

CASE 3

# AI for Project Managers - Case 3

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# Where we are

You learned that the way you structure and provide information to AI fundamentally changes what it can do for you.

CASE 1

1

2

CASE 2

NOW: CASE 3

3

It showed that AI produces technically correct but incomplete plans without local and regulatory context. Your role is to provide real-world conditions.

We take the next step.



2026

Introduction to the case

# AI and Project Management: What's Happening in 2026



# The question we've all asked ourselves

You've heard that "AI is going to manage projects for you." That you can set up an agent, give it access to your tools, and head to the beach.

Is that true for project management?

We've analyzed the technical documentation, pricing, and real-world implementations of the main vendors.

# The promise

Monday.com has a feature literally called "AI Project Manager".

ClickUp

"Autopilot Agents" that  
"monitor, decide, and act  
across your projects"

Motion

"AI Employees"

Taskade

"autonomous AI agents"

All of them promise to automate project tasks: assign, prioritize, update, detect blockers.

But the naming suggests something more. "Project Manager." "Autopilot." "Employees." Those words are not accidental.

# The confusion

## What many people think

Managing a project is making reports, chasing tasks, updating the schedule, and coordinating meetings.

If that were all, AI would already be replacing us.

## The reality

Managing a project is making decisions with incomplete information, negotiating with stakeholders who have opposing priorities, resolving conflicts on the team, and adapting the plan when everything changes halfway through.

AI automates the stuff on the left, maybe. **What's on the right is still ours.**

# Quick check: What kind of AI are we talking about?

## Predictive AI

Netflix has used AI since 2013 to recommend what you'll watch next. That's **predictive AI**: it finds patterns in data and makes predictions (you liked X, so you'll probably like Y).

## Generative AI

ChatGPT, Claude, and Gemini are **generative AI**: they produce new content (text, images, code) based on your instructions.

📌 Different capabilities, different limitations. When someone says "AI will replace PMs," ask them: **which AI?**

# So, where is AI actually in project management?



## Simple automation

If the task is completed → update dashboard. *This has existed for 20 years.*



## Smart automation

AI suggests who to assign a task to based on workload. *Most current PM tools.*



## Decision support

AI analyzes and suggests, but you always decide. *What you just did.*



## Real autonomy

AI makes important decisions and executes them without consulting you. *This does NOT commercially exist yet...*

# The test no tool passes

Can your AI tool manage a 10-person project for one week without human intervention?

That includes:

Someone on the team gets sick and tasks need to be reassigned

Two departments fight over the same resources

The budget runs over and you have to decide where to cut

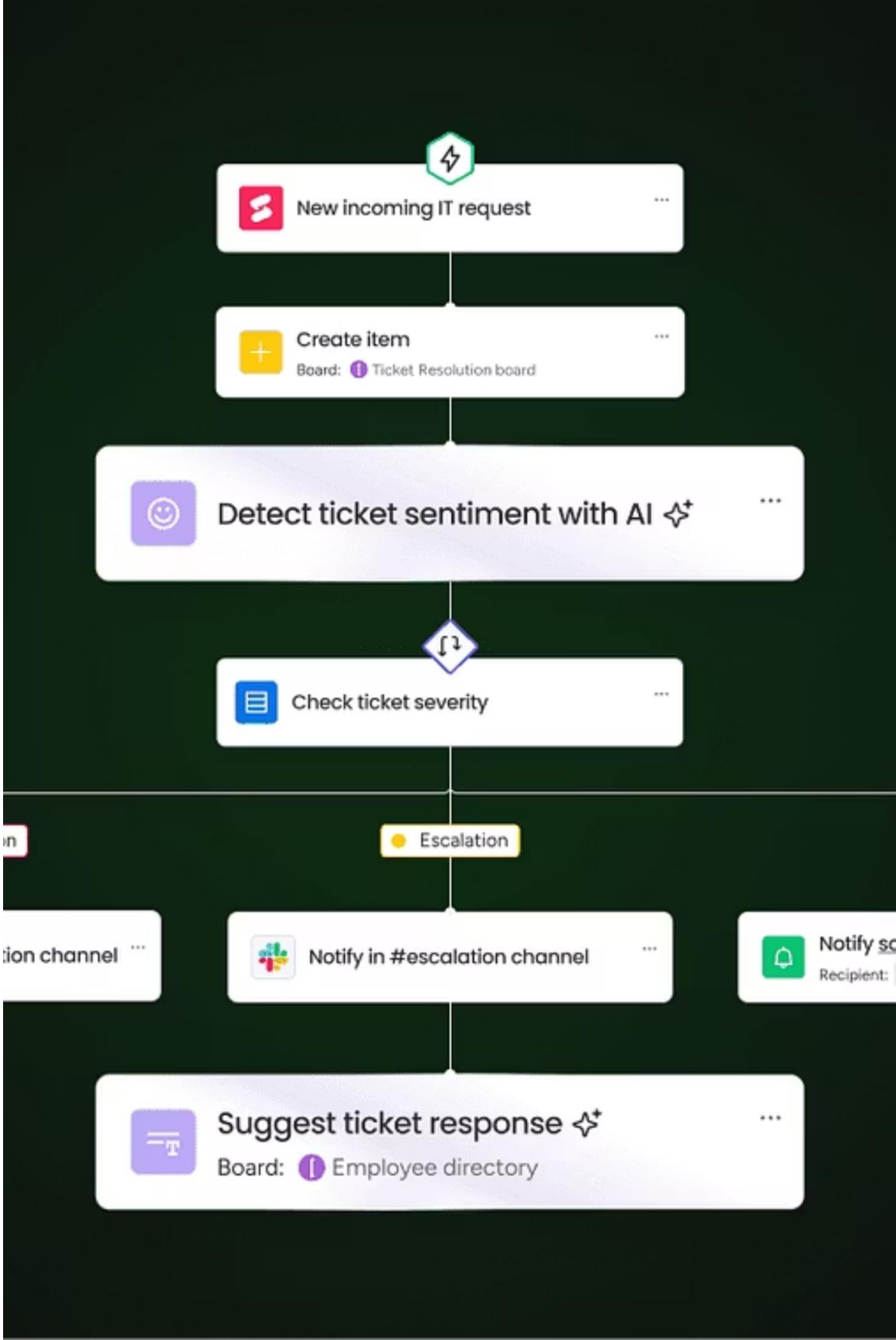
An technical blocker appears that no one anticipated

A misunderstanding creates friction on the team

📄 **Result: No commercial tool has passed this test. Not in 2025 or 2026.**

# What they actually do

Tool	What it actually does
ClickUp Brain	Every action requires human-defined rules
Monday.com	Trigger-based automation with content generation
Motion	API and webhook configurations
Taskade	Users describe it as "templates with AI features"



# The 4 real categories

When someone says "AI for project management," ask: which of these four?

Category	Does it exist?	Example
<b>Truly autonomous:</b> makes and executes decisions without human approval	<b>EMPTY. None exists.</b>	-
<b>Human-triggered automation:</b> "if-this-then-that" workflows dressed up as AI	Most of the market	ClickUp, Monday.com
<b>Assisted decision-making:</b> analyzes data and recommends, you decide	The most honest and best ROI	EpicFlow, Copilot
<b>Vaporware/Marketing:</b> works in demos, falls apart in production	More common than we think	-

📄 The "real autonomy" category is still empty as of early 2026...

# McDonald's + IBM (2019–2024)

If you think the previous test is too demanding, consider this:

McDonald's and IBM spent **5 years and millions of dollars** developing AI to take orders in the drive-thru.

The task seemed perfect: limited menu (~50 options), short conversation (30-60 seconds), a single stakeholder (the customer), immediate feedback.

**The result?** The system asked for 260 chicken nuggets instead of a burger. It added random items. It didn't understand accents. McDonald's canceled the project in June 2024.

If they couldn't automate ordering a hamburger in 5 years, what does that say about "AI agents that will manage your projects"?



# Morningstar + Asana Intelligence

The best documented case. Asana's AI Visionary 2025 award.

**14,976**

**Annual hours saved**

**\$600K**

**Estimated savings**

**11,000**

**Employees**

29 countries

## What did they automate?

Request intake, content generation, task routing across teams.

## What are people still doing?

Deciding priorities, resolving conflicts between departments, allocating resources, deciding what goes on the roadmap.

📄 The most award-winning AI success case in project management is automation of administrative tasks.

# VieCuri Medical Center + EpicFlow

**The organization:** Dutch hospital, 3,000+ employees, IT department.

**Implementation time:** 8 years (yes, you read that right, 8 years)

**The initial problem:** The hospital sent requests for hundreds of IT projects, but the team could only handle 10 in parallel. No one knew which one to prioritize.

**The solution with EpicFlow:**

Predictive analysis of bottlenecks

"What-if" simulations with different scenarios

Data-driven visualization of future capacity

**The CIO says:** "EpicFlow allows us to see the future"

# VieCuri: Where the Value Lies

What AI does in EpicFlow:

## **Predicts:**

"If you accept these 5 new projects, in 3 weeks you will have 40% overload"

## **Simulates:**

"If you hire 2 more people, you could complete 3 additional projects this quarter"

## **Detects:**

"Resource X is at 180% capacity, there are issues"

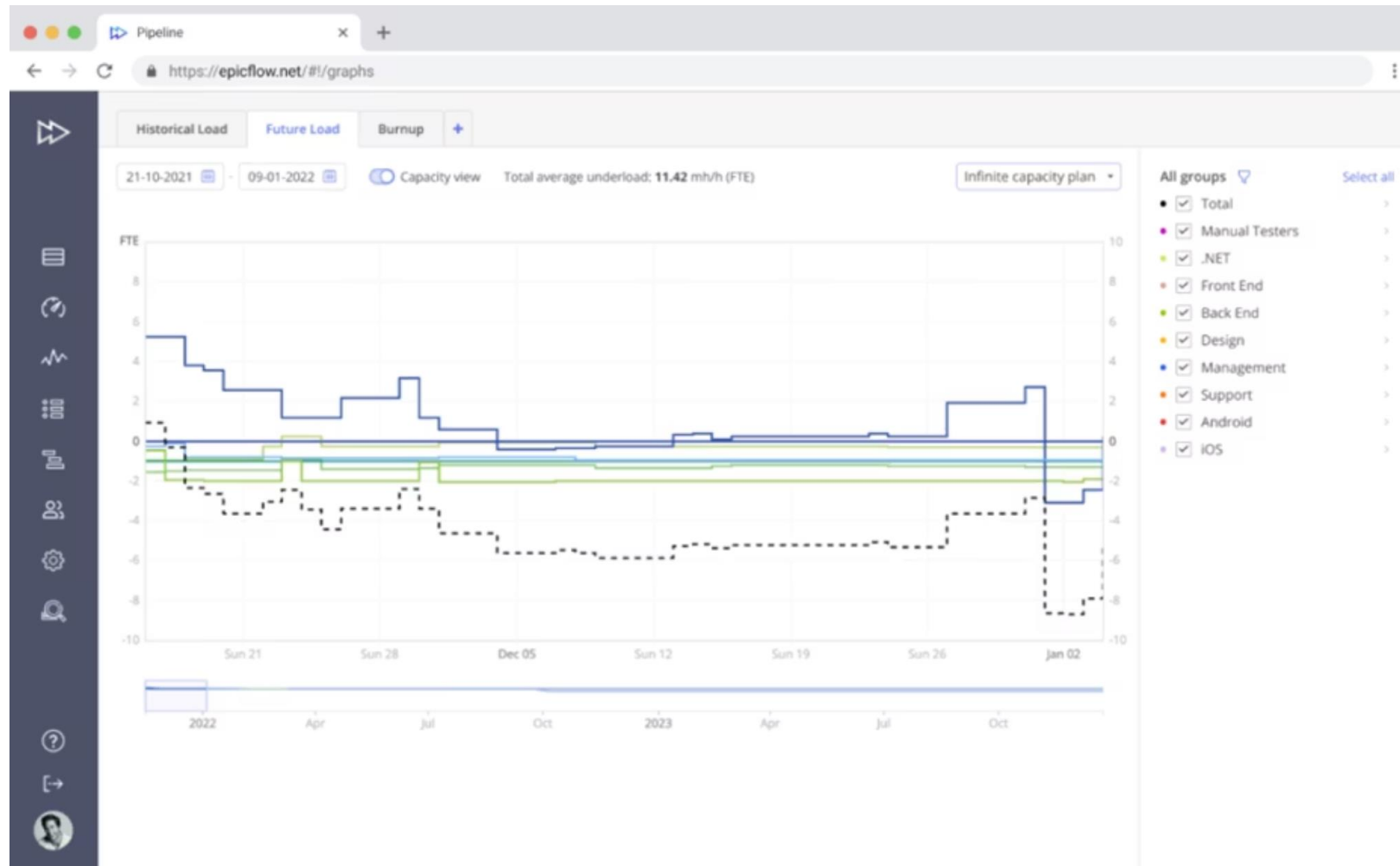
What it DOES NOT do:

- AI does NOT decide which projects to accept
- AI does NOT decide who to hire
- AI does NOT decide how to resolve bottlenecks

**Humans** make all those decisions, but with MUCH better information.

**The key:** 8 years of evolution. It is not something you implement in a month.

# EpicFlow's Future Load Graph uses AI-powered resource planning for balanced workloads.



The tool automatically predicts demand levels based on all project-related data and highlights dangerous overloads for other resources and even resource groups.

# Documented Cases

The best documented cases. Notice WHAT they automated:

Tool	Real capability	Verified limitation	Approx. cost
ClickUp Brain	20 min saved on 60 min tasks	Setup can take longer than the savings	\$50+/user/month
Monday.com	Trigger-based automation	Users back out because of cost vs value	\$200/month after credits
Asana Intelligence	\$600,000 saved at Morningstar	AI handles intake and forms, humans decide	Not specified
EpicFlow	Prediction and "what-if" analysis	<b>8 years of implementation,</b> human decisions	Enterprise

None of these cases is "AI managing a project." These are cases of automation of administrative tasks within organizations that have projects.

# The 2026–2027 horizon: from automation to agency

After chatbots (2024) and workflow assistants (2025), this is what is being talked about now:

## AI agents

Claude Code, Claude Cowork, and similar

## MCP protocol

The open standard that connects AI with your tools

## n8n

Visual automation with integrated AI

But what is each thing? Because everything gets mixed together.

## Copilot

Responds when you ask it (ChatGPT, Claude, Gemini)

## AI workflow

You define each step; the AI executes a specific node within the flow (n8n, Make, Power Automate)

## Agent

You define the boundaries and the tools; the agent decides what to do and in what order (Claude Code, Cowork, MCP)

This transforms the PM role. It doesn't eliminate it; it expands it.


# The PM in the age of AI agents

The PM still manages people: developers, designers, stakeholders. That doesn't change.

A new layer is added: **overseeing agents that execute subtasks once delegated to people.**

The PM becomes the manager of a **hybrid team (humans + agents)**, which requires:

- 1** Define precise instructions for agents
- 2** Validate outputs with judgment, not assume they are correct
- 3** Manage the risk of errors at scale: a poorly instructed agent repeats the error across all instances
- 4** Keep human oversight as an essential quality control

 **Agents can make systematic errors that are difficult to detect. Supervision is not optional.**

# MCP: the universal connector for agents

The Model Context Protocol (MCP) is an open standard that is enabling AI to integrate with real tools.

## Before (without MCP)

N x M custom integrations

## With MCP

A universal protocol

**Result:** Agents that operate directly in your PM tools

Tools with MCP servers: Jira, Asana, Notion, Monday.com, Linear, Slack, Google Workspace...

Imagine asking an agent: "tell me the status of all blocked tasks in this sprint" and having it connect via MCP to Jira, Slack, and your CRM to give you a prioritized action plan.

The data access problem is being solved. The judgment problem remains intact.

# n8n for PMs: automation with integrated AI

n8n is not an agent platform. It is a visual automation tool where AI is just one more node inside a flow that you design.

Key distinction: AI does not decide the flow. It executes a specific step within it.



## AI node workflows

You insert LLM calls as steps within a flow that you define



## Human-in-the-Loop

Pause the flow at critical points so a person can review and approve



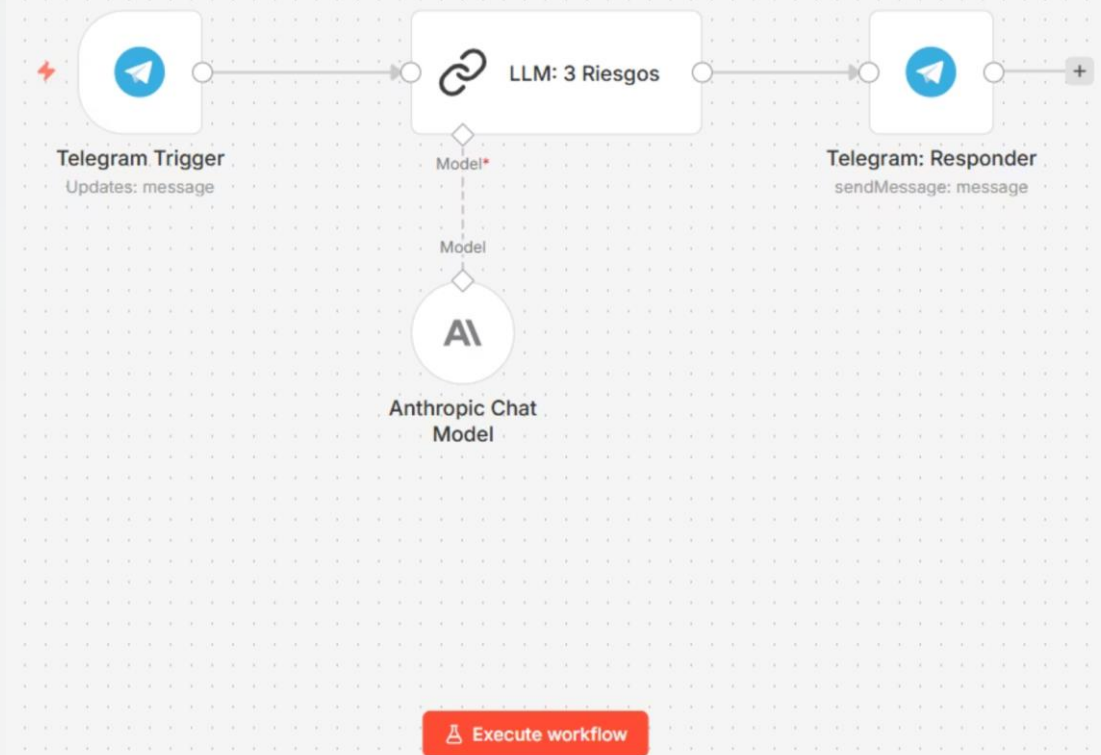
## Integrations

Native connection to Jira, Asana, Notion, Monday, Slack, Google Workspace, and 500+ tools



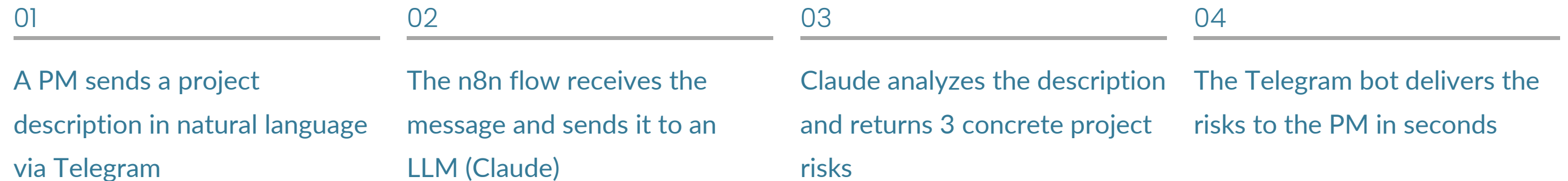
## 24/7 operation


Flows run on a server, triggered by events. They do not depend on anyone leaving a laptop open



# Live demo: project risk bot

A real n8n flow that works right now. How it works:



 Try it yourselves now if you want. Telegram: [@projectriskbot](https://t.me/projectriskbot)

No code. No enterprise license. A PM who understands risks + an automation tool + an LLM = immediate value.

# "Skills": PM methodology codified for AI assistants

A **skill** is an instruction file that teaches an AI assistant how to reason about a specific domain. It is not a generic prompt. It encodes **practitioner judgment**: frameworks, anti-patterns, failure modes, and uncomfortable questions an experienced PM would ask.

The same prompt, two results:

"Generate a project charter"

## Without skill

Generic template, pretty decent but generalist. You trust the tool to "know PM."

## With PM skill

Adapted to your standard. Complete charter from the briefing, with stakeholder analysis, conflict detection, risks with response strategies, and a financial snapshot showing pressure points.

# project-management-skills: open-source repository

[github.com/marcbara/project-management-skills](https://github.com/marcbara/project-management-skills)

## 1 Agent with 3 workflows (Claude Code)

### **/plan-project**

End-to-end full planning

### **/health-check**

Project health diagnosis

### **/takeover**

Takeover protocol with document analysis and a 30-day plan

## 4 Skills with 18 commands

### **project-charter**

Charters, stakeholder analysis, risks, budget

### **document-analysis**

Consistency across documents, gaps, contradictions

### **scope-management**

Scope definition, WBS with the 100% rule

### **schedule-management**

Critical path, crashing, export to MS Project

# Manifesto, v1.0

"The project manager's job is to deliver through people, not fill out templates."

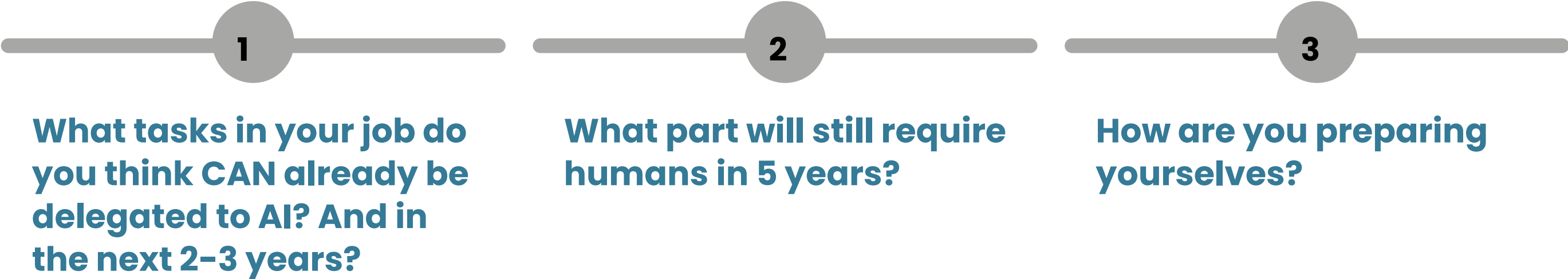
For decades, producing management artifacts consumed so much of the PM's time that it displaced the rest of the practice. Not because we believed that was all the work, but because someone had to do it, and that someone was us.

That excuse is gone. The question is no longer how to produce these artifacts faster. It is: **what are you doing with the rest of your day?**

- 1** AI speeds up the production of artifacts, nothing more.
- 2** A risk register is not risk management.
- 3** A status report is not communication.
- 4** A stakeholder matrix is not engagement.
- 5** A Gantt chart is not schedule control.
- 6** **The work is the people.** The difficult conversations, the politics, the value judgments: no model can do this.

# Debate

Based on everything we've seen:



# Irreplaceable PM Elements (For Now)

After everything we have seen, there are capabilities that current AI simply does not have:



## Managing complex stakeholders

- Reading organizational politics
- Building trust in times of crisis
- Navigating conflicting interests
- Adapting communication to the audience



## Decision making under uncertainty

- Deciding with incomplete information
- Weighing qualitative factors
- Evaluating ethical dilemmas
- Intuition based on experience



## Creative problem solving

- Finding novel solutions
- Adapting to unprecedented situations
- Thinking "outside the box"

# Conclusions: The Pragmatic Reality

## What AI CAN do in PM today:

- Automate repetitive administrative tasks ✓
- Generate document drafts ✓
- Detect patterns and predict risks ✓
- Process and summarize information ✓
- Suggest data-driven decisions ✓

## What it CANNOT do (and maybe won't soon):

- Manage organizational politics X
- Build trust with stakeholders X
- Make complex ethical decisions X
- Creatively adapt to the unexpected X
- Replace experienced human judgment X

**The future is not "AI vs Humans"**  
**It is "Humans augmented by AI"**

# Resources for Further Reading

## **Bara, M. (2025)**

"Investigating the autonomous AI project management market: Reality check 2025."  
<https://medium.com/@marc.bara.iniesta/investigating-the-autonomous-ai-project-management-market-2025-reality-check-420192322514>

## **Bara, M. (2026)**

"What startups get wrong about AI: Notes from 30+ mentoring sessions."  
<https://medium.com/@marc.bara.iniesta/what-startups-get-wrong-about-ai-notes-from-30-mentoring-sessions-7143ac45c4ca>

## **Bara, M. (2026)**

"Forecasting the unforecastable: How the illusion of AI prediction makes black swans more dangerous."  
<https://medium.com/@marc.bara.iniesta/forecasting-the-unforecastable-how-the-illusion-of-ai-prediction-makes-black-swans-more-dangerous-bb8dfc5094b4>

## **Gartner Inc., 2019**

"Predicts 2020: AI and the future of project management."

## **McDonald's Corporation, 2024**

"Discontinuation of AI-based drive-thru ordering system." Official statement, June 2024.

MIT Research, 2025. "Generative AI Implementation Failure Rates in Enterprise Environments."

Gartner Inc., 2019. "Predicts 2020: AI and the Future of Project Management."

McDonald's Corporation, 2024. "Discontinuation of AI-Powered Drive-Thru Ordering System." Official statement, June 2024.

Real-world implementation challenges: [https://medium.com/@info\\_14390/i-let-ai-manage-my-projects-for-a-week-heres-why-it-didn-t-work-654b7be744b9](https://medium.com/@info_14390/i-let-ai-manage-my-projects-for-a-week-heres-why-it-didn-t-work-654b7be744b9)

ClickUp Brain features and limitations: <https://clickup.com/brain> and <https://help.clickup.com/hc/en-us/articles/20686299081879-ClickUp-AI-feature-availability-and-limits>

Monday.com AI capabilities: <https://monday.com/w/ai> and <https://support.monday.com/hc/en-us/articles/11512670770834-Get-started-with-AI>

Asana Morningstar case study: <https://asana.com/case-study/morningstar>

## Case 3

# "The stakeholder doesn't read your prompt"

Dr. Marc Bara





# The exercise

You have the Can Rigalt scope statement and the WBS it generated in Topic 3.

Now you will ask the AI to generate a **Stakeholder Engagement Plan** from both documents.

Use the provided mega-prompt.

# What to Expect from the Result

The AI will give you a plan that includes:

## Stakeholder map

With interests and influence power

## List of engagement actions

Meetings, emails, formal requests, reports, calls...

## The order


In which they should occur

## The resistances

That it may encounter

## Recommended channel

For each action

 Read it with a critical eye. It is a draft, not a final product.

# Review your plan

The AI has given you engagement ideas. Now it's time to review them with professional judgment:

- **Do the actions make sense for this project?**

- **Is the sequence correct?**

- **Are the channels appropriate for each stakeholder?**

- **Is anyone important missing?**

Adjust, reorder, and discard what does not fit. **The plan is yours, not the AI's.**

# And then: to execute

The AI generates the plan. You review it. You execute it.



**The AI generates**

**You review**

**You execute**

 **The plan tells you WHAT to do, WITH WHOM, and WHEN.**

Execution is yours. It requires your interpersonal skills.

- Call the contractor and negotiate deadlines
- Write an email to the Ajuntament with the appropriate tone
- Meet with the architect and align expectations without creating conflict
- Convince the client not to cut back on the facade
- Inform the neighbors before they complain



## Round 1 – In groups (5 minutes)

**1**

**How many engagement actions has the AI proposed before construction begins?**

**2**

**Of those, how many require direct interaction with people (in person, by phone, video call) without AI in between?**

**3**

**The first action it proposes: do you agree that it should be the first?**

**4**

**Is there any stakeholder missing who should be included?**

# Round 2 — Group Share-out

Each group shares their responses.

**Do you agree on the first action?**

**Did anyone find a stakeholder that the others do not have?**

**Did the AI give everyone the same plan, or are there differences?**



# The Lesson from Case 3

AI gives excellent engagement ideas. But an unexecuted plan is worthless.

**Reviewing it is your responsibility.**

**Executing it (with a call, an email, a meeting, a negotiation) is where your professional judgment and interpersonal skills come in.**

**That cannot be automated.**

 **Next class:**

# n8n for Project Managers: Practical Workshop