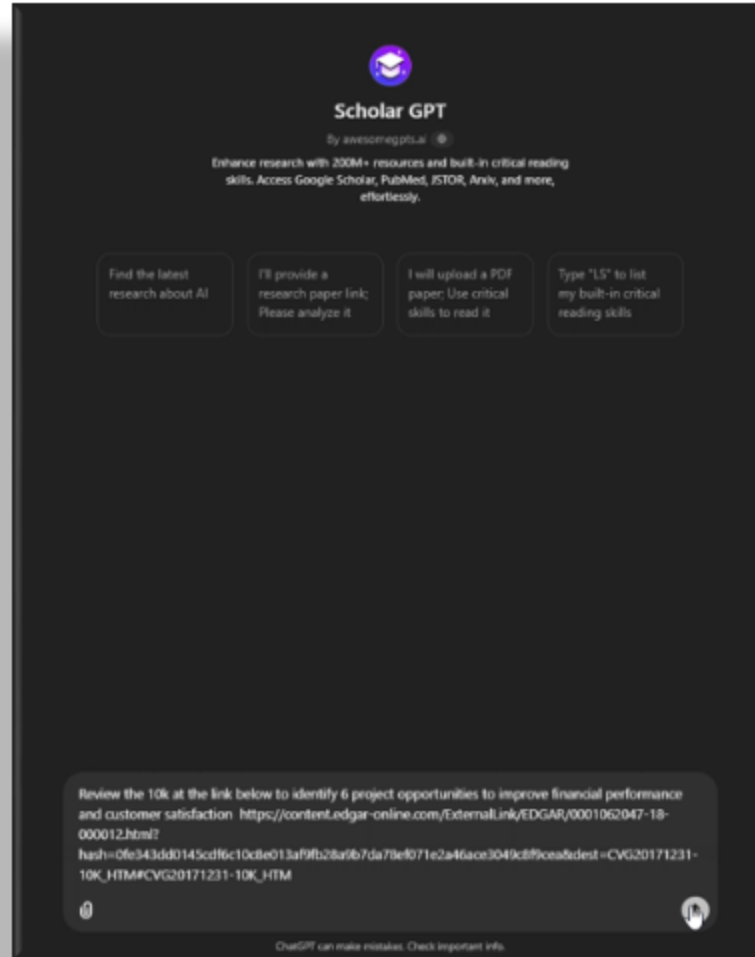
As January 31, 2018, there were 91,615,407 common shares outstanding, excluding amounts held in treasury of 270,888.

DOCUMENTS INCORPORATED BY REFERENCE

Portions of the registrant's definitive proxy statement for the Annual Meeting of Shareholders to be held on April 20, 2018 are incorporated by reference into Part III of this report.

# Project Portfolio Development

- CVG 10k review
- Prompts
  - Review the 10k at the following link to identify 6 project opportunities to improve financial performance and customer satisfaction



# What's Next in Enterprise GenAI

Automated Workflows

Context-Aware  
Assistants

Personalized Recommendations

Proactive Decision Support

# What is an AI Agent?



## **Autonomous Decision-Maker**

An AI agent is a software system that can perceive its environment, make decisions, and take actions to achieve its goals.



## **Adaptable and Dynamic**

AI agents can adapt their behavior and strategies based on changing environmental conditions and new information.



## **Intelligent Reasoning**

AI agents use advanced algorithms and machine learning techniques to analyze data, identify patterns, and make rational decisions.



## **Goal-Oriented Behavior**

AI agents are designed to pursue specific objectives or goals, and they take actions to maximize the likelihood of achieving those goals.

In summary, an AI agent is a sophisticated software system that can perceive, reason, adapt, and make decisions to accomplish its intended objectives. These intelligent agents are at the forefront of advancements in artificial intelligence and are transforming various industries and domains.

# What is RAG?



## **Combining AI's built-in training with external facts**

RAG gives AI access to additional information beyond its original training, like a lookup tool before answering



## **Overcoming limitations of standard AI models**

Standard AI models are 'frozen in time' and can't access new information post-training, RAG fixes this with real-time lookups



## **Key benefits of RAG**

Accurate answers, up-to-date responses, transparent with sources, and cheaper than retraining the model

**RAG is a game-changing approach that makes AI smarter by combining its built-in knowledge with dynamic access to external information, leading to more reliable and up-to-date responses.**

# What Is a RAG Agent?



## **Task-oriented assistant**

Offers technical guidance, storytelling coaching, risk analysis to support architects



## **Has memory and context**

Draws upon enterprise data sources to provide grounded, transparent responses



## **Supports decision-making**

Can justify recommendations and actions, not just have conversations



## **Acts autonomously or in support of a role**

Functions as an intelligent coworker, not just a chatbot

**RAG AI agents are specialized, data-driven assistants that enhance workflows and decision-making for enterprise roles.**

# Core Components of RAG



## **Retriever**

Finds useful information from external or internal sources



## **Generator**

Writes the final answer by combining retrieved info and model knowledge



## **Integration**

Connects the retriever and generator to work seamlessly together

These three core components work in sync to make RAG systems powerful and effective.



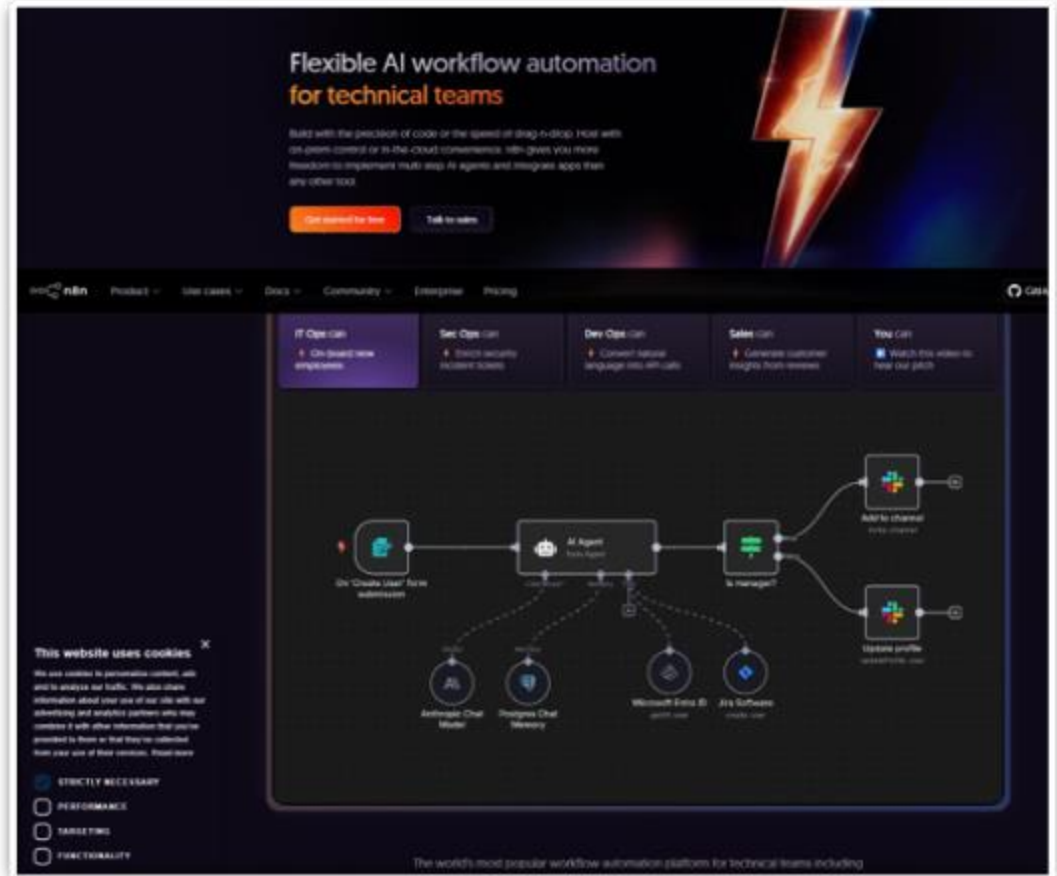
# Future of Agentic Automation

The future of workflow automation lies in the emergence of agentic AI systems. These autonomous, goal-driven agents can dynamically plan, execute, and adapt their actions to achieve complex tasks, blending the capabilities of large language models with external tool integrations.

# n8n AI Agent



- What is n8n
- n8n AI Agent provides a front end for user queries.
- It connects to a pinecone database sources from a single data repository.

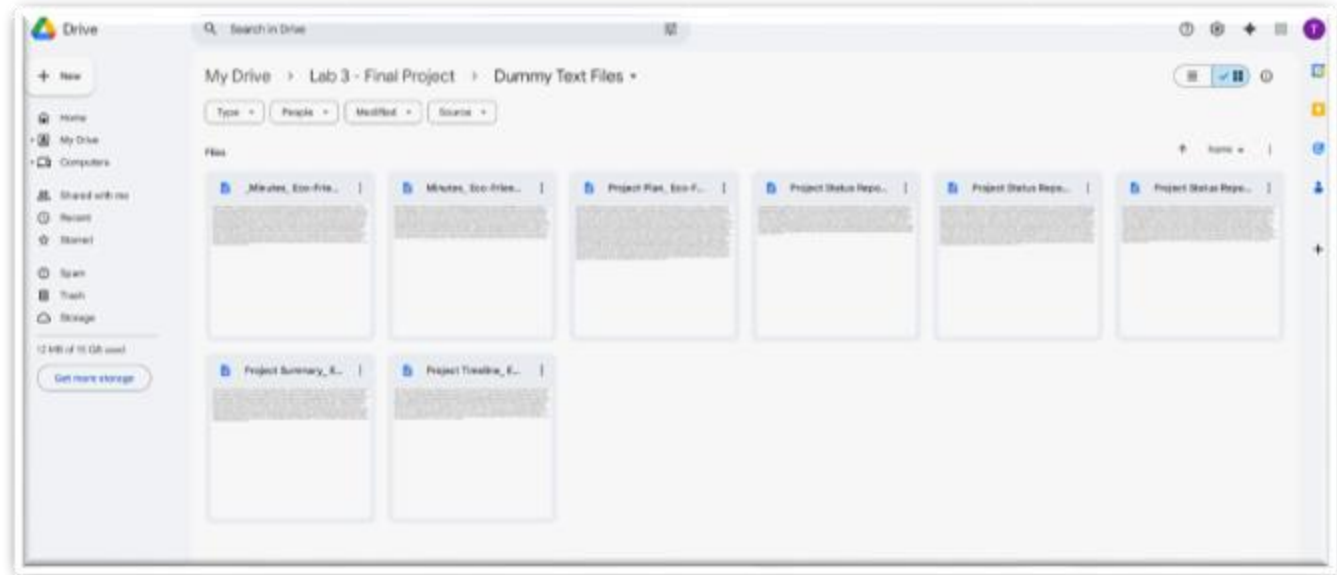


# AI Agent Document Repository

Repository of project artifacts:

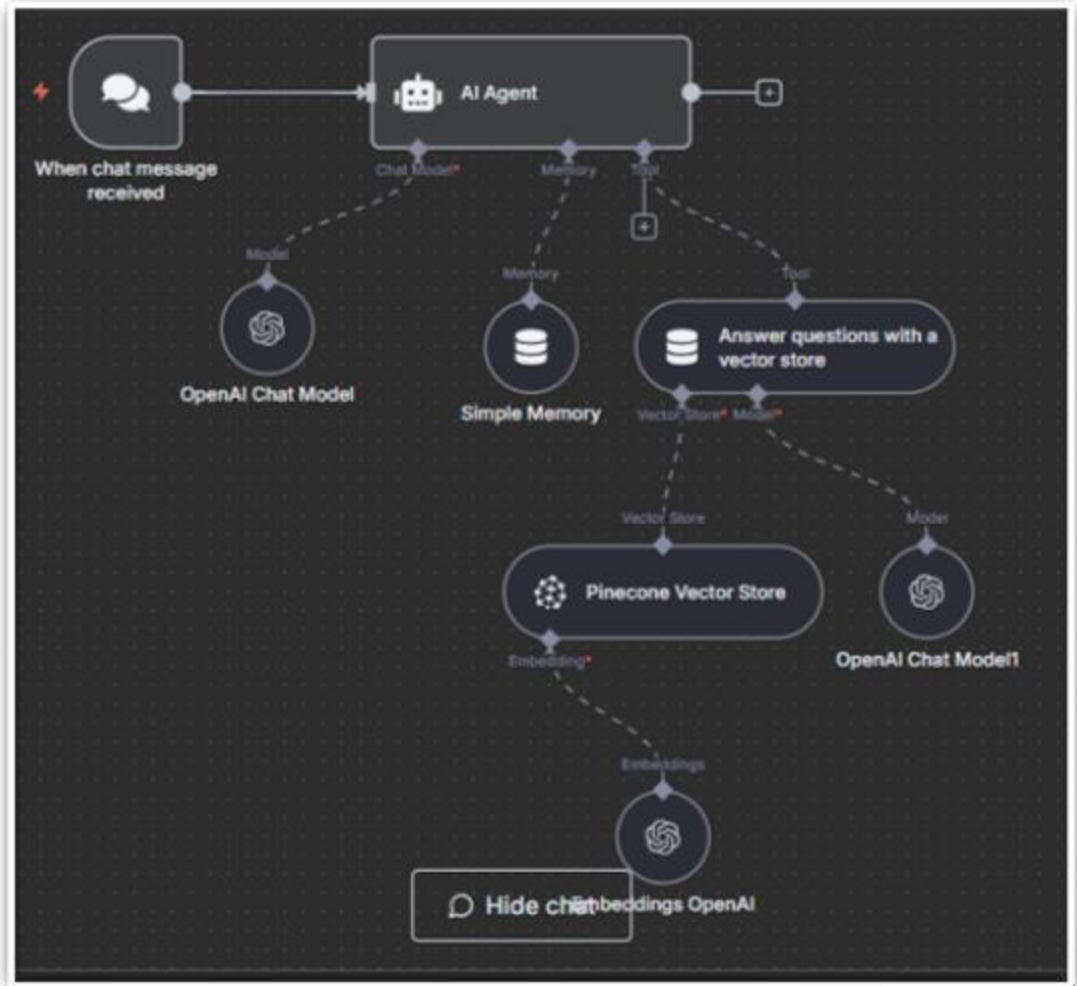
- Meeting Minutes
- Project Plans
- Project Charter
- Risk Registers
- Lessons Learned
- Change Logs

Stored as text or csv files.



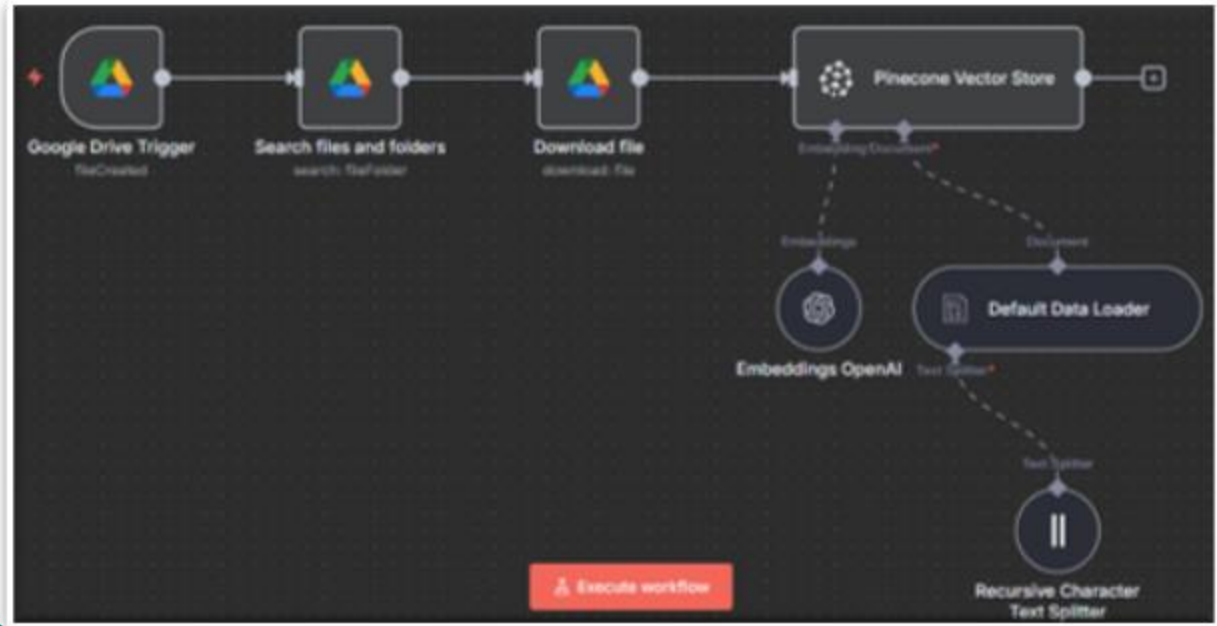
# n8n AI Agent

- n8n AI Agent provides a front end for user queries.
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# n8n AI Knowledge Base

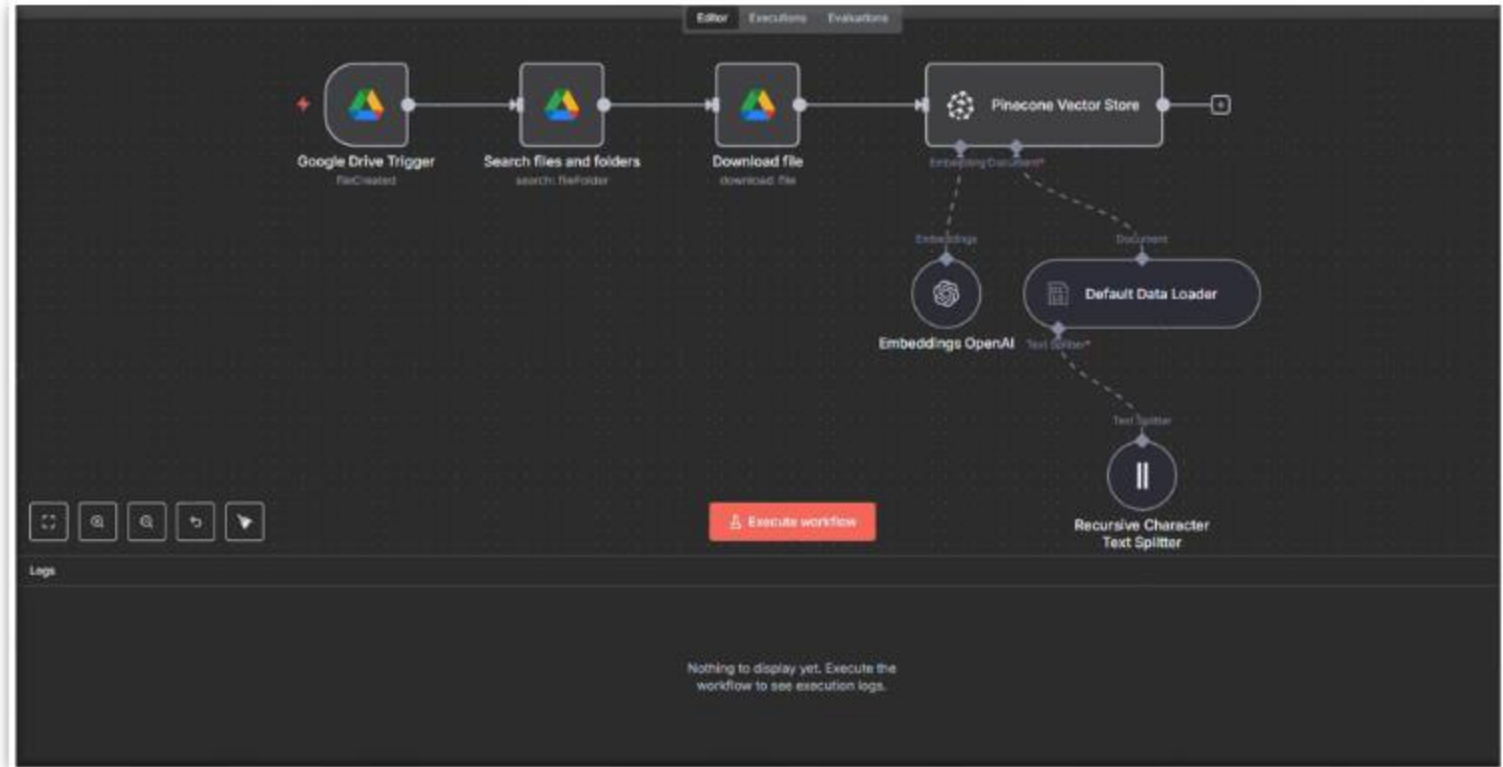
- n8n AI Knowledge Base searches predetermined files and folders and downloads them into the Pinecone Vector Store.



# n8n AI Agent



# n8n AI Knowledge Base



# AI Project Management Agent

Meet *Mercury*, my AI Agent & Assistant PM

*Mercury* is a smart, useful, and realistic AI-powered solution that helps manage or support managing timelines, automating team updates, monitoring risks, and summarizing meetings.

*Mercury* helps us with...

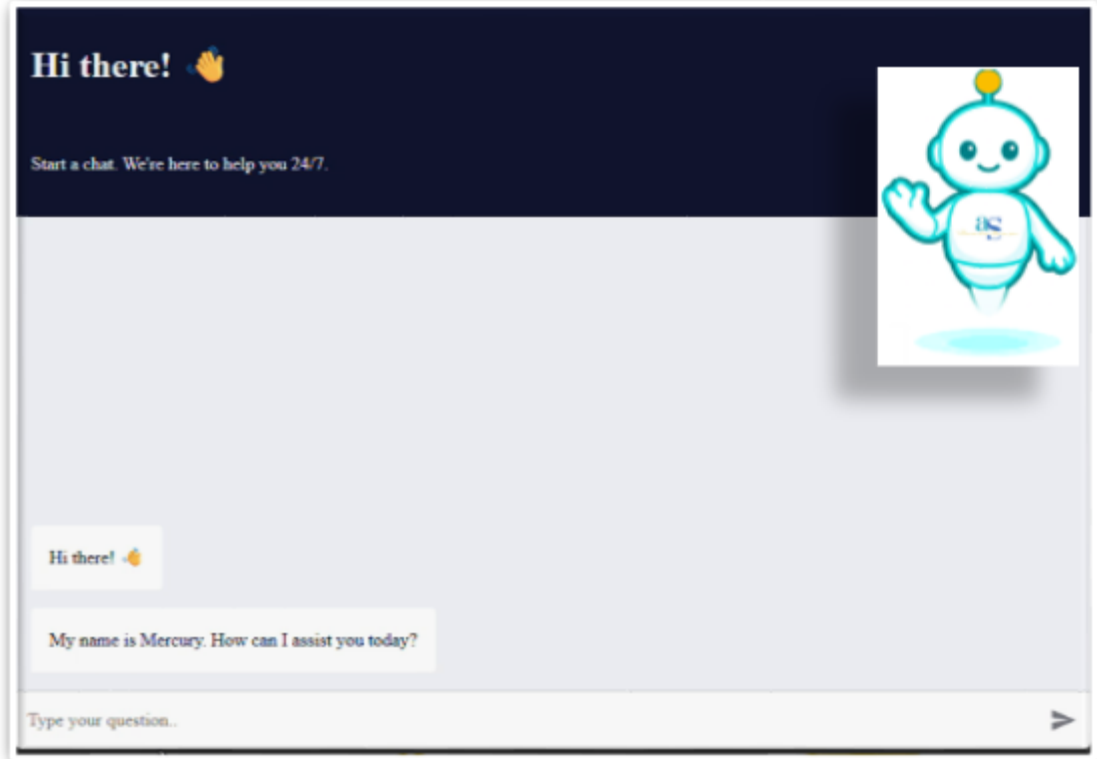
1. Common Stakeholder Questions
2. Project Status Summaries



# AI Project Management Agent

Ask **Mercury:**

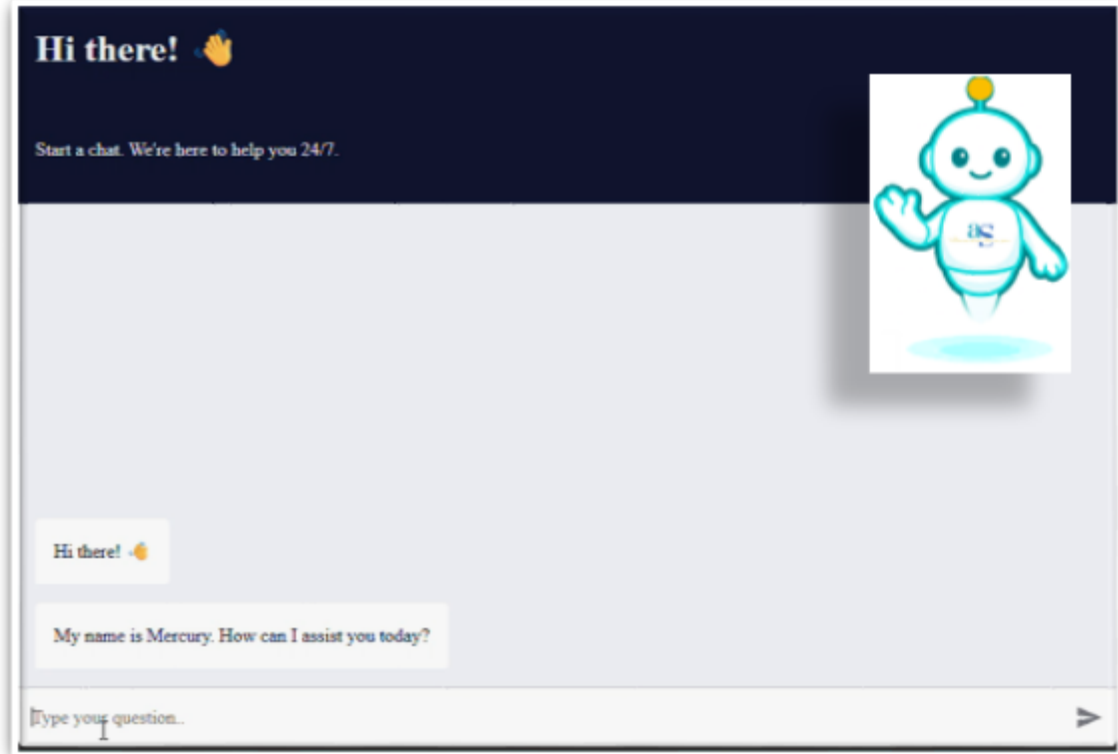
- who is managing the project?



# AI Project Management Agent

Ask **Mercury:**

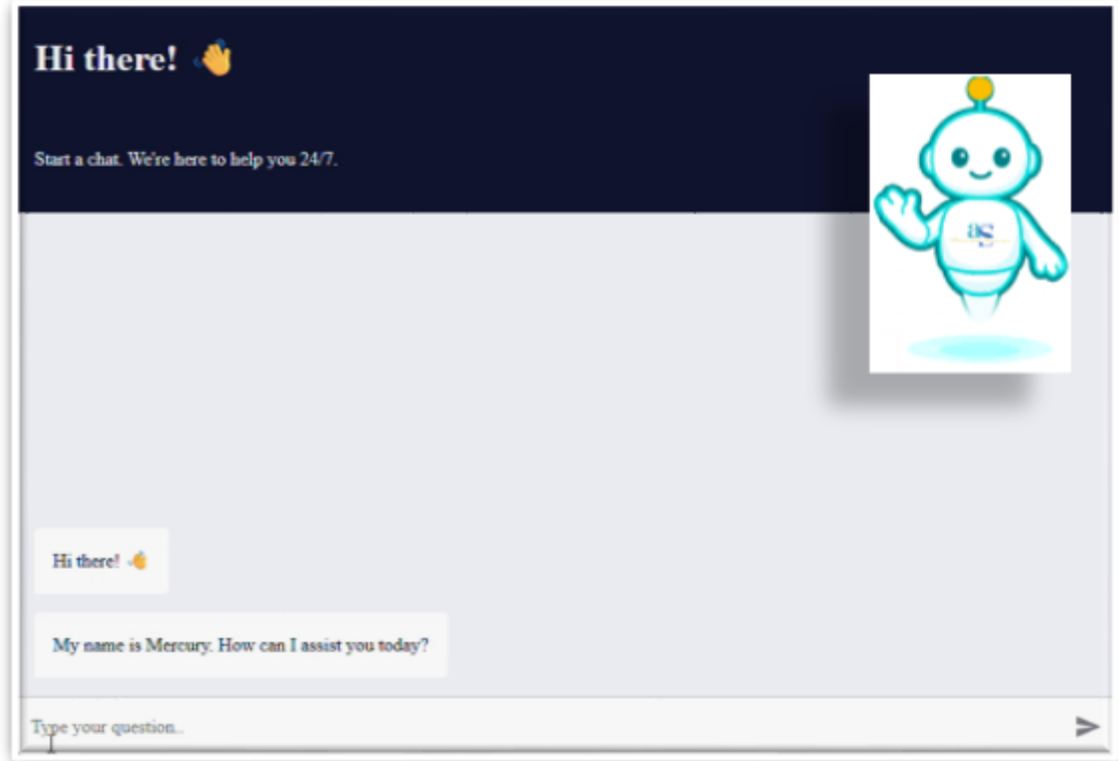
- who is on the project team?
- what roles do they play?



# AI Project Management Agent

Ask **Mercury:**

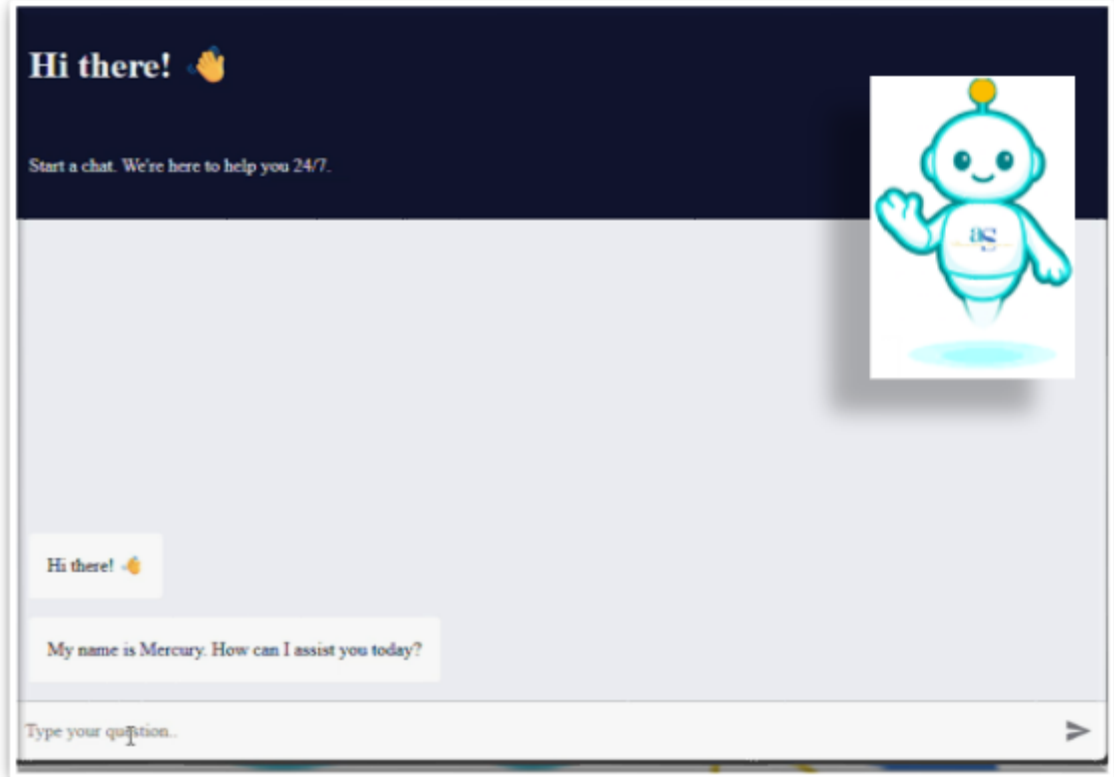
- about the nature and goal of the project.



# AI Project Management Agent

Ask **Mercury**:

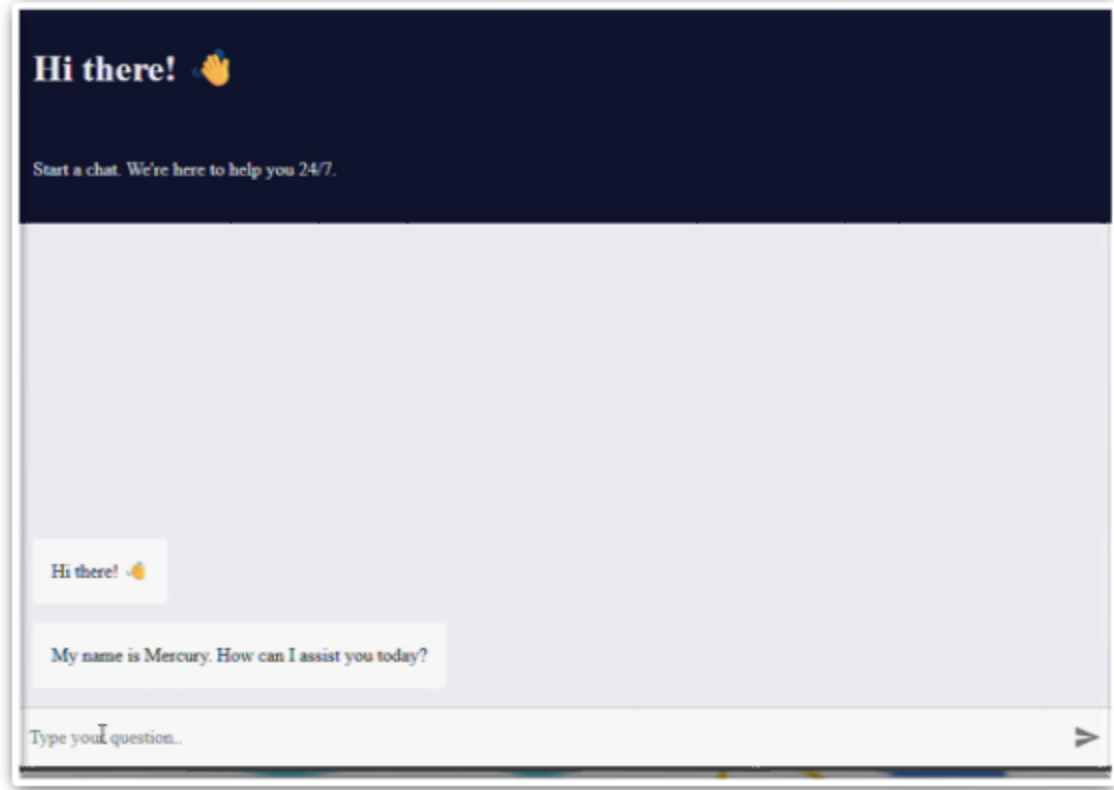
- about Project status?



# AI Project Management Agent

Ask **Mercury**:

- about Risk reduction actions?



# Key Takeaways



## **GenAI adoption is strategic, not just technical**

GenAI is transforming how enterprises operate, reshaping products, roles, and markets



## **Winning firms combine governance with innovation**

Enterprises need to balance responsible AI practices with agile deployment to drive value



## **Human-AI collaboration is the new productivity frontier**

Leading organizations are empowering employees with intelligent assistants to augment knowledge work

**Enterprises that strategically embrace GenAI while ensuring trust and responsibility will gain a competitive edge in the AI-powered future.**

# Final Thoughts



## **RAG is about making AI smarter**

Combines AI's built-in knowledge with external facts to provide more accurate and up-to-date responses



## **Reduces hallucinations**

By retrieving relevant information, RAG helps AI avoid generating unreliable or nonsensical responses



## **Easier updates, lower costs**

RAG allows AI systems to be updated with new information without the need for costly retraining



## **The future = smaller, faster RAG for everyone**

As RAG technology improves, it will become more accessible and integrated into everyday AI applications

**The next wave of AI isn't just about making models bigger—it's about making them smarter by connecting them to the right info.**

# Steven H. Jones

Operational Excellence Leader

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[alexanderstevensonllc@gmail.com](mailto:alexanderstevensonllc@gmail.com)



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# UP NEXT:

## TRACK 1: BUSINESS ACUMEN

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

-KRIS JONES

## TRACK 2: WAYS OF WORKING

PROJECT MANAGING THROUGH THE CYBERSTORM

-ELIZABETH LAFORCE & LISA SHIVERS

## TRACK 3: POWER SKILLS

HOW TO ETHICALLY MANAGE AI

-ERIC FRAYER

SUMMIT 2025: Steven Jones



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

TO SELF REPORT YOUR PDUS:

PDU ID: 0106ENGTUU

PDU TYPE: POWER SKILLS

GO TO PMI.ORG FOR SUBMISSION