

# AI Agents for Project Managers: From Awareness to Application

# AI Agents

in a Business

Ecosystem

April 9, 2026

Mike Lively  
Michelle Morrison



*Describe the business value and how things have changed*

*Explain a bot vs automation vs AI agent*

*Discuss AI maturity and readiness*

*Discover how to position yourself as a leader*

# What we will cover today



# Mike Lively

Founder QuantumAI

Trainer, IT Evangelist, Developer

@mikelively-quantumai



16 Azure Cloud Certs

## About Me

- Father of Nine, USAF
- Working on a PhD in GenAI
- Teaching AI for Johns Hopkins & GK & Texas A&M
- Avid Hacker & Prompt Engineer
- 40 years programming, Keynote
- Flautist
- YMCA Gym Rat



# Michelle Morrison

Founder **CultureTiming**

People, Culture & Change Leader



CULTURE  
TIMING

[www.culturetiming.com](http://www.culturetiming.com)

## About Me

- Innovator and creative thinker
- Mom of 4 girls
- AI literacy advocate
- 24 years at a Big 4
- Social activist










# AI Infused Design Thinking at Mason HS



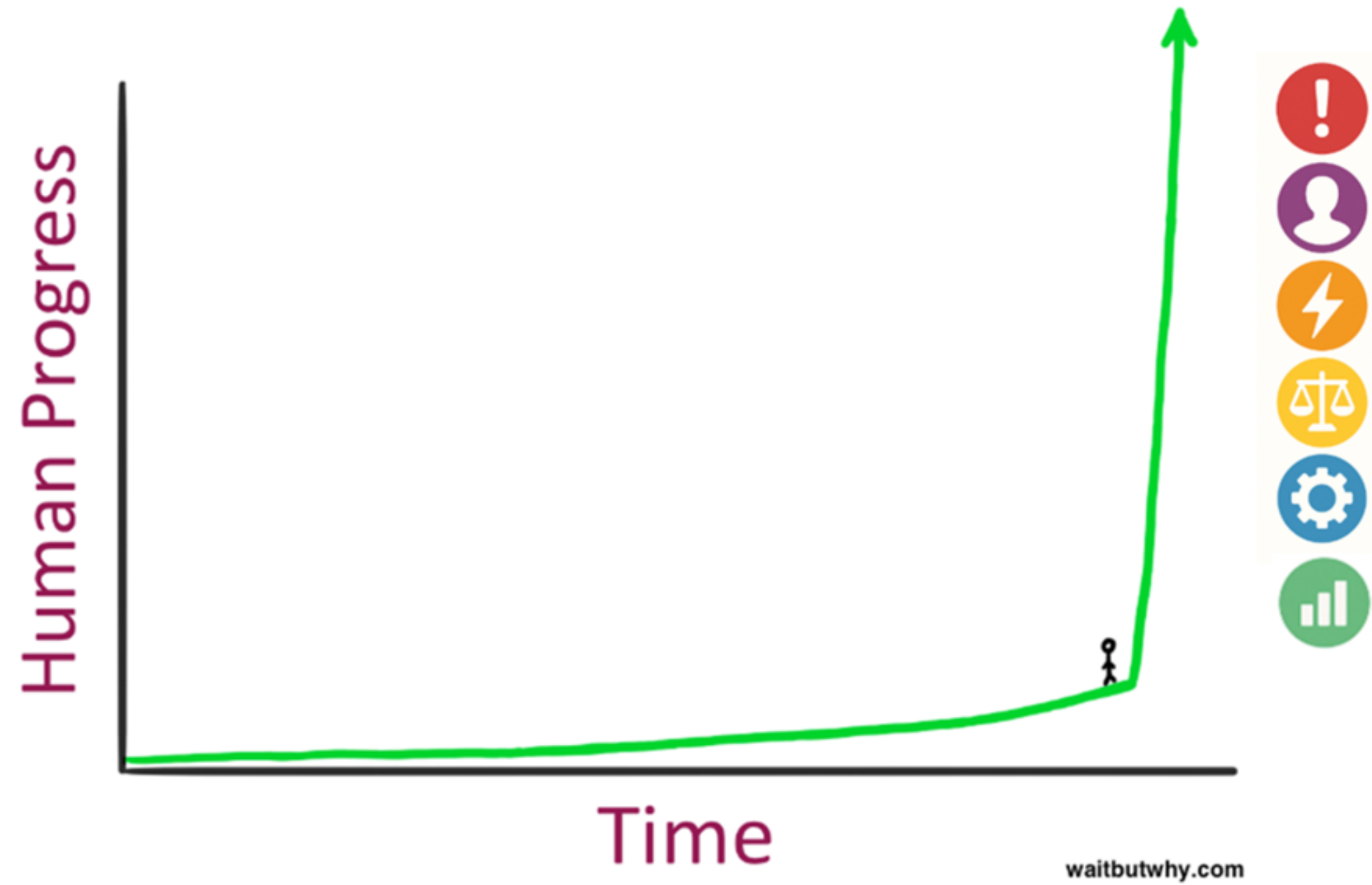


# Ice Breaker

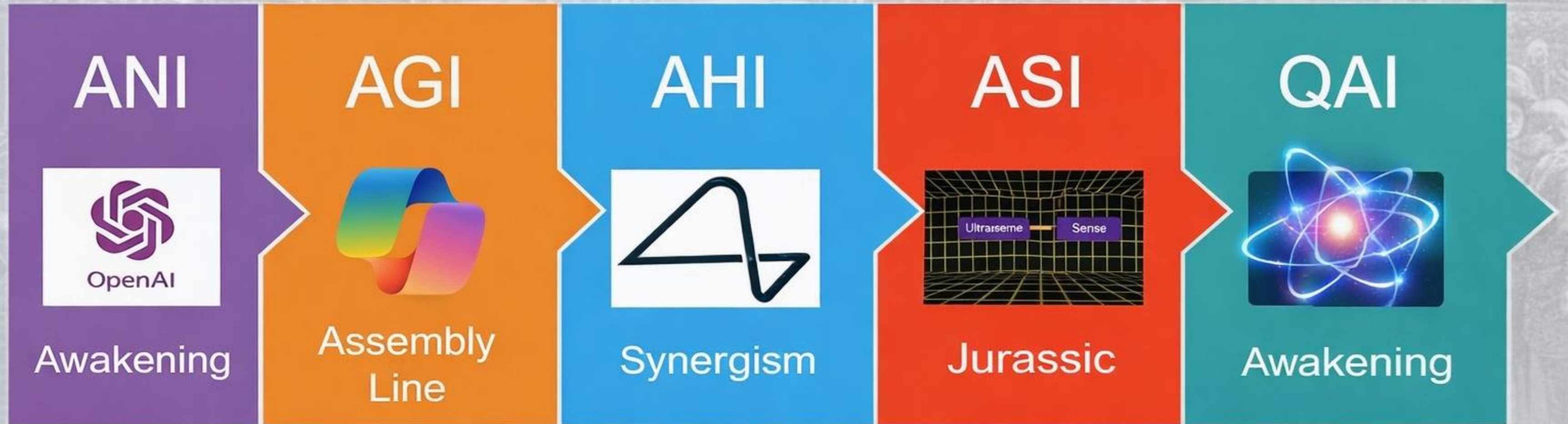
Imagine a world where superintelligent systems make complex decisions entirely on their own—no humans in the loop. Which of the following outcomes would you most associate with that scenario?

- A  **Perfectly optimized resource allocation**
- B  **Elimination of bureaucratic bottlenecks**
- C  **Objective, bias-free policymaking**
- D  **Lightning-fast global crisis response**
- E  **Erosion of human skills and agency**
- F  **Mass unemployment and social destabilization**
- G  **Unchecked AI actions with existential risk**

# Taking Humans out of the Loop



# Taking Humans out of the Loop



**2030**

# ***Describe the business value and how things have changed***

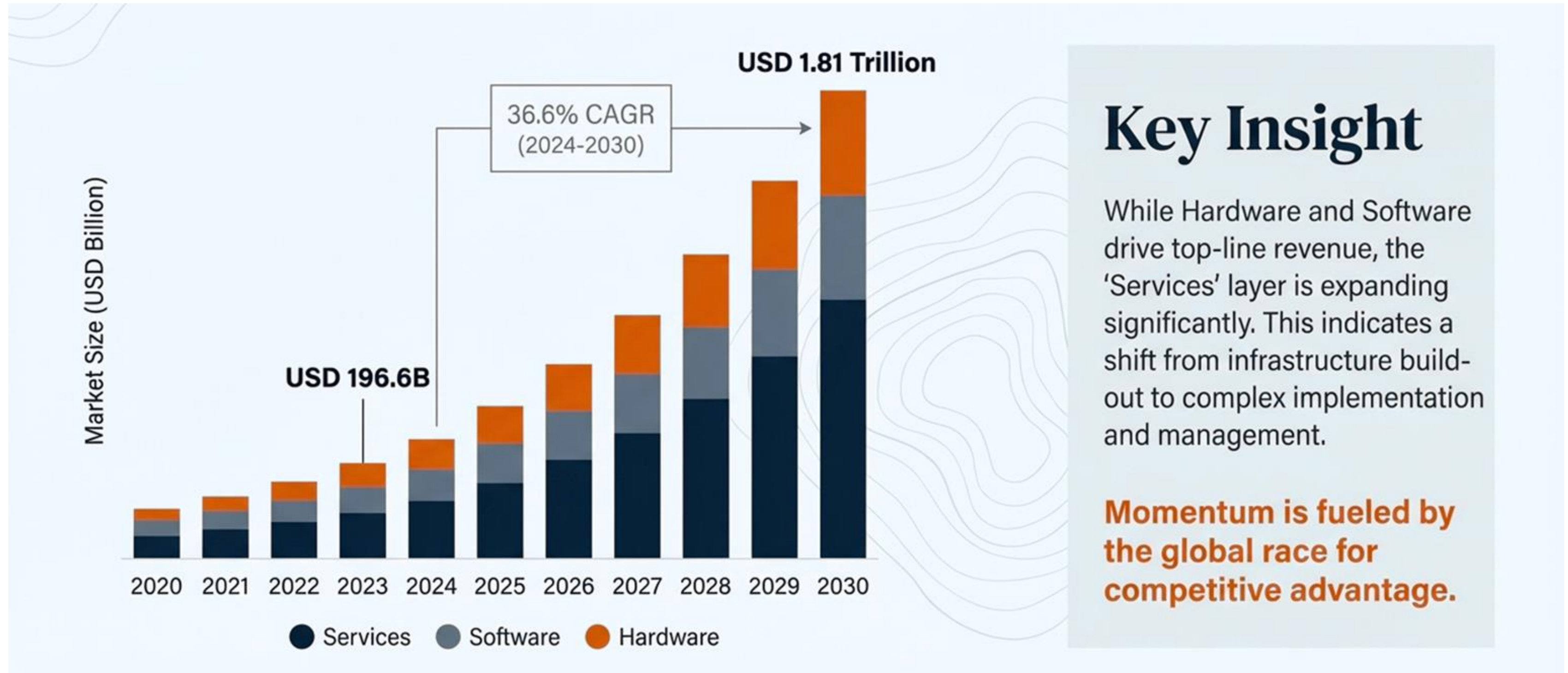
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# AI Investment is Accelerating Across all Sectors



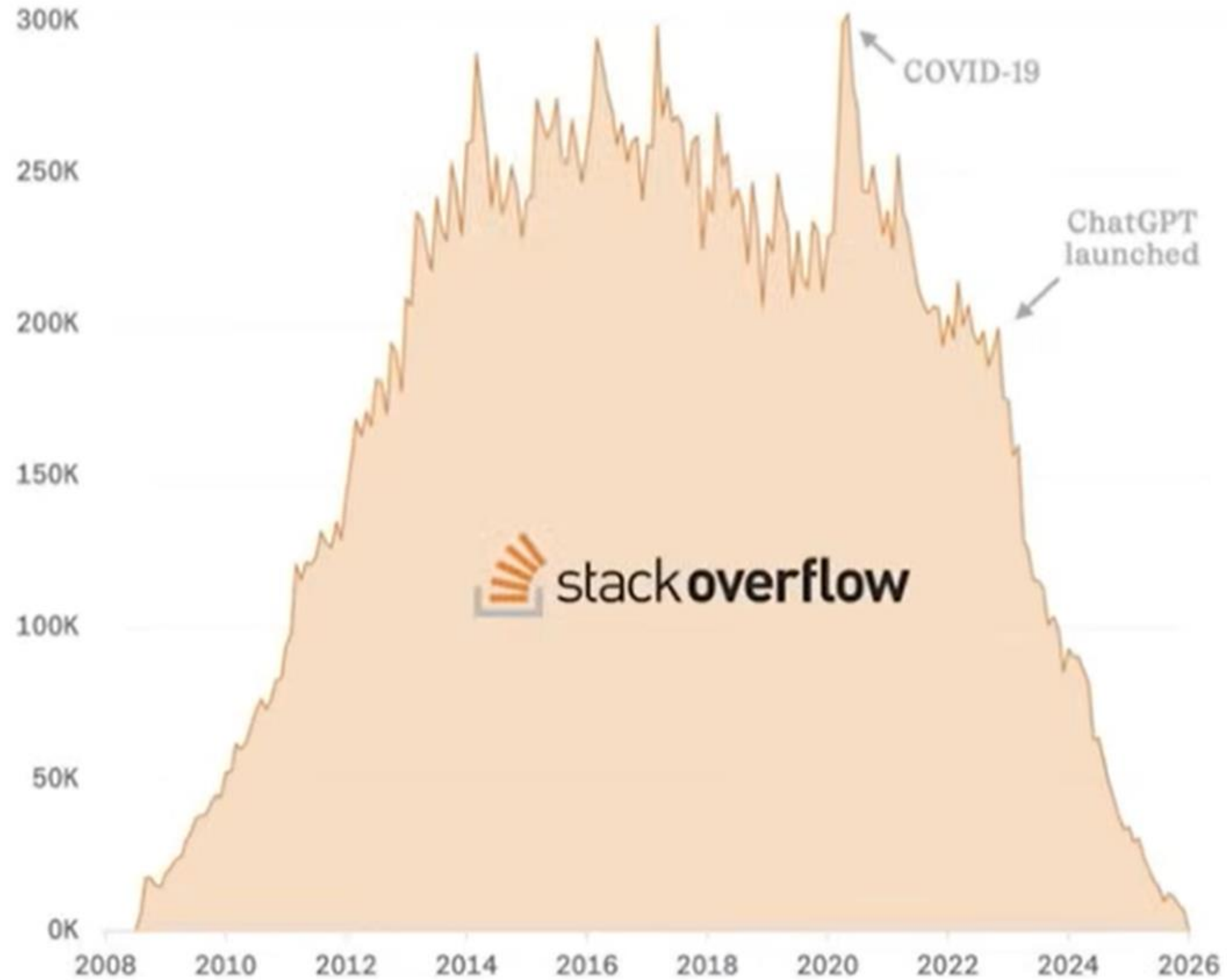
## Key Insight

While Hardware and Software drive top-line revenue, the 'Services' layer is expanding significantly. This indicates a shift from infrastructure build-out to complex implementation and management.

**Momentum is fueled by the global race for competitive advantage.**

# How Did We Get Here?

Number Of Questions Asked [Monthly, including deleted questions]



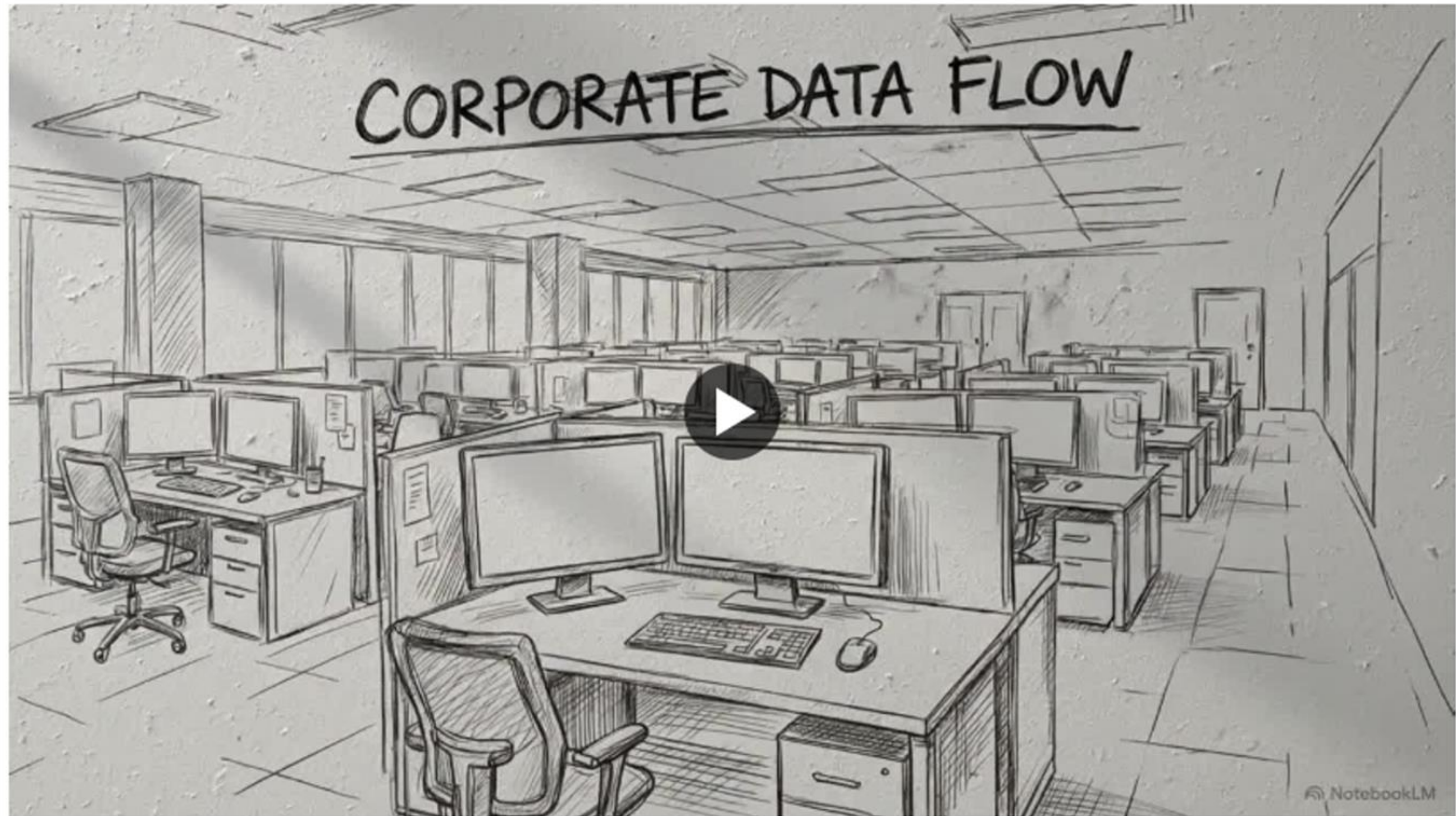
# All Software will be AI Native (SaaS is dead)



**Microsoft CEO's Shocking Prediction: "Agents Will Replace ALL Software"**

<https://www.youtube.com/watch?v=uGOLYz2pgr8>

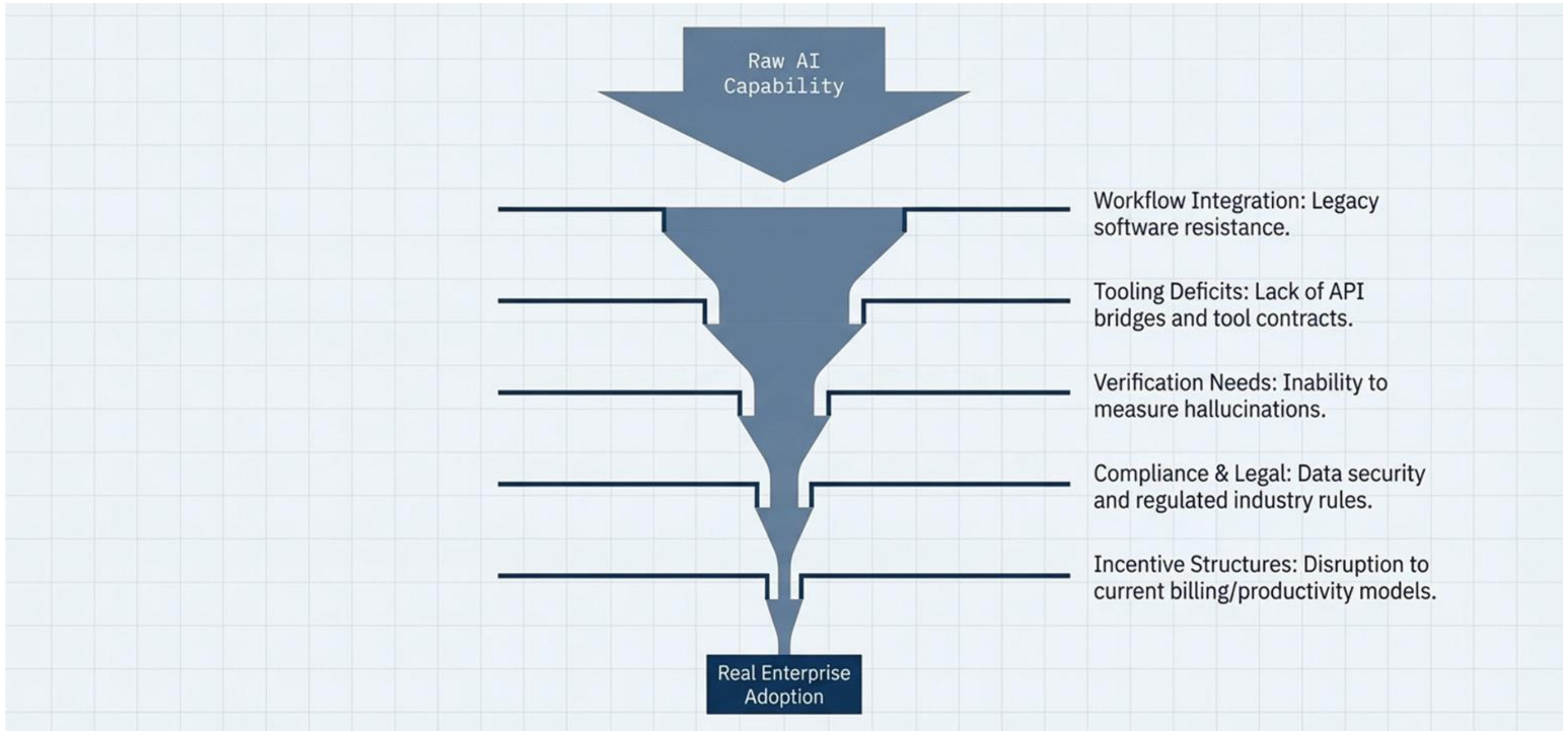
# Value Flip



<https://www.linkedin.com/pulse/ai-maturity-under-construction-until-1232026-8am-michael-lively-q9bce/>

<https://www.linkedin.com/pulse/from-invention-profit-hidden-lag-transformative-what-means-lively-qoqge/>

# The AI Capability-Adoption Gap

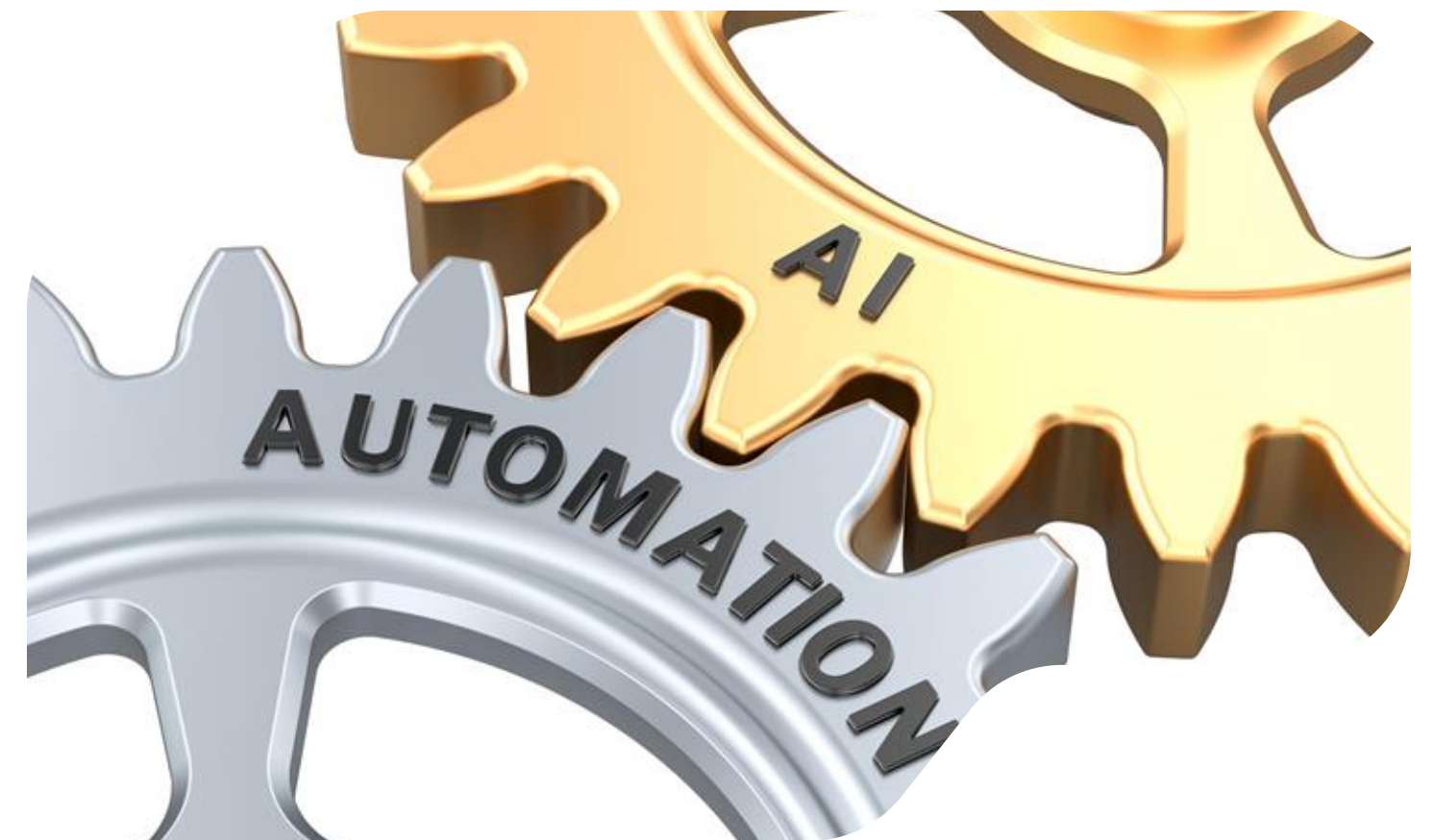


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***Automation (Rule-based execution)***

No thinking - just doing exactly what it's told.

Automation → Every Friday at 3 PM, a report is auto-created in MS Project and emailed to you

***Bot/Assistant***

Can “interact,” but mostly follows a set script or rules

Bot → Chat bot for tech support

***AI Agent (Goal-driven, adaptive problem solver)***

Thinks, learns, and adjusts—not just follows rules.

AI Agent → A proactive project manager helping run the project

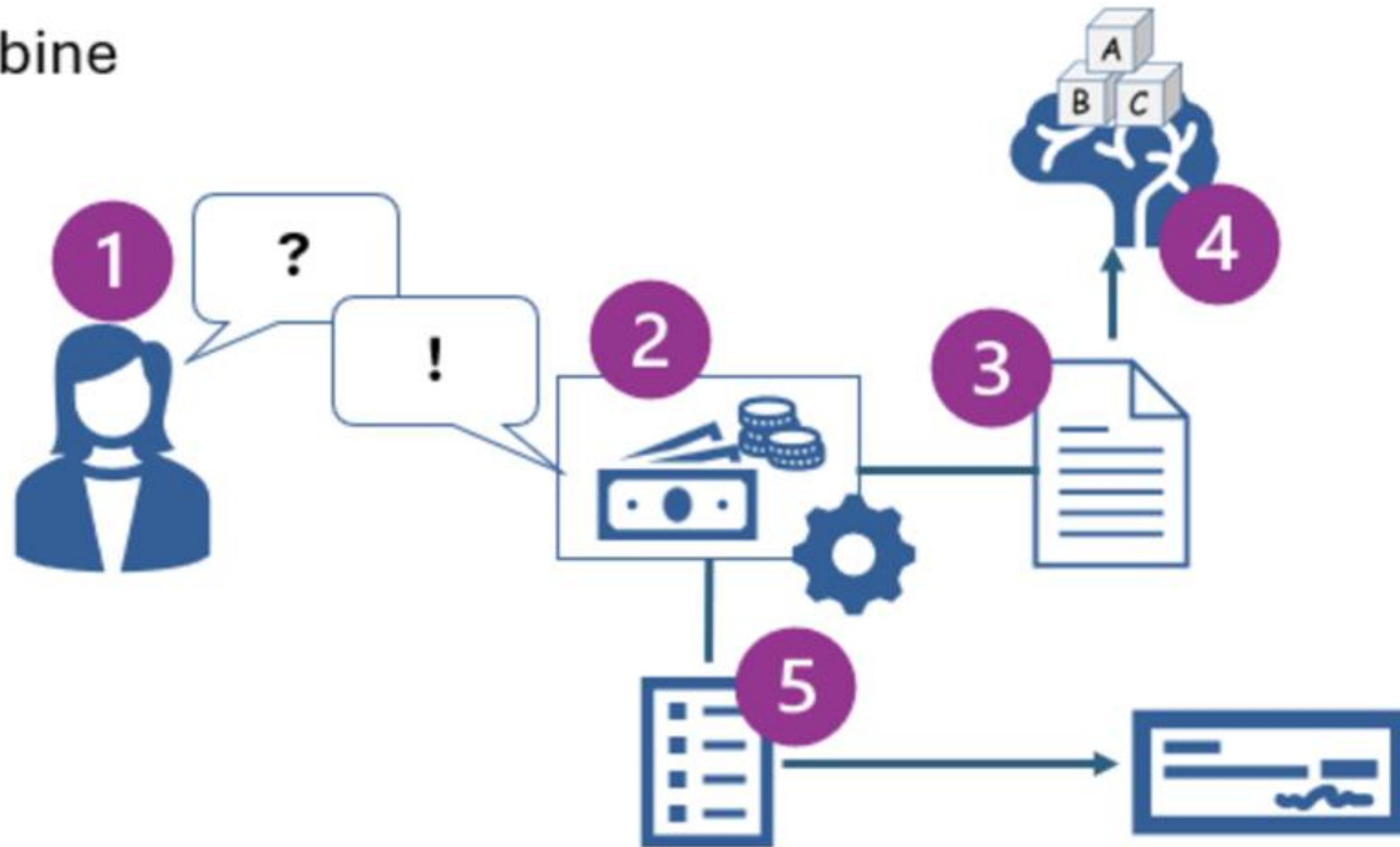


# AI Agents

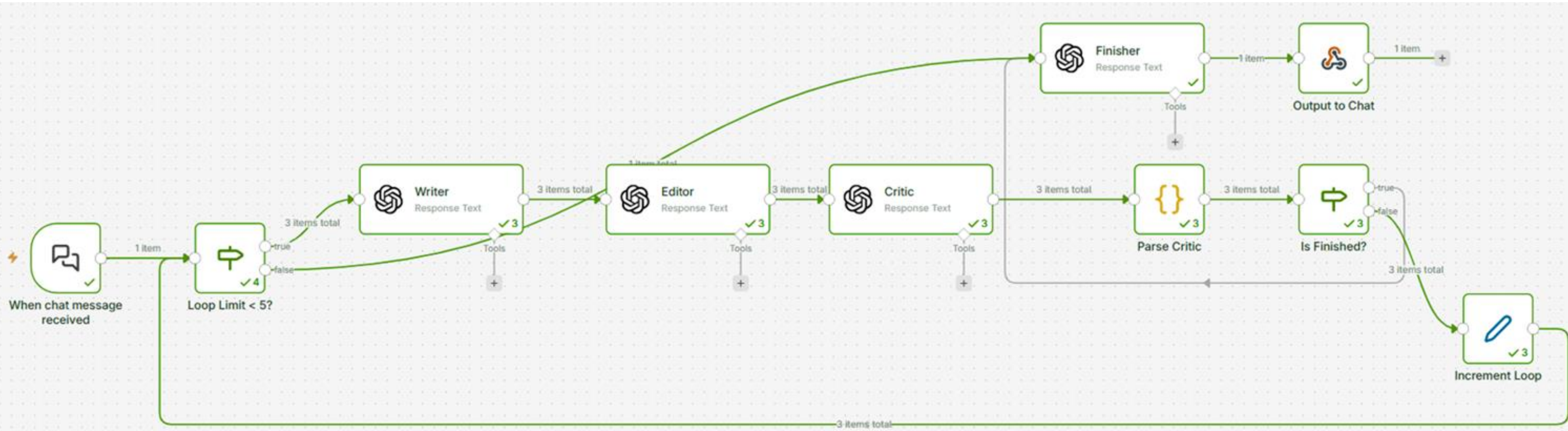
What are AI agents?

Smart software services that combine

- Generative AI models
- Contextual knowledge
- Tools to automate tasks



# Looping n8n Story: Demo



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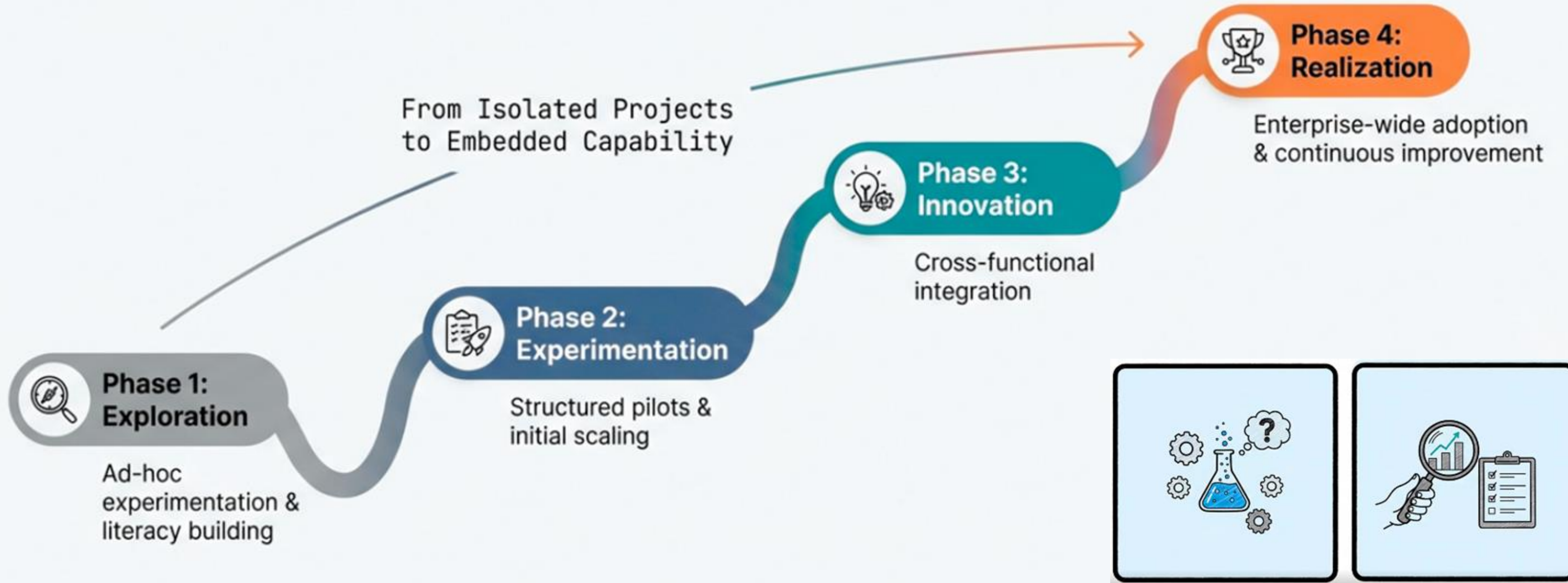
*Discover how to position yourself as a leader*



# Business Ecosystem



# The Trajectory: Four Phases of Maturity



## LEADERSHIP INSIGHT

Recognizing your current phase is critical. Strategies that work in 'Exploration' will fail in 'Realization.' Leadership must adapt tactics to the maturity stage.

# The Trajectory: Four Phases of Maturity

AI Project Realization Council ▾



## AI Project Realization Council

By Michael L Lively 👤

Bring your AI idea, prototype, or system. This tool tells you what stage you're in, what's broken, and exactly what to do next to get to production and real value—no fluff, just execution.

Run a full council review on my AI project and tell m...

Is this AI idea worth pursuing or should I pivot?

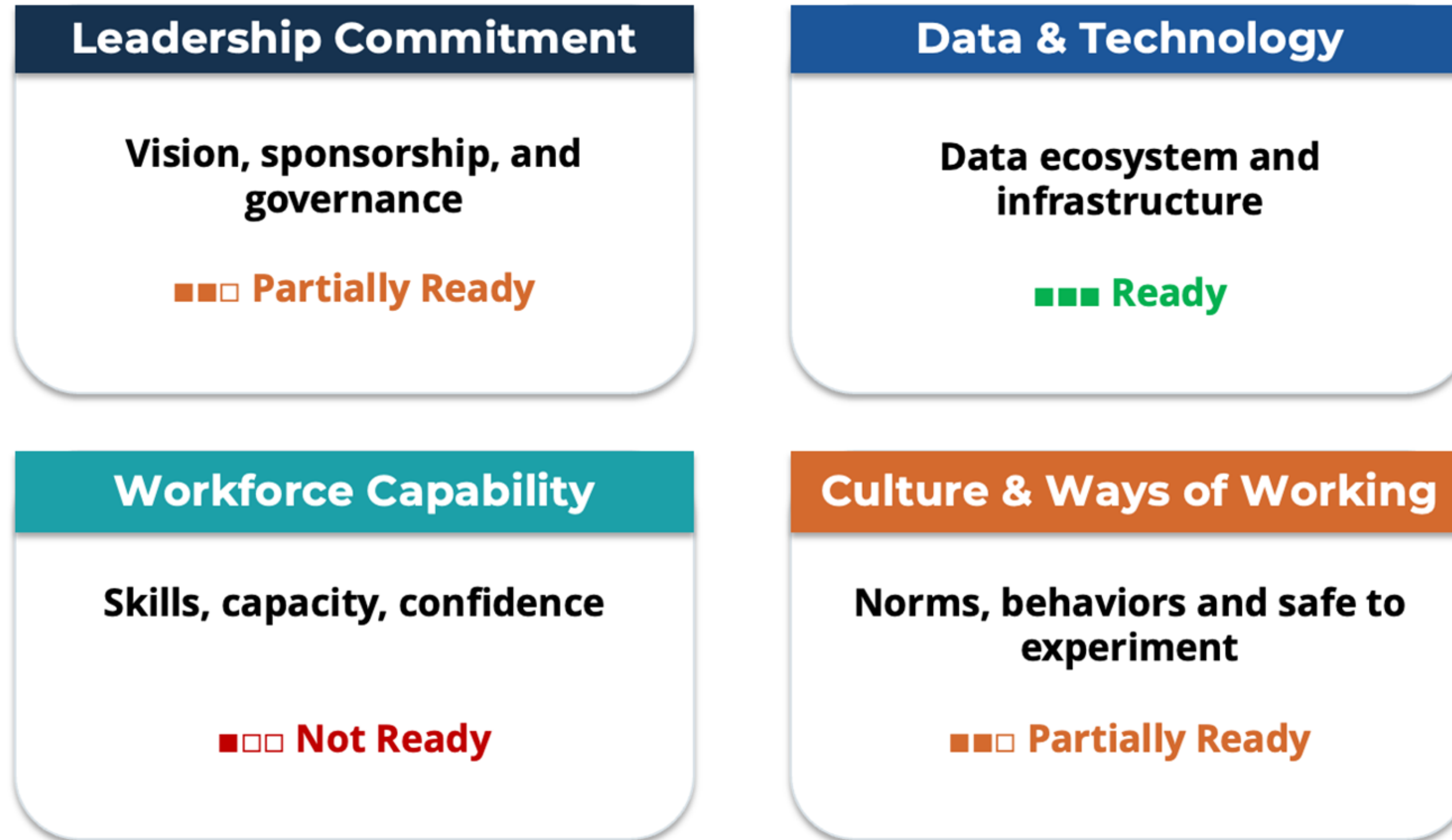
What's missing to take this from a prototype to...

If this fails, why will it fail?

### Case Example: FP&A Director as AI Change Agent (Demand & Revenue Forecasting)

- **Situation:** A mid-size retailer had inconsistent demand forecasts across regions, frequent “last-minute” inventory transfers, and low trust in analytics because each team used different spreadsheet logic.
- **Finance leader’s move:** The **FP&A Director** sponsored an AI-based forecasting initiative, positioning it as a **business decision upgrade** (not a data science experiment). She tied the work to two KPIs everyone cared about: stockouts and margin leakage.
- **Cross-functional alignment:** She formed a working group with **Supply Chain, Sales Ops, Merchandising, and Data/IT** and set a weekly “forecast decision review” cadence. Each function owned a piece of the workflow (inputs, assumptions, approvals), so the model wasn’t seen as “Finance forcing a tool.”
- **Ethics and transparency:** She required “explainability-by-default” deliverables:
  - clear drivers (promotions, seasonality, regional events),
  - documented data sources and exclusions,
  - bias checks (e.g., whether certain regions were systematically under-forecast),
  - a simple confidence score and escalation rules for human override.
- **Outcome:** Within one quarter, the company reduced forecast error meaningfully, improved inventory positioning, and shortened forecast cycle time. More importantly, leaders stopped debating whose spreadsheet was right and started debating **business actions** (promotion timing, replenishment, pricing), using a shared forecasting foundation.

# AI Maturity & Readiness Check



AI readiness is determined by four interconnected drivers—weakness in any slows adoption. Adoption becomes real when all four move together

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# Culture is the multiplier

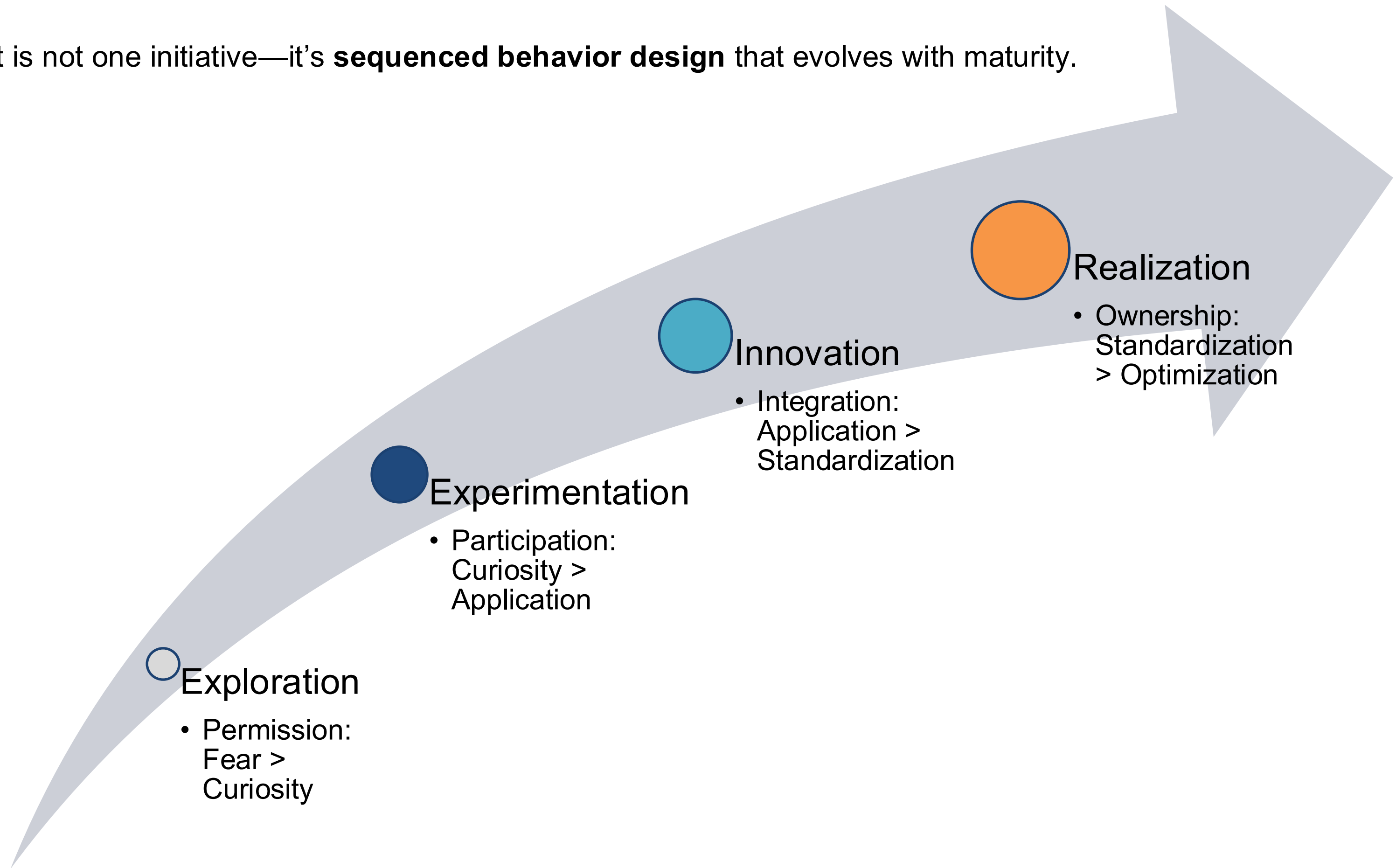
“Technology, Data, and Governance enable AI—but **People determine whether it actually works.**”

Culture is the multiplier across the business ecosystem”

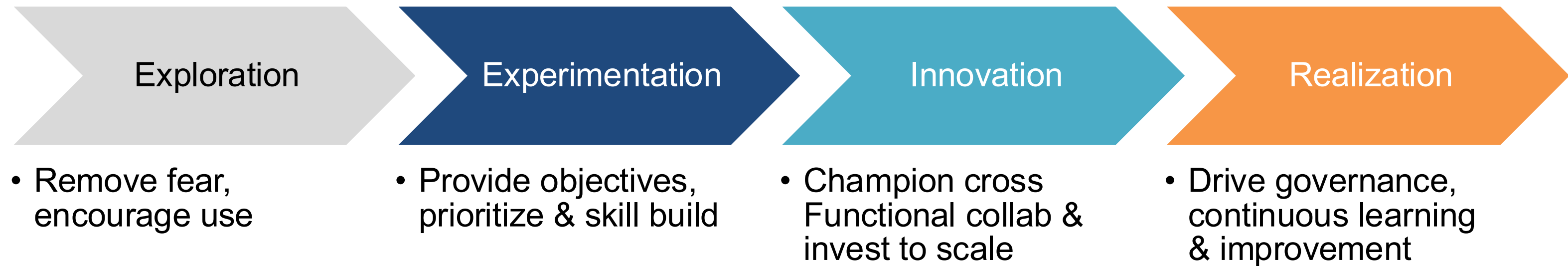


# Aligning Culture at each phase

Culture alignment is not one initiative—it's **sequenced behavior design** that evolves with maturity.



# Leadership Posture



## Weak leaders:

- Stay in the same mode across all phases
- (e.g., still “encouraging experimentation” in Phase 3)

## Effective leaders:

- Adapt their role as maturity evolves

# Case Study: AI-Enabled Workforce Planning in Healthcare

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## **Issues**

- High turnover in critical roles
- Reactive HR data (too late)
- Costly agency staffing + burnout

## **Actions**

- Introduced AI for early risk detection (retention-focused)
- Set weekly + monthly workforce reviews with clear owners
- Built trust with guardrails (no discipline use, human oversight, bias audits)

## **Impact**

- Proactive staffing decisions
- Reduced vacancies + improved retention actions
- Increased trust through transparency

# Activity

**Prompt:** write a prompt that will generate a single page comic strip, given typical size and create anima style characters that save the world from a notorious alien invader.

Create a single-page comic strip in typical comic dimensions featuring dynamic anime-style heroes who work together to save the world from a notorious alien invader, using bold panels, expressive character poses, and clear visual storytelling.

Demonstrate editing!

ChatGPT



Copilot



# Nature vs. Nurture: A New Framework for Workplace Behavior



Do you know your Nature, Nurture, Adaptation Costs and Impact on Others?



**Take the assessment >**  
<https://nature-nurture-compass-b34a2262.base44.app/>  
**Then complete the tester form here >**  
<https://forms.gle/wERD6VUtQDVhoK368>

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## Part 2: Getting Started with AI Agents in n8n

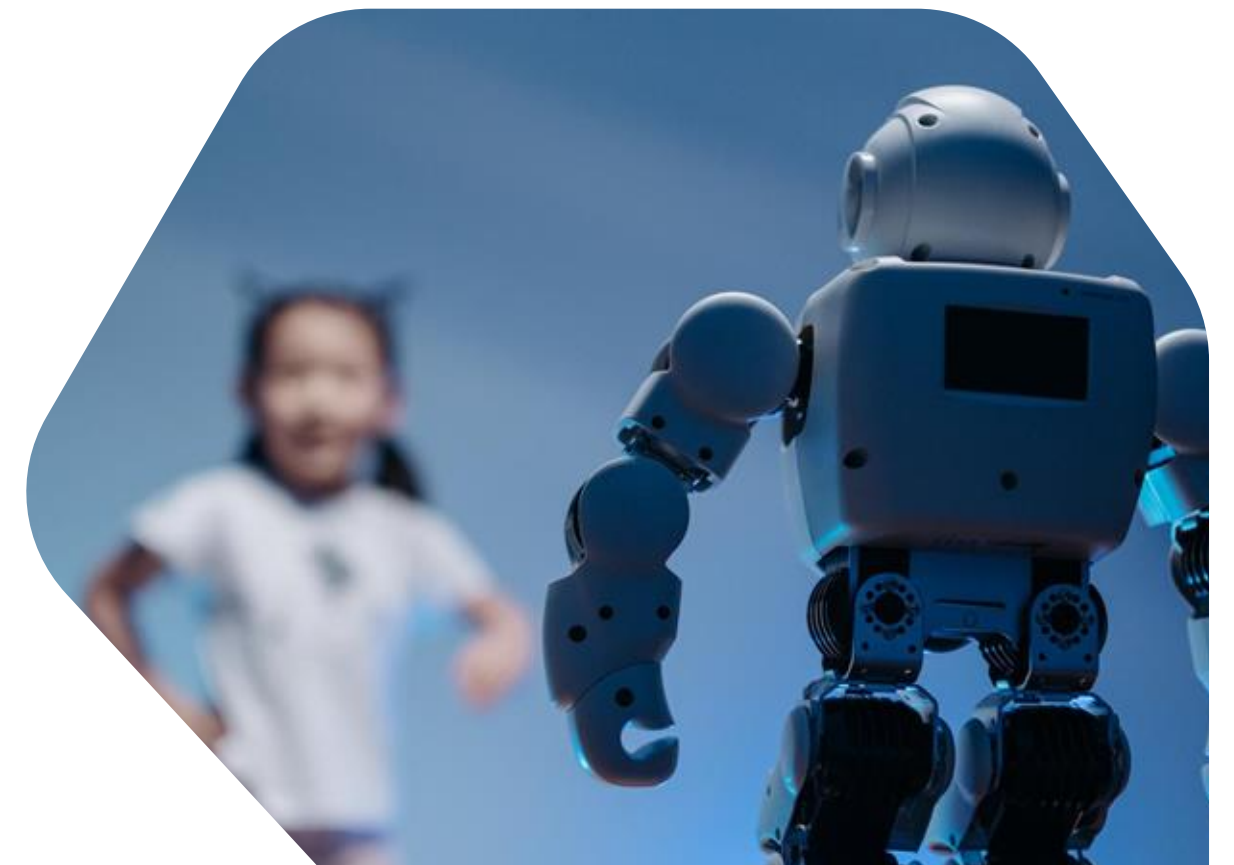
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**Join us next time  
May 14 @6 pm ET**

Get a beginner-friendly introduction to n8n and learn the foundational building blocks of an AI agent workflow, including prompts, tools, models, triggers, outputs, and human checkpoints.

**Career value:** Move from AI awareness to applied workflow thinking—an increasingly valuable capability in today's workplace.





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# Thank You

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