

PMI LITTLE ROCK · OCTOBER 16, 2026

YOUR MONDAY AI ADVANTAGE

A Project Manager's Field Guide to
Human + AI Orchestration

THE HUMAN GAP™ · MINDSETS > MACHINES™

Shirelle N. Francis

PMP · CSM · Prosci OCM

Founder & Principal Consultant, iLeap Group

Technology changes systems. People transform organizations.

This is a working guide, not a book.

Write in it during the keynote. Run it on Monday.

One workflow. Thirty minutes. Thirty days.

START HERE

Use it with the keynote. Then use it Monday.

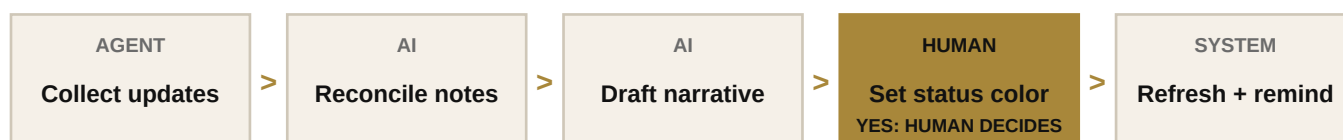
The keynote gives you the story. This guide gives you the move.

In the room you used three pages: Tool 2, “Not sure what to pick?” and Your Turn. They were on your worksheet. The rest of this guide is yours for Monday.

WHAT YOU BUILT TODAY

1. **One workflow** written out as steps (Tool 2).
2. A **lane on every step**: Human, AI, Agent or System.
3. A **YES marked** on every step where a person decides.

THAT IS THE WHOLE SKILL: A WORKFLOW YOU CAN READ AT A GLANCE



You are the **orchestrator**. You decide the steps, who or what does each one, and where you stay in the loop.

THE CASE WE WILL USE · PROJECT ATLAS

Atlas is a **composite** program. The pattern is painfully familiar.

Moment	What happened
Friday 9:47 PM	AI turns meeting notes, Jira data and email into a polished, all-green status report. The PM sends it.
Tuesday	Sponsor learns the vendor is six weeks behind. The team had said so. AI called it a “minor timeline adjustment.”
The gap	Nobody had defined what AI was <i>not</i> allowed to decide.

The problem was not “bad AI.” It was bad delegation plus invisible judgment.

YOUR MAP

Tool	Name	Use it to
1	The Mirror	See where you are today
2	Build the workflow (HAAS)	Steps, lanes, human decisions
3	HUMAN Check™	Set the guardrails
4	Output Check	Check before you send
5	The Monday 30	Do it all in 30 minutes
6+	30-Day · Starting points · Your Turn	Prove it, pick it, start now

Where are you today?

FOR MONDAY

Mode	Core question	Typical use
USER	“Do this for me.”	Emails, summaries, status drafts
THINKER	“Think with me.”	Scenarios, risks, assumptions
DESIGNER	“Where should AI live?”	Human work, AI work, decisions
ORCHESTRATOR	“How do I lead the whole system?”	People, AI, agents, data, outcomes

Not a maturity score. Higher is not automatically better. The right mode depends on the stakes: a User on a low-stakes task is fine.

PLACE YOURSELF · ONE ROW PER WORKFLOW · CIRCLE THE STAKES, THEN MARK THE MODE YOU USE MOST

WORKFLOW	STAKES	USER	THINKER	DESIGNER	ORCHESTRATOR
Atlas · Friday night	L M H				
Atlas · take two	L M H				
	L M H				
	L M H				
	L M H				
	L M H				

HOW TO READ IT

Your gap is any row where the stakes are H and your mark sits in USER or THINKER. That is Friday-night Atlas. Circle every one, then pick the worst. That is your workflow for the Monday 30.

The high-stakes workflow where I am still a User or Thinker:

What I would have to own differently to move up one mode:

Build the workflow: who owns each step?

ON YOUR WORKSHEET

Three moves: 1) list the steps as they really happen, 2) give each step a lane, 3) write **YES** where a human decides.

Lane	Owens work that requires
H · Human	Judgment, empathy, authority, accountability
AI · Assisted (e.g., Copilot)	Analysis, drafting, pattern finding, decision support
A · Agent	Repeatable work inside guardrails
S · System	Predictable, deterministic actions

ATLAS, TAKE TWO (EXAMPLE)

#	Step	Lane	Human decides?
1	Collect updates from leads	A	–
2	Reconcile notes, Jira, email	AI	– flags conflicts only
3	Summarize working sessions	AI	– quotes dates word for word
4	Set the status color	H	YES
5	Call the sponsor about a slip	H	YES
6	Refresh dashboard, send reminders	S	–

Rule of thumb: if a step changes a status, a date, a dollar or a relationship, a human decides. Delegation is not abdication.

YOUR WORKFLOW

My workflow: _____

#	Step (as it really happens today)	Lane	Human decides?
1			
2			
3			
4			
5			
6			
7			

No agents yet? Use only H and AI. That is a good start.

Five questions before AI touches the work

FOR MONDAY

	Question	On Project Atlas
H	Human judgment · where must a person stay involved?	Any schedule change over one week.
U	Use case · what exactly are we delegating?	Summarizing working-session notes. Not deciding status.
M	Measure · how will we know the output is acceptable?	Every date change is quoted word for word.
A	Accountability · who owns the decision?	The PM owns the status color. Always.
N	Next action · what happens after the output?	PM calls the sponsor within 24 hours.

Your H is the set of YES steps you marked in Tool 2. Start there.

WORKSHEET · FOR MY WORKFLOW

H Where must a person remain involved?

U What exactly are we delegating?

M How will we measure acceptable output?

A Who owns the decision and the outcome?

N What happens next after the AI output?

Before you hit send

FOR MONDAY

Question	What it protects
Is it true?	Trace each meaningful claim to a source.
What's missing?	Look for omissions, not just errors.
Would I sign it?	Your name and judgment stay attached. Not the AI's.
Who hears it first?	Bad news travels up before it travels out.

Atlas: “Vendor: on track.” Says who? The transcript said six weeks. Sixty seconds of checking protects months of trust.

60-SECOND WORKSHEET · USE BEFORE AN AI-ASSISTED DELIVERABLE LEAVES YOUR HANDS

TRUE Which claims did I verify, and where?

MISSING What might the output have left out?

SIGN Would I personally defend this in the steering committee?

FIRST Who needs the news before this is distributed?

Thirty minutes. Six questions.

FOR MONDAY

One workflow, one timer, five minutes per question. Do **not** automate anything yet. The gold line is Project Atlas, completed.

My workflow: _____ Start time: _____

:00 OUTCOME

Why does this workflow exist?

Atlas: Cut weekly status prep from four hours to one, without losing accuracy, traceability or risk visibility.

:05 CURRENT WORK

What actually happens today?

Atlas: Updates in → PM consolidates → validates → chases gaps → writes narrative → updates RAID → builds steering deck.

:10 FRICTION

Where do humans lose time or trust?

Atlas: Chasing updates; reconciling notes, Jira and email; rewriting the narrative; re-keying the RAID.

:15 DELEGATION → fill Tool 2

Human, AI, agent or system?

Atlas: System: dashboard, reminders. Agent: chase updates. AI: summarize, draft. Human: status color, escalation.

:20 GUARDRAILS → fill Tool 3

What needs human approval?

Atlas: Any slip over one week goes to the PM. PM calls the sponsor within 24 hours.

:25 MEASURE

What should improve?

Atlas: Prep time 4h → 1h. Risks surfaced before steering. No "why am I just hearing about this?"

The Monday 30 is the whole job. At :15 and :20 you are filling Tool 2 and Tool 3, not starting two more exercises.

One workflow. Thirty days. Proof.

FOR MONDAY

Week	Move	Proof I will capture	Done
1	Map it. Run the Monday 30.	Real workflow + baseline numbers (below).	
2	Delegate one step. Only one.	What AI did, and what I corrected.	
3	Guard it. Run the HUMAN Check.	Written rules and escalation points.	
4	Measure + share.	Before/after shown to my sponsor or team.	

SCORECARD · PAIR SPEED WITH QUALITY, RISK AND TRUST

Measure	Before (Week 1)	After (Day 30)	What changed?
Preparation time			
Decision cycle time			
Risks identified earlier			
Rework			
Stakeholder confidence (1–5)			

The human measure: do the people in this workflow feel more capable, more trusted, and clearer about what they own?

What changed for the people in this workflow?

At Day 30, send me your before and after: shirelle@ileapgroup.com

NOT SURE WHAT TO PICK?

Three workflows to start with

ON YOUR WORKSHEET

Pick **one**. Each of these has a clear outcome, a clear H, and a number you can measure.

Workflow	Outcome	Your H (stays human)	Measure
1 • Risk management weekly RAID review	Surface emerging risks a week earlier without inflating the register.	AI can propose a risk. Only a person changes a rating or accepts one.	Days earlier a risk was identified; stale items; rework.
2 • Meeting follow-up decisions and actions	Decisions, owners and dates out within hours, without losing what is unresolved.	Nothing is assigned to a named person until you confirm it. Scope, budget or conflict never goes out as a raw AI summary.	Time to send minutes; dropped actions; rework.
3 • Steering communications updates and options	Walk into steering with options and a recommendation, not a surprise.	Bad news reaches the sponsor by phone before it goes in a document.	Sponsor confidence (1–5); surprises; decision cycle time.

Which first? Use the stakes rule: start where stakes are high and you are still a User. If your team is nervous about AI, start with meeting follow-up for a safe first proof.

STUCK? START WITH ONE OF THESE TWO

A • Stakeholder updates	B • Weekly risk review
1 Gather status from the leads 2 Draft the update and options 3 Decide what bad news goes first 4 Brief the sponsor before it is sent 5 Send it and log the actions	1 Collect new risks and changes 2 Spot stale or rising risks 3 Decide any rating change 4 Escalate what needs the sponsor 5 Update the risk register

You choose the lane for each step. **Check yourself:** two of the five steps should be YES.

Want a head start from Copilot? Try: *“I am a project manager. My workflow is [stakeholder updates / a weekly risk review]. List the steps I take, in order, as they really happen. For each step, suggest who should own it: me, AI, an agent or an automated system. Mark any step that changes a status, date, dollar or relationship as a human decision.”* Use a generic project. Do not paste confidential data.

YOUR PICK

The workflow I will start with:

Why this one? (stakes, time lost, frustration)

Who needs to know I am trying this?

What good can look like

FOR MONDAY

Both starters, finished, using Atlas. **One good answer, not the only one.** Your lanes depend on your guardrails and your team.

A · STAKEHOLDER UPDATES

#	Step	Lane	Human decides?
1	Gather status from the leads	A	–
2	Draft the update and options	AI	– marks anything unconfirmed
3	Decide what bad news goes first	H	YES
4	Brief the sponsor before it is sent	H	YES
5	Send it and log the actions	S	–

Why: the vendor slip is bad news. A human decides it goes first, and the sponsor hears it by phone on Friday, not in a room on Tuesday.

B · WEEKLY RISK REVIEW

#	Step	Lane	Human decides?
1	Collect new risks and changes	A	–
2	Spot stale or rising risks	AI	– proposes, never rates
3	Decide any rating change	H	YES
4	Escalate what needs the sponsor	H	YES
5	Update the risk register	S	–

Why: moving the vendor risk from yellow to red changes a status and a relationship. AI can propose it. Only a person accepts or changes it.

Check: two of the five steps are YES in both. Your YES steps are the H in your HUMAN Check (Tool 3).

Pick your workflow. Find your H.

ON YOUR WORKSHEET

First, on Tool 2 (your worksheet): write 4–5 steps of your workflow, circle a lane on each, and write YES where a human decides. Then finish this page.

The one workflow I will redesign:

Where must a human remain involved, and why?

The first AI-assisted step I will test:

The outcome I will measure:

Then read your YES steps and your H out loud to the person next to you.

YOUR MONDAY MOVE

1. Block 30 minutes. Run the Monday 30 (Tool 5) on one recurring workflow.
2. Write your H: the judgment point you will not delegate.
3. Put Day 30 on your calendar (Tool 6). Bring a before and after.

The future doesn't need PMs who use AI.

It needs PMs who lead it.

Mindsets > Machines™

Shirelle N. Francis, PMP, CSM, Prosci OCM

shirelle@ileapgroup.com • ShirelleFrancis.com • iLeap Group

WHAT'S NEXT

The 5-Day Field Book (ebook) goes deeper on the thinking behind each tool. Scan the QR for your ebook, files and consult.

The free extended edition arrives in November.

The ebook tells you how to get it.

SCAN FOR
YOUR FILES

shirellefrancis.com/shirellefrancis-com-pmilitlerock



Questions, ideas, next steps