

PROJECT  SUMMIT
BUSINESS ANALYST WORLD

FUTURE FORWARD

BOSTON, MA

OCTOBER 19-22, 2026

BOSTON MARRIOTT BURLINGTON HOTEL

ON-LINE BROCHURE



Macgregor
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ADVISORY BOARD: WHY ATTEND:

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- 1** EARN UP TO
22 PDUs and CDUs
over 4 days
- 2** TOP QUALITY EDUCATION
AT COMPETITIVE PRICES
- 3** REGIONAL ADVISORY BOARD
THAT TARGETS **LOCAL ISSUES**
- 4** **4 TRACKS**
TO SELECT FROM
- 5** **NETWORKING**
UNLIMITED NETWORKING
OPPORTUNITIES WITH YOUR
PEERS



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GREETINGS FROM THE CONFERENCE VICE PRESIDENT

Join Us at ProjectSummit*BAWorld Boston!

This October 19–22, ProjectSummit*BAWorld returns to Boston for **four days of learning, practical insights, new ideas and meaningful connections** — all designed for today's project professionals.

And this year, there is more to explore than ever.

For the first time in Boston, our program features all four of our new tracks: **Delivery & Execution, Strategy & Transformation, Power Skills and Tools, Data & Innovation.**

Whether you want to strengthen the way you deliver projects, navigate organizational change, develop the skills that make you more effective with people or better understand how AI, data and emerging technologies are changing the way we work, you can build an experience around what matters most to you.

And you do not have to choose just one track.

Mix and match sessions throughout the conference. Step outside your usual area of expertise. Discover a new approach to a familiar challenge. Learn something you can take back to work and put into practice right away.

With **four days of programming and up to 22 PDU/CDUs available**, ProjectSummit*BAWorld Boston is also an opportunity to make significant progress toward your professional development requirements while choosing from a wide range of sessions, workshops and learning experiences.

But this conference has always been about more than what happens in the meeting rooms.

One of the things that makes ProjectSummit*BAWorld special is the community that surrounds it. Our speakers do not simply deliver a presentation and disappear. Many stay throughout the event, attend other sessions and spend time talking with attendees. Conversations continue over lunch, during breaks and long after a session has ended.

You will meet project professionals facing many of the same challenges you are. You will exchange ideas, ask questions, share experiences and make connections with people you may never have met otherwise.

That is the ProjectSummit*BAWorld experience.

Four days to learn. Four days to connect. Four days to challenge the way you think about your work and explore what comes next.

If you have been thinking about joining us in Boston, now is the time.

Register today and make ProjectSummit*BAWorld Boston part of your professional development plans for 2026.

I hope to see you there — and when you arrive, please come and say hello. I would love to meet you!

Amy Ruddell | Vice-President, Business Unit
ProjectSummit*BusinessAnalystWorld
aruddell@macgregorcom.com

2026 KEYNOTE SPEAKERS



KEYNOTE

Power Without Permission

VICTOR NICHOLS II

COACH VIC, STRATEGIC PARTNERSHIPS AND
ENGAGEMENT LEAD, GENENTECH

OCTOBER 19 | 8:30AM - 9:45AM

Leadership influence doesn't come from title alone. Many leaders must shape decisions, align stakeholders, and drive outcomes without direct authority. In this keynote, Vic Nichols introduces the G.R.A.C.E. Framework™, a practical model for strengthening influence, credibility, and executive presence. Attendees will learn how to read organizational dynamics, communicate with clarity, align priorities, and build trust that drives results. Through engaging stories and practical insight, leaders will leave with a clear roadmap for influencing effectively — even when they don't control the room.

Learning Objectives

- Attendees/participants will learn how to harness the dynamics of power which can help them lead more effectively, productively, and authentically
- Attendees/participants will explore their own leadership strengths and potential derailers
- Attendees/participants will have the opportunity to pinpoint challenges and solutions related to developing talent



KEYNOTE

Defeating Your Inner Demons: Lessons Learned From "K-Pop Demon Hunters"

HANS ECKMAN

PRINCIPAL RESEARCH DIRECTOR, INFO-TECH
RESEARCH GROUP

OCTOBER 19 | 3:45pm - 4:45pm

"Our faults and fears must never be seen." On June 20th, 2025, "K-Pop Demon Hunters" quietly launched on Netflix. From the same Sony animation studio behind "Spiderman: Into the Spider-Verse", the movie and soundtrack haven't stopped breaking records: Most-watched Netflix original (+326m views in 90 days), the soundtrack reached Platinum, most all-time sales from an all-female group (passing Destiny's Child), and three songs in the Billboard Hot 100, to name just a few. KDH wasn't just stunning animation and music. It's the depth of the characters and their journeys that made the movie so compelling. Demons may not be real (hopefully), but we're all haunted by moments from our past, imposter syndrome, and self-doubt. If demons represent the damage caused by our faults and fears, then what are the "patterns" that give demons power over us? K-Pop Demon Hunters provides a magical backdrop for understanding our own character development. Their character journeys provide us with three models for harnessing our strengths and finding happiness. In this session, we'll join HUNTR/X in their battle to destroy our own demons and limitations. SPOILER ALERT, but seeing this keynote before watching the movie will give you a deeper understanding and appreciation for the brilliant storytelling and life insights. •Use lessons from K-Pop Demon Hunters to understand how our "patterns" hold us back and steal our souls. •Apply Rumi's three approaches to fighting demons to help us defeat our inner demons. •Learn how to find the strength in your voice and use it fly free.

2026 KEYNOTE SPEAKERS



KEYNOTE

The AI Era Was Built for People Like You. Prove It.

JAMIE CHAMPAGNE

CBAP, PMP, CHAMPAGNE COLLABORATIONS

OCTOBER 20 | 8:30AM - 9:45AM

Every major technology shift creates a new class of indispensable professionals — the ones who recognize the moment, position themselves early, and lead while others are still trying to understand what's happening. This is that moment. Short Summary: Business analysis professionals, project managers, and change agents have always been the bridge between business and technology. AI just made that bridge more valuable than ever. In 90 minutes, Jamie Champagne gives you the framework, the tool, and the peer conversation to stop watching the AI wave and start charging it. Full Description: Every major technology shift creates a new class of indispensable professionals — the ones who recognize the moment, position themselves early, and lead while others are still trying to understand what's happening. This is that moment. Business analysis and project management professionals — the people who ask the right questions, translate complexity, align stakeholders, and make technology actually work in the real world — are the most underestimated asset in any AI conversation. Jamie Champagne is here to change that, starting with you, starting now. In this electrifying 90-minute keynote, you'll gain a practical lens for navigating AI conversations in your organization, see live demonstrations of AI applied in real analysis and project scenarios, and walk away with a structured approach to positioning your value in an AI-driven environment. Most importantly, you'll complete a hands-on AI Work Audit alongside your peers — turning insight into immediate, actionable direction. Come in curious. Leave dangerous.



CTRL+YOU: The Game Show Workshop for Admins Who Want to Outsmart AI Before It Outsmarts Them

LESLIE HUGHES

CM, LINKEDIN PROFILE
WRITER, PUNCH!MEDIA

PHIL BARTH

PMP, CEO, GREAT
THINGS HAPPEN LLC

OCTOBER 20 | 2:30pm - 3:30pm

CTRL+YOU Live! is a high-energy keynote that challenges Project Managers and Business Analysts to rethink how they work with AI. Put your analysis and judgment skills to the ultimate test by participating in various games that expose how to use AI properly, what most people get wrong about prompting, and a twist how you can choose the right AI tool for you! You'll walk away with understanding how to use AI as a thinking partner, a clearer picture of the AI landscape, and at least one thing you'll try before end of the week.

Learning Objectives

- Leave with practical templates, prompt structures, and use cases that can be applied immediately at work.
- Learn how to design effective AI prompts to improve communication, planning, and analysis.
- Practice applying AI tools to real-world PM and BA challenges through interactive team games.

Schedule at-a-glance

Monday, October 19

8:30 am - 9:45 am	 Power Without Permission Victor Nichols II Coach Vic, Executive Coach, Next Level Leadership			
	Delivery & Execution	Power Skills	Technology Tools and Innovation	Strategy & Transformation
10:00 am - 11:00 am	Panel Discussion The Human Side of Agile: Driving Relationships, Collaboration and Engagement Danielle Correia Zahava Savory Teri Christian Apex Systems	Stop Collecting Contacts and Start Creating Connections: Powerful Networking Secrets That Don't Feel Cringey Leslie Hughes PUNCH Media	Data Storytelling with AI: Turning Numbers into Narratives Barbara Jones Insight Enterprises	Is Your BA Role About to Be Automated, or Elevated? Vincent Mirabelli Love the Process Academy
11:15 am - 12:15 pm	Taking Over an Existing Project Martin Fenelon MSD Games, LLC	Defining Agile Success: Aligning Roles, Teams, and Leadership Through Shared Maturity Luba Sakharuk Apex Systems	AI-Assisted Process Mapping Scott Helmers Harvard Computing Group	The Essential Skill Sets Business Analysts Need Today and Tomorrow Jamie Champagne Champagne Collaborations
12:15 pm - 1:15 pm	Lunch			
1:15 pm - 2:15 pm	Maximizing Your Impact: Career Development in Project Management Vincent Mirabelli Love the Process Academy	The Art of No: Saving Your Sanity One Boundary at a Time Jennifer Battan Spark Collaborative	Puppies and Chickens and Diapers, Oh My! Making Life Better by Using AI Phil Barth Great Things Happen LLC	Requirements Traps AI Probably Won't Avoid Robin Goldsmith Go Pro Management, Inc.
2:30 pm - 3:30 pm	The Psychology of Productivity Through Gamification Bola Adesope SixDots Growth Inc	Present to Win: Strategies for Presenting to Stakeholders Pamela Paterson Consultant	Stop Prompting, Start Architecting: The Rise of the AI-Enhanced Business Analyst Lakshmi K P Object Edge Inc.	Stop Doing What You're Doing: Transform from Being Project Managers to Strategic Investment Advisors Anthony Henderson Collaborative Enterprises
2:30 pm - 3:30 pm	 Career Enhancing Moves for BAs and PMs Kent McDonald Writer and Product Manager, KBPMedia			

Schedule at-a-glance

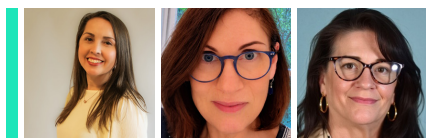
Tuesday, October 20

8:30 am - 9:45 am	 The AI Era Was Built for People Like You. Prove It. Jamie Champagne CBAP, PMP, Champagne Collaborations			
	Delivery & Execution	Power Skills	Technology Tools and Innovation	Strategy & Transformation
10:00 am - 11:00 am	This is the Greatest Show! Backlog Management, PT Barnum Style Jennifer Battan Spark Collaborative	Muda, Mura & Muri: The Three Amigos of Organisational Inefficiencies Bola Adesope SixDots Growth Inc	Prompt like a Pro: AI Prompt Techniques and Optimization for Project Managers or Business Analysts Barbara Jones Insight Enterprises	Strategic Project Management Shannon Pettiford Boston Consulting Group
11:15 am - 12:15 pm	Agile User Stories Chris Sims Agile Learning Labs	Effective Organization Change Martin Fenelon MSD Games, LLC	Hammer it Home! Update Your BA Toolbox Jennifer Bedell Mariner Innovations	Psychometrics for Strategic Business Analysis Trent Leopold University of Texas
12:15 pm - 1:15 pm	Lunch			
1:15 pm - 2:15 pm	Career Paths - What will our roles look like in the future? Vincent Mirabelli Love the Process Academy Hans Eckman Info-Tech Research Group / Eckman Guides	The Power of Your Voice: Skills for Crucial Conversations Elias Mokole ELM consultants	Artificial Intelligence Product Roadmap Vision Salah Jaber Dell/EMC Ipek Guray WPI	Panel Discussion: Show Me the Money: How AI is Transforming Business Value Estimation Peter Schwalm National Grid Shannon Pettiford Boston Consulting Group Anthony Henderson Collaborative Enterprises
2:30 pm - 3:30 pm	  CTRL+YOU: The Game Show Keynote for PMs and BAs Who Want to Outsmart AI Before It Outsmarts Them Leslie Hughes , LinkedIn Profile Writer, LinkedIn Trainer, Public Speaker, & CEO, PUNCH Media Phil Barth , PMP, CEO, Great Things Happen LLC			

Symposium Sessions

Monday, October 19

10:00am - 11:00am



Panel Discussion - The Human Side of Agile: Driving Relationships, Collaboration and Engagement

Danielle Correia

Practice Director,
Apex Systems

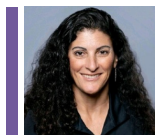
Zahava Savory

Apex Systems

Teri Christian

Apex Systems

Join us to learn a few new secrets behind high-performing project teams in today's adaptive work environments! This interactive panel of senior Agilists at Everforth Apex will dive into a couple core elements that drive project and team success: building authentic relationships, running effective meetings, and transforming retrospectives into powerful tools for growth. Discover practical strategies for establishing trust, understanding what truly matters to your stakeholders, and setting up working agreements that stick. Learn how to turn daily status reports into engaging daily planning sessions, and explore creative retrospective formats like the "treasure map" and "retrospective karaoke" to boost team energy and insight. You will walk away with actionable tips, real-world examples, and fun, adaptable techniques you can use immediately to foster collaboration, spark engagement, and deliver meaningful results!



Data Storytelling with AI: Turning Numbers into Narratives

Barbara Jones

Insight Enterprises

Project managers and business analysts often have data but struggle to turn it into decisions. This session shows how AI-supported data storytelling helps PMs and BAs transform complex information into clear narratives and visuals that align stakeholders, support business cases, and drive confident action across projects and programs.

Learning Objectives

- Improve stakeholder alignment and decision-making by applying AI-supported storytelling to project updates, business cases, and executive communications
- Translate complex data into clear, decision-ready narratives using a structured storytelling framework supported by AI
- Apply AI-assisted techniques to identify insights and design visuals that communicate one clear, actionable message per slide



Stop Collecting Contacts and Start Creating Connections: Powerful Networking Secrets That Don't Feel Cringey

Leslie Hughes

LinkedIn Profile Writer, LinkedIn Trainer, Public Speaker, & CEO, PUNCH Media

Networking isn't about collecting contacts and business cards, it's about building authentic visibility before you need it. This workshop gives PMs and BAs strategies, scripts, and LinkedIn tactics to create meaningful connections, strengthen influence, and make their network work for them.

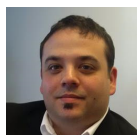
Learning Objectives

- Use practical scripts and exercises to turn small interactions into lasting professional relationships
- Discover how to build and maintain a professional network before you need it
- Apply modern LinkedIn and digital visibility strategies to showcase expertise

Symposium Sessions

Monday, October 19

10:00am - 11:00am



Is Your BA Role About to Be Automated, or Elevated?

Vincent Mirabelli

CBAP, CCXP, MBB, PMP, Love the Process Academy

AI is already rewriting what business analysts do day-to-day, but the current conversation is stuck on a false binary: is your role to be automated, or is it safe? This session reframes the question. Using a five-level BA maturity model, we'll map exactly which BA tasks compress under AI, which ones become more valuable, and what separates a BA who's at risk of being replaced from one who's being elevated. Attendees will walk away with a live, in-session self-assessment they can use immediately to locate their own team's position... not a theoretical framework, but a diagnostic they can take action on Monday morning. By the end of this session, attendees will be able to: 1. Identify which BA capabilities are shifting toward AI execution versus remaining irreducibly human, and why the distinction matters for career planning. 2. Apply a five-level maturity model to assess where their own BA practice currently sits on the AI-augmentation curve. 3. Recognize the gap between individual BA skill growth and team- or organization-level AI readiness, and why closing one doesn't automatically close the other.

Monday, October 19

11:15am - 12:15pm



AI-Assisted Process Mapping

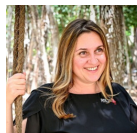
Scott Helmers

Partner, Harvard Computing Group

You've probably been creating process maps for years. And you've probably experimented with or used AI in your job as a BA or PM. But have you combined the two? In this session, you'll see numerous live demos of ways to use AI to create maps from text or structured data, or to analyze and extract knowledge from an existing map. We'll dig into the AI capabilities of multiple process mapping tools, including draw.io, Lucidchart, and SmartDraw. As a bonus, you'll learn about Mermaid syntax!

Learning Objectives

- Leverage what you already know to make AI-generated maps better
- Use AI to create process maps from narrative descriptions
- Analyze and identify potential improvements in a process map



Defining Agile Success: Aligning Roles, Teams, and Leadership Through Shared Maturity

Luba Sakharuk

Sr Lead Consultant, Apex Systems

Agile transformations often stall when success is not clearly defined. This session shares a real world Agile transformation where progress emerged through a shared maturity model, clear boundaries between Business Analyst and Product Owner roles, and strong collaboration across teams and leaders. Attendees will learn how Business Analysts can help organizations align, communicate progress, and focus on business outcomes rather than Agile mechanics.

Learning Objectives

- Identify practical ways Business Analysts can strengthen Agile delivery by clarifying BA and Product Owner responsibilities to improve decision-making, backlog quality, and alignment between business intent and execution
- Describe how a shared definition of Agile maturity enables alignment across teams and leadership, shifting the focus from Agile mechanics to meaningful business outcomes
- Apply approaches for communicating Agile progress to executives by translating maturity insights into themes of organizational health, alignment, and value—rather than Agile terminology

Symposium Sessions

Monday, October 19

11:15am - 12:15pm



Taking Over an Existing Project

Martin Fenelon

PMP, CGEIT, Program Director, MSD Games, LLC

We've recently seen a number of large, complex project failures. What if you have just been assigned to take over a project that is in trouble, and you have to turn it around ASAP. Where do you start? How do you get the team to understand and support the changes that you need to make to get the project back on track? Are there any tools or guidelines that can help? What help should you request from your executives and project sponsor? What about the former project manager, where do they fit in?

Learning Objectives

- Identifying leverage points to turn around troubled projects and project teams
- Rapidly identifying key issues and problems in an existing project
- Tactics to keep the project team focused and involved while changing project dynamics



The Essential Skill Sets Business Analysts Need Today and Tomorrow

Jamie Champagne

CBAP, PMP, Champagne Collaborations

The role of the Business Analyst is evolving beyond documentation. This session explores the essential skills needed to remain relevant in complex, fast-changing environments. Learn how agility, stakeholder engagement, communication mastery, and structured problem-solving position analysts as trusted advisors. Leave with practical strategies to strengthen influence and future-proof your role.

Learning Objectives

- Apply techniques that strengthen stakeholder engagement, agility, and influence
- Develop strategies to enhance effectiveness and remain relevant in evolving environments
- Identify the critical competencies required for modern business analysis work

Monday, October 19

1:15pm - 2:15pm



Maximizing Your Impact: Career Development in Project Management

Vincent Mirabelli

CBAP, CCXP, MBB, PMP, Love the Process Academy

In today's fast-paced and complex business environment, effective project management is essential for success. But project management is not just about processes and tools - it's about leadership, communication, and vision. As a project manager, you have the opportunity to lead teams, drive change, and achieve extraordinary results. But how do you unlock your potential as a leader and advance your career in project management? In this session, we will explore the essential skills and strategies for developing your leadership and career in project management. Drawing on the latest research and best practices, we will examine the key challenges and opportunities facing project managers today, and provide practical guidance on how to navigate them successfully. Whether you are an experienced project manager or just starting out, this session will provide valuable insights and actionable advice for unlocking your potential as a leader and achieving your career goals in project management. Join us for an engaging and thought-provoking discussion that will help you take your leadership and career to the next level.

Symposium Sessions

Monday, October 19

1:15pm - 2:15pm



Puppies and Chickens and Diapers, Oh My! Making Life Better by Using AI

Phil Barth

PMP, CEO, Great Things Happen LLC

From Puppies to Rubber Chickens to One Unforgettable Diaper Story. Artificial intelligence is everywhere—but for many professionals, it has added more stress, noise, and overwhelm instead of clarity. In session, Phil Barth cuts through the hype to show how AI tools can be used responsibly to reduce stress, improve focus, and support better decision-making—without losing the human touch. Attendees learn how to use AI to simplify communication, reduce cognitive overload, and think more clearly under pressure—without needing technical expertise or endless new too.

Learning Objectives

- Practical methods to improve clarity, focus, and decision-making
- Ways to reduce stress and overwhelm using AI responsibly
- A human-first framework for using AI without losing judgment or control



Requirements Traps AI Probably Won't Avoid

Robin Goldsmith

President, Go Pro Management, Inc.

Requirements issues cause most software problems. Teams expect Artificial Intelligence (AI) to fix it, but AI is only as smart (or dumb) as humans it learns from. When defining requirements, humans (and thus AI) fall into common traps, which often masquerade as conventional wisdom. Over-relying on AI to identify requirements accurately, especially without awareness of potential pitfalls, can create serious problems. Learn about them in this interactive session so you can avoid them.

Learning Objectives

- Common requirements traps you can't rely on AI to avoid
- How AI "learns"
- How conventional wisdom can skew AI's learning



The Art of No: Saving Your Sanity One Boundary at a Time

Jennifer Battan

CSM, CSPO, CBAP®, Founder, Spark Collaborative

The most scarce resource in modern work isn't time—it's attention. Yet many of us unintentionally give ours away through over-commitment, reactive communication, and porous boundaries. Let's reframe "no" as a strategic skill that strengthens performance, prevents burnout, and enables high-value work. We'll learn proven techniques for calendar protection, streamlined communication habits, and intentional time design. You'll walk away with practical steps to reclaim your headspace and flourish.

Learning Objectives

- Learn ways to "make time" through techniques that encourage hyper-focus, deep thinking, and a sustainable workflow
- Discover which tasks should be declined, deferred, delegated, or redesigned
- Learn to recognize the cognitive and productivity costs of saying "yes" too often

Symposium Sessions

Monday, October 19

2:30pm - 3:30pm



Present to Win: Strategies for Presenting to Stakeholders

Pamela Paterson

Consultant

Stakeholders have short attention spans for presentations — if you can't get your idea across in a few slides in a way they can absorb, they start multitasking and wondering when it will be over. In other words, you have lost them as an audience. Why does this matter? We need stakeholders' attention to secure buy-in, collaboration, and decisions. In this session, you'll learn top strategies to keep stakeholders engaged based on your own communication goals.

Learning Objectives

- Recognize the factors that cause stakeholders to disengage during presentations and why attention is critical for buy-in and decision-making
- Apply principles from visual communication, learning theory, and communication science to create concise, engaging presentation content
- Deliver presentations that sustain stakeholder focus, strengthen collaboration, and generate clearer, more actionable feedback



Stop Doing What You're Doing: Transform from Being Project Managers to Strategic Investment Advisors

Anthony Henderson

President, Collaborative Enterprises

Managers do things right while leaders do the right things. This session will provide attendees with tactical steps to transform project professionals' approach from managing project and programs to being trusted advisors to the executives in their organizations. Attendees will leave with pragmatic approaches for providing insights that help their executive stakeholders make informed investment decisions for realizing strategic objectives.

Learning Objectives

- Attendees will be able to effectively elevate their impact on the strategic success of their organizations.
- Attendees will be able to improve their standing as trusted advisors to their executive stakeholders.
- Attendees will receive actionable recommendations for leveraging their unique perspectives to proactively advise executives on project investment decisions and tradeoffs.



Stop Prompting, Start Architecting: The Rise of the AI-Enhanced Business Analyst

Lakshmi K P

Fellow, AI Guild, Object Edge Inc.

Beyond the prompt: Become the architect of your own automation. Join Lakshmi KP to learn how BAs can move from AI consumers to tool builders. Discover how to leverage intent-based development to create custom agents that accelerate discovery, map legacy "black boxes," and optimize your workflow. Learn to engineer your own professional force multipliers and redefine the BA role for the AI era. Don't just use AI - build the tools that make you indispensable.

Learning Objectives

- Workflow Optimization: Identifying specific BA tasks that are prime candidates for custom AI-agent automation
- The Transition to "Builder": Understanding how AI-assisted development allows BAs to create custom tools without a traditional programmer background
- Strategic Architecture: Why building custom tools for "current state" clarity is the most critical prerequisite for successful AI implementation at the enterprise level

Symposium Sessions

Monday, October 19

2:30pm - 3:30pm



The Psychology of Productivity Through Gamification

Bola Adesope

PMP, CBAP, ITIL, CSM, PSM, CSPO, IPC-ACC, SAFe SPC, Founder/Lead Advisor, SixDots Growth Inc

Are you ready to redefine productivity, drive project success and customer satisfaction? In this dynamic, practical and fun session, we'll apply gamification and science-based techniques to challenge traditional thinking and introduce you to mindset of getting more done to accelerate project delivery, and improve team collaboration. This session utilizes practical case studies, brain-based thinking, mindset, games and activities to foster foster collaboration team motivation, and performance.

Learning Objectives

- Enhance collaboration and team dynamics through gamified strategies that drive motivation and accountability
- Master the art of prioritization and productivity through WIP limits
- Dispel the myth of multitasking and understand why focusing on fewer tasks leads to better outcomes

Tuesday, October 20

10:00am - 11:00am



Muda, Mura & Muri: The Three Amigos of Organisational Inefficiencies

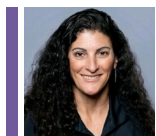
Bola Adesope

PMP, CBAP, ITIL, CSM, PSM, CSPO, IPC-ACC, SAFe SPC, Founder/Lead Advisor, SixDots Growth Inc

Have you ever paused to wonder why, despite you and your team's best efforts, inefficiencies keep creeping back into your processes like uninvited guest at a perfectly planned party? Making you and the team struggle to deliver VALUE at the speed and quality required? In this interactive session, we'll unpack how Mura (unevenness), Muda (waste), and Muri (overburden) operate across modern organizations, and more importantly, how to spot and eliminate them before they sabotage value delivery.

Learning Objectives

- Apply practical Lean tools to reduce waste and improve value flow
- Use practical tools to reduce waste, balance workload, and enhance flow in business processes
- Identify and distinguish between Mura, Muda, and Muri in real organizational contexts



Prompt like a Pro: AI Prompt Techniques and Optimization for Project Managers or Business Analysts

Barbara Jones

Insight Enterprises

Attendees will learn mnemonic devices to enhance prompt-writing skills for optimizing AI-generated outputs, and engage in hands-on exercises, starting with simple inputs and progressing to complex prompts. They will discover how to craft precise prompts for accurate AI responses. By mastering these techniques, they will improve their ability to leverage AI tools for project planning, risk management, and team collaboration, driving success.

Learning Objectives

- Improve Project Outcomes: Develop complex prompts tailored to project management tasks, boosting team collaboration and overall efficiency
- Optimize AI Outputs: Differentiate and refine prompts to ensure accurate AI-generated insights for risk management and problem-solving
- Enhance Prompt-Writing Skills: Learn mnemonic devices to create precise AI prompts, improving project planning and decision-making

Symposium Sessions

Tuesday, October 20

10:00am - 11:00am



Strategic Project Management

Shannon Pettiford

PMP, PMI-ACP, CSM, MS in Project Management, Senior IT Program Manager, Boston Consulting Group

Lead high-impact projects with confidence in this interactive Strategic Project Management course. Learn to align project goals with organizational strategy using real-world case studies, WBS, stakeholder mapping, MoSCoW, and risk analysis tools. Explore agile estimation, RACI, and conflict resolution while mastering project closure and continuous improvement techniques. Ideal for project managers, team leads, and emerging leaders ready to drive results.

Learning Objectives

- Learn to connect project goals with organizational strategy through the creation of business cases, project charters, and stakeholder alignment tools.
- Build leadership capabilities by applying agile principles, conflict resolution strategies, and post-project evaluation techniques like Kaizen, pre-mortems, and retrospectives to drive sustained project success.
- Gain hands-on experience using work breakdown structures (WBS), estimation techniques, RACI charts, and risk analysis frameworks to manage scope, time, and resources effectively.



This is the Greatest Show! Backlog Management, PT Barnum Style

Jennifer Battan

CSM, CSPO, CBAP®, Founder, Spark Collaborative

You run with me and I can cut you free of the drudgery you're stuck in. You can play it sensible, work all conventional, or you can risk it all... Ah yes, the promise of Agile! No documentation! Faster Delivery! Value delivered every week! Agile may not be considered the side show or circus approach to solution delivery, but there is still a lot for practitioners to understand. Let's take a tour of PT Barnum's world of Humbug and debunk some of the myths of agile. In this session, let's tame the beast that is the backlog! Do we need to create epics first? What do we do when everything is important? How to get our rag-tag bunch to work together (and ensure that the show does go on!)? You will: • Understand and recognize the backlog humbug & untruths (the myths that surround the backlog) • Learn tools and techniques that can help make your backlog more manageable • Work your backlog into a three-ring spectacle that communicates goals, context, and learn to wrangle the performers and ensure everyone is in their place when they are meant to be there.

Tuesday, October 20

11:15am - 12:15pm



Agile User Stories

Chris Sims

Agile Coach, Agile Learning Labs

Agile work requires agile requirements. User stories focus on people and value, so that the work will create real value for the stakeholders. In this session you will practice refining a product concept into a set of user stories that will drive shared understanding of: the value to be created, the people we'll create the value for, and what we will build to create that value. Along the way, we'll see how to handle annoying details like dependencies, deadlines, and important technical aspects.

Learning Objectives

- Understand how to write user stories that capture both the 'big picture' and the important details
- Capture requirements in a way that will lead to deeper shared understanding between stakeholders and developers
- Engage in structured conversations that uncover the most important and valuable details

Symposium Sessions

Tuesday, October 20

11:15am - 12:15pm



Effective Organization Change

Martin Fenelon

PMP, CGEIT, Program Director, MSD Games, LLC

Introducing new or revised applications forces people and organizations to change. The movement to agile methodologies has increased the pace of change, but organizations continue to struggle with adapting to new systems and business processes. Organizational change management cannot be an afterthought, despite the challenges of agile delivery. We'll review some of the key principles of OCM, along with warning signs and actions to take if OCM is not going well.

Learning Objectives

- Signs that OCM is not going well and tactics to get things back on track
- Key principles for successful OCM
- Understand the role of organizational change management in successful projects



Hammer it Home! Update Your BA Toolbox

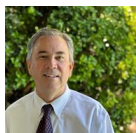
Jennifer Bedell

CBAP, SAFe POPM, FLMI, ACS, Senior Business Analyst / Community Leader, Mariner Innovations

Business Analysts use a variety of tools every day. Sometimes, we don't even realize we are using a tool or technique because it comes so naturally. In fact, you might be using outdated tools because you didn't realize there was a better way. Or because you didn't have the time to investigate. In this session, you will learn and practice updated BA tools and techniques that will help you "build" the right solution for your stakeholders (and not limit yourself to the solution they requested).

Learning Objectives

- Increased confidence in your ability to use timeless tools and techniques
- New ways to use existing tools and techniques
- Shiny new tools to round out your toolbox



Psychometrics for Strategic Business Analysis

Trent Leopold

Analyst, University of Texas

This fun and educational presentation showcases neuroscience-based mental models and psychometrics for fostering the practice of strategic Business Analysis. Each participant will be provided with techniques and tools to take with them to use in their professional practice.

Learning Objectives

- Learning How Mental Models Foster Strategic Business Analysis
- Specific Mental Model Psychometrics and Techniques
- Learning How "Nimble" Relates to Mental Models

Symposium Sessions

Tuesday, October 20

1:15pm - 2:15pm



Career Paths - What will our roles look like in the future?

Vincent Mirabelli
CBAP, CCXP, MBB, PMP,
Love the Process Academy

Hans Eckman
Research Fellow, Info-Tech
Research Group / Eckman Guides

Do you ever wish when sitting in a session that you could just ask your question and get the information you're looking for? If so, then this is the session for you. Our small panel will discuss the topics and situations that concern you the most. Enjoy this high-spirited, often humorous, and informative edutainment panel with some of the top thought leaders I found at breakfast this morning. You drive the content, and we'll make up plausible and often correct answers.

Learning Objectives

- Discuss how traditional project roles will change in Product-centric Agile DevOps.
- Understand the state of the market and what employers are looking for.
- Examine the skills and knowledge domains needed in the future.

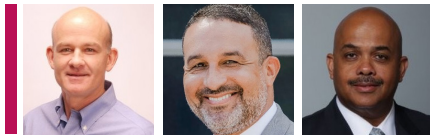


Artificial Intelligence Product Roadmap Vision

Salah Jaber
Agile Coach, Certified Scrum Master,
CPO, PMP, MS, Senior Director of Product
Management, SAI360 Ex Cisco, Dell/EMC

Ipek Guray
Project Manager, PhD Program,
Project Leader Chemical
Engineering, WPI

As Artificial Intelligence continues to evolve, organizations are increasingly looking to integrate AI solutions to drive innovation, streamline operations, and deliver next-generation products and services. This presentation will outline a strategic AI product roadmap vision.



Panel Discussion: Show Me the Money: How AI is Transforming Business Value Estimation

Peter Schwalm
Director Digital Transformation,
National Grid

Shannon Pettiford
PMP, PMI-ACP, CSM, MS in Project
Management, Senior IT Program
Manager, Boston Consulting Group

Anthony Henderson
President, Collaborative Enterprises

Discover how AI is changing the way organizations estimate business value and make investment decisions. This panel explores practical use cases where AI strengthens prioritization, forecasting, and confidence in value estimates—while highlighting where human judgment still matters most.

Learning Objectives

- Apply practical approaches to using AI-assisted insights to prioritize initiatives and justify investments earlier in the lifecycle
- Understand where AI acts as a decision accelerator versus where human judgment and context remain essential
- Identify how AI can augment business value estimation through pattern recognition, forecasting, and scenario analysis

Symposium Sessions

Tuesday, October 20

1:15pm - 2:15pm



The Power of Your Voice: Skills for Crucial Conversations

Elias Mokole

Leadership Communication Consultant, ELM consultants

High-stakes conversations don't fall apart from weak analysis—they unravel when pressure speeds up delivery or explanations spiral. In this practical session, participants learn how pacing, tone, and intent affect whether stakeholders stay with you or tune out. Through focused exercises, attendees gain a repeatable method to prepare so their key message lands cleanly the first time.

Learning Objectives

- Apply a repeatable preparation method before crucial stakeholder interactions
- Apply a repeatable preparation method before crucial stakeholder interactions
- Adjust pacing, tone, and intent to improve understanding under pressure

Workshop Descriptions

Wednesday, October 21

9:00am - 3:00pm

DELIVERING VALUE THROUGH OPERATIONAL EXCELLENCE

Shannon leads this interactive session focused on elevating operational performance through process optimization, agile thinking, and data-informed decision-making. Drawing from his extensive experience in project and program management, Pettiford guides participants through actionable strategies to visualize workflows, uncover inefficiencies, and build adaptive systems that align with customer needs.

Learning Objectives

- Construct a customer journey map that integrates

Shannon Pettiford

PMP, PMI-ACP, CSM, MS in Project Management, Senior IT Program Manager, Boston Consulting Group

physical, emotional, and behavioral touchpoints to identify pain points and guide experience-centered operational redesign.

- Apply process mapping techniques to visualize and analyze production workflows, enabling identification of inefficiencies and opportunities for operational improvement.
- Demonstrate the use of agile prioritization frameworks (e.g., MoSCoW, Value-Driven Delivery) and empathy-based design methods to foster innovation, optimize team focus, and deliver high-impact outcomes.

REMAIN IRREPLACEABLE: MASTER THE HUMAN SKILLS TO LEAD IN AN AI-POWERED FUTURE

The rise of Agentic AI and hyper-automation is the next revolution, automating tasks, accelerating service delivery, and reshaping how we define success. But even as technology takes on more of the routine, the most valuable organizational skills remain deeply human. Future-ready thought leaders will stand out not by competing with AI, but by mastering the capabilities that machines can't replicate and partnering with AI on low-value/high effort activities.

*laptop required for this session

Learning Objectives

- Exercise Empathy and Ethical Judgment:

Hans Eckman

Research Fellow, Info-Tech Research Group / Eckman Guides

Understand stakeholder needs, anticipate potential unintended consequences, and make informed, nuanced decisions grounded in ethics, equity, and the impact on your organization's vision and goals.

- Think Strategically and Critically: Elevate from managing tasks to shaping vision. Develop the ability to connect AI capabilities to business outcomes and navigate ambiguity in ways algorithms cannot.
- Communicate with Influence: Translate complex AI-driven insights into compelling stories that inspire action, gain buy-in, and bridge the gap between technical and business worlds.

Workshop Descriptions

Wednesday, October 21

9:00am - 3:00pm

THINK SMARTER, NOT HARDER: BRAIN-HEALTHY STRATEGIES FOR COMPLEX PROJECTS USING STRATEGIC MEMORY AND ADVANCED REASONING	Jennifer Bedell CBAP, SAFe POPM, FLMI, ACS, Senior Business Analyst / Community Leader, Mariner Innovations Trent Leopold Analyst, University of Texas
This workshop equips you with techniques proven by neuroscience to enhance your strategic thought processes while enhancing your brain health. You have only one incredibly powerful brain, and this workshop will provide you with practices for caring for your brain while also unleashing its potential to help you and your stakeholders. Learning Objectives Enhance Reasoning Skills: Develop advanced	tactics for navigating complex, transformational objectives with clarity and precision. - Apply Brain-Healthy Strategies: Discover neuroscience-backed practices to boost mental performance and resilience. - Master Strategic Memory Techniques: Learn how to efficiently retain and recall information for better project management and decision-making.

USING GENERATIVE AI TO BUILD YOUR BA DELIVERABLES	Jamie Champagne CBAP, PMP, Champagne Collaborations
Generative AI can strengthen business analysis when applied with structure and discipline. This hands-on workshop shows how to integrate AI into real BA tasks using structured prompts and critical thinking. Learn to refine outputs, align results with business goals, and produce work-ready deliverables that enhance clarity, efficiency, and analytical rigor.	Learning Objectives - Apply structured prompting techniques to support real-world business analysis tasks - Integrate generative AI responsibly to enhance deliverable quality and efficiency - Evaluate and refine AI-generated outputs to ensure alignment with business standards

Thursday, October 22

9:00am - 3:00pm

AI ESSENTIALS FOR PROJECT MANAGERS AND BUSINESS ANALYSTS: AN INTRODUCTORY WORKSHOP	Jamie Champagne CBAP, PMP, Champagne Collaborations
This six-hour introductory workshop provides project managers and business analysts with a foundational understanding of AI, its applications, and hands-on experience with AI tools. Workshop will cover the basics of AI and its use in various industries, how AI streamlines processes and enhances decision-making, articulating AI's business value and creating compelling cases and hands-on practice with interactive demos and practical exercises with AI tools. *Bring your laptop for interactive demos and exercises. Work will be online, with guidance on tools, security, and customization for your needs.	Some activities can be done via a mobile browser, but laptops ensure the best experience. Learning Objectives - Identify and utilize AI tools to improve efficiency and decision-making while practicing with basic AI applications. - Explain the basics of AI and its relevance to business and its applications. - Build a business case for AI within their organization.

Workshop Descriptions

Thursday, October 22

9:00am - 3:00pm

HAMMER IT HOME! UPDATE YOUR BA TOOLBOX - WORKSHOP EDITION

Jennifer Bedell

CBAP, SAFe POPM, FLMI, ACS, Senior Business Analyst / Community Leader, Mariner Innovations

Business Analysts use a variety of tools and techniques every day. Sometimes, we don't even realize we are using a tool or technique because it comes so naturally. In fact, you might be using outdated techniques because you didn't realize there was a better way. Or because you didn't have the time to investigate. In this session, you will learn and practice updated BA tools and techniques that will help you "build" the right solution for your

stakeholders (and not limit yourself to the solution they requested).

Learning Objectives

- New ways to use existing tools and techniques
- Increased confidence and ability to use timeless tools & techniques
- Shiny new techniques to round out your workshop

HANDS-ON WORKSHOP: ENHANCE COMMUNICATION BY VISUALIZING DATA IN CONTEXT

Scott Helmers

Hands-on Workshop: Enhance communication by visualizing data in context

Clear communication is the essence of the work we do. But we live in a data-driven world and our data isn't always clear. What if you could leverage readily available software to present data more effectively and generate insights more easily? That's the purpose of this hands-on workshop: create actionable data visualizations. Bring a Mac or PC; we'll provide licenses that run in any browser. In

addition to creating your own reports, you'll work with real-world examples from customer projects.

Learning Objectives

- Add context to data visualization to generate insights more rapidly
- Empower decision makers with actionable data
- Leverage readily available software

THE ACHIEVE MORE BY DOING LESS WORKSHOP!

Hans Eckman

Research Fellow, Info-Tech Research Group / Eckman Guides

There's too much work to do. I can't keep up. This is why so many of our teammates are burning out. What if I told you that our work habits were making things worse? We're accepting all requests instead of prioritizing ones with high ROI and switching costs are reducing productivity. Stop the Insanity! Discover ways to improve productivity and value delivered. Recognize what is important, how to stop or delegate what isn't, and how to recognize the difference.

Learning Objectives

- Learn to recognize and correct inefficient behaviors
- Learn how some of our best intentions are counterproductive
- Learn cheat codes and techniques that can streamline and automate unimportant tasks

ASSOCIATION PARTNERS



Serving Massachusetts, Rhode Island, New Hampshire, and Maine, the International Institute of Business Analysis (IIBA) Greater Boston Chapter was the first U.S. chapter established in March 2005. We currently have approximately 150 members and are actively seeking to grow this number. Our chapter is one of a rapidly growing international base supported by the overall IIBA organization. The goal of the Greater Boston Chapter is to advance the mission and objectives of the IIBA at the local level and to raise the profile of the Business Analyst role by promoting best practices and standards among like-minded Business Analysis professionals. An integral component of our chapter is ongoing learning and knowledge sharing. This is accomplished through presentations, seminars, and activities hosted by the chapter.

PMI Mass Bay

2026/2027 CONFERENCES

