



# AI for Project Managers

## Case 4 · AI in a Process: Putting AI inside workflows

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# Where We Are in the Course

01

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## Case 1: Feed the Machine

You fed AI documents and got back a sponsor briefing.

02

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## Case 2: Technically Correct, Wrong in Practice

You generated a WBS that looked perfect and missed the regulations.

03

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## Case 3: The Stakeholder Doesn't Read Your Prompt

You generated a stakeholder engagement plan, then realized the plan only works if a human makes the calls.

04

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## Today

You'll stop typing into a chat and start putting AI inside a workflow.

# The Leap

## **AI in a Window**

What you have been doing in the first three sessions: you open a chat, type a question, read the answer, close the tab. Every interaction starts with you.

## **AI in a Process**

The same model called from inside a workflow. A form collects data, the AI processes it, the result is written somewhere. You don't have to be there for any of it.

**That's what we'll do today.**

# Why This Matters for PMs

## AI in a Window

Your job is to write a good prompt.

## AI in a Process

You also have to decide what **triggers** the workflow, what **data** it pulls from, where the **result** goes, and who gets **notified** when something matters.

- 📘 That extra layer of design work is the part PMs are well placed to do.



# What Is n8n?

n8n is a visual canvas where you wire nodes together. Each node has one job:

## Trigger

Receive an event

## Query

Pull from a database

## Call

Hit an API

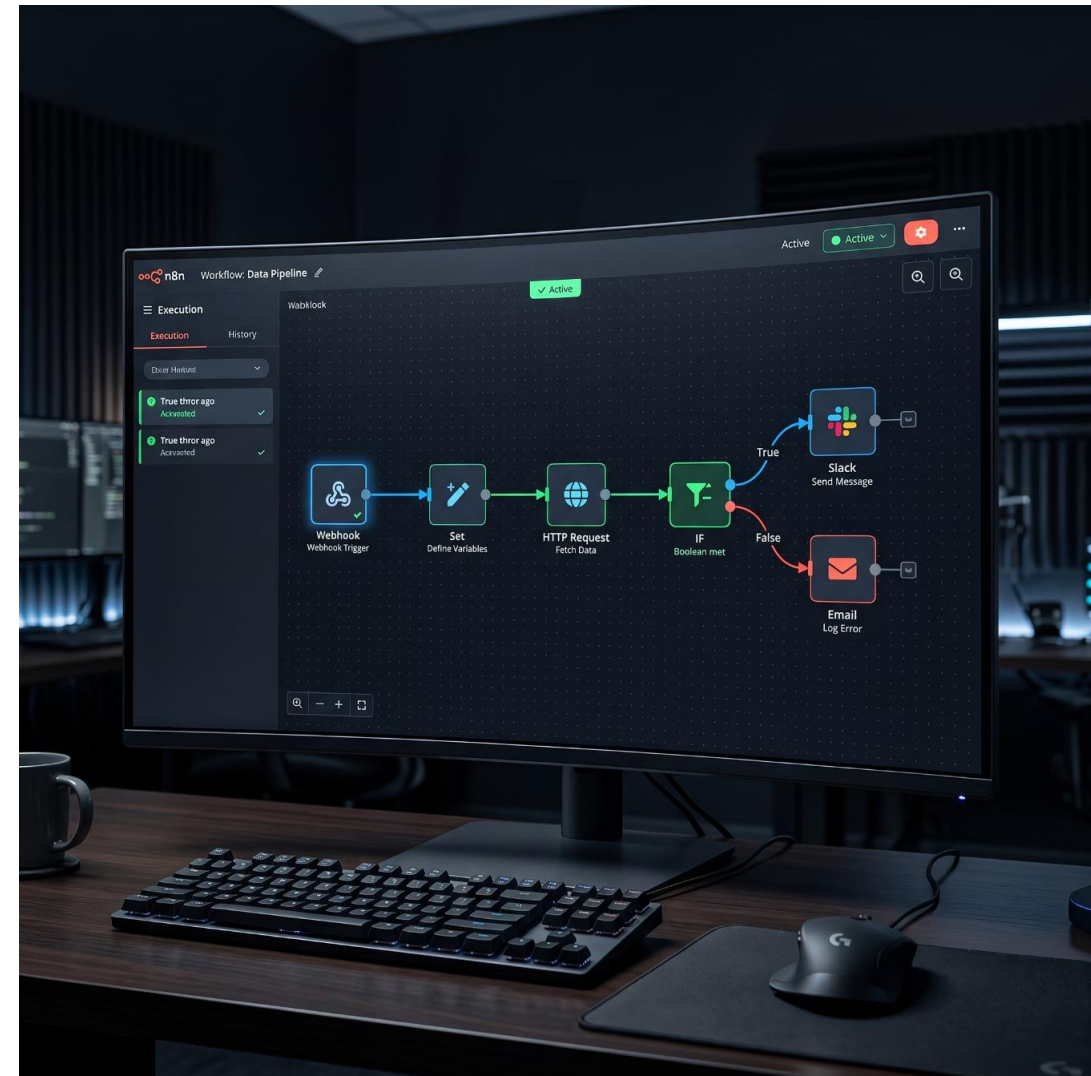
## Ask

Prompt an AI

## Send

Deliver an email

You connect them with arrows and the data flows through. Use it in your browser — no code required. Self-host or use their cloud. The Telegram bot you used last class was an n8n workflow.



# Remember the Telegram Bot from Last Class?

The bot you sent risks to was an n8n workflow. Let's open it and walk through what was actually running every time you typed a message.

 **Live Demo** – Walking through the workflow that powered the Telegram risk bot.

# Live Sheets — Bookmark These

You will see these two Google Sheets fill up during the session.

## Stage 1: Change Requests Register

*Everything your group submits lands here*

[docs.google.com/spreadsheets/d/1IMSwtDJKWpUOA74xKs5XCStVRw8oYxQkfb55AGJPcpE/edit](https://docs.google.com/spreadsheets/d/1IMSwtDJKWpUOA74xKs5XCStVRw8oYxQkfb55AGJPcpE/edit)

## Stage 2: Demo Register + Summaries

*Pre-loaded sample CRs + AI-generated weekly summaries*

[docs.google.com/spreadsheets/d/1wGHZ2WHoTFfKAWPflvIrT2HbhR6txCTZXhEXIy7fcKg/edit](https://docs.google.com/spreadsheets/d/1wGHZ2WHoTFfKAWPflvIrT2HbhR6txCTZXhEXIy7fcKg/edit)

 Both sheets are view-only.

# Your n8n Account

Site: n8n.projectworklab.com

Group	Email	Password
Group 1	<a href="mailto:group01@lasalle.pm">group01@lasalle.pm</a>	AIPM2026
Group 2	<a href="mailto:group02@lasalle.pm">group02@lasalle.pm</a>	AIPM2026
Group 3	<a href="mailto:group03@lasalle.pm">group03@lasalle.pm</a>	AIPM2026
Group 4	<a href="mailto:group04@lasalle.pm">group04@lasalle.pm</a>	AIPM2026
Group 5	<a href="mailto:group05@lasalle.pm">group05@lasalle.pm</a>	AIPM2026
Group 6	<a href="mailto:group06@lasalle.pm">group06@lasalle.pm</a>	AIPM2026

✔ Log in. Two workflows are waiting for you.



# Stage 1: Open Your Workflow

In your group's account you will find a workflow called **Change Request Intake**. It has three key components:

1

## Form

Anyone can submit to it

2

## AI Node

Tags every submission

3

## Register

Writes the result to the shared register

 [Live Demo](#)

# What You Just Saw — Stage 1



## A Team-Facing Intake Form

The contractor lead, the sponsor's office, a team member — anyone in the project can submit a change.

### Consistent Analysis

Each submission gets the same structured analysis from the AI.

### Unified Register

Every result lands in the same register in the same format.

### No Chasing

The PM doesn't chase anyone, because the system handles the collection.

# Stage 2: Now We Go Further

## Stage 1 — Reactive

Processed change requests **one at a time**, whenever someone submitted. Useful, but the PM still had to open the register and read every row.

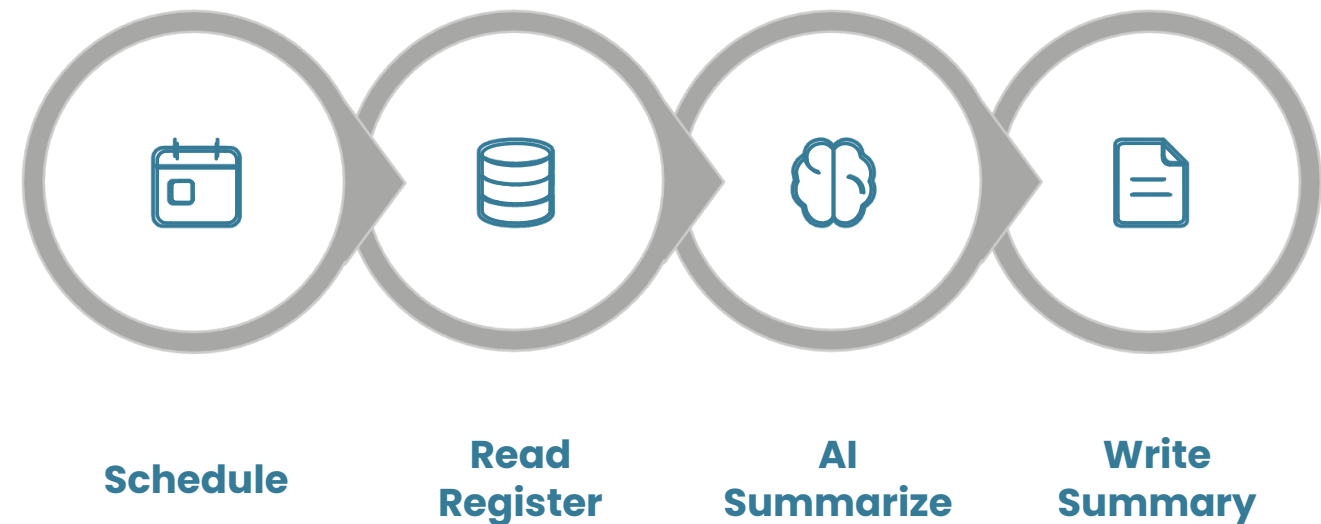
## Stage 2 — Proactive

The AI moves from tagging individual items to **analyzing the whole queue**. It reads everything at once and looks for patterns, conflicts, and what the PM should worry about this week.



# Stage 2: Open the Second Workflow

The second workflow in your account is called **Weekly CR Queue Summary**.



The PM never opens n8n. They open the Summaries sheet Monday morning and read what the system produced over the weekend.

 [Live Demo](#)

# The Two Shifts Between Stage 1 and Stage 2

## The Trigger Changed

A **person** initiated Stage 1 by submitting the form. **Time itself** initiates Stage 2 every Monday morning.

That's the difference between an on-demand tool and an autonomous one.

## The AI's Job Changed

In Stage 1 it processed **one submission at a time**, tagging and structuring.

In Stage 2 it reads the **whole register** and looks for patterns, conflicts, and what the PM should worry about.

*Same model, very different work.*

# Where the Data Goes Is Interchangeable

## Today

The register lives in a **Google Sheet** because it's free and visible.

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## In Your Company

Point the workflow at **Asana, Jira, Monday, Notion, Salesforce**, or whatever your team already uses – that's one node to change.

## The Valuable Pattern



**A Form That Collects**



**An AI That Interprets**




**A Register That Grows**

The valuable thing isn't the Google Sheet – it's this pattern.



# What Would You Build for Your Own Project?

-  Take five minutes in your group and sketch one workflow you would actually use on a project you're working on now or about to start.



## What Does It Collect?

What information or events trigger the workflow?



## Where Does the Result Land?

A sheet, a Slack message, a Jira ticket?

We'll hear one workflow idea from each group.



## What Does the AI Do?

Tag, summarize, classify, flag, or something else?



## Who or What Triggers It?

A person, a schedule, or an event in another system?

# Closing the Course

## Case 1 — Feed the Machine

You fed the AI a briefing pack with internal contradictions and got a clean sponsor briefing. Then you ran a consistency check that surfaced the contradictions the briefing had smoothed over.

## Case 3 — The Stakeholder Doesn't Read Your Prompt

You used a megaprompt to generate a stakeholder engagement plan from the scope and WBS. It mapped out who to contact, in what order, with what message. The plan only works if a human actually does the contacting.

1

2

3

4

## Case 2 — Technically Correct, Wrong in Practice

You used a megaprompt to generate a WBS from a scope statement. The WBS followed PMI standards correctly and ignored the Barcelona regulations that actually govern the project, because nobody had told the AI about them.

## Today — AI in a Process

You used n8n to put AI inside a process: a form that collects change requests, an AI step that tags them, a register that grows over time, and a scheduled summary that runs on its own.

# Going Further on Your Own

If you want to keep exploring after today, the most useful things to look at:



## n8n Templates Library

Hundreds of pre-built workflows you can import and modify.

[n8n.io/workflows](https://n8n.io/workflows)



## n8n Docs

Clean documentation, searchable, with examples for every node.

[docs.n8n.io](https://docs.n8n.io)



## n8n Community Forum

Questions, answers, and people sharing workflows.

[community.n8n.io](https://community.n8n.io)



## n8n Academy

Free official courses, beginner to advanced.

[docs.n8n.io/courses](https://docs.n8n.io/courses)

# A Concrete Next Step

Your group's account stays available after class. Here's what to do:

## 1 Pick a Template

Find a workflow from the templates library that looks useful for your work.

## 2 Import and Run It

Import it into your account and try to make it run.

## 3 Set Up Credentials

You'll need to configure credentials for whatever services it connects to – Gmail, Slack, Notion, etc. The official credentials guide covers every service with step-by-step instructions:

[docs.n8n.io/integrations/builtin/credentials/](https://docs.n8n.io/integrations/builtin/credentials/)

✔ If you get stuck, the community forum is genuinely helpful.



# Thank You

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