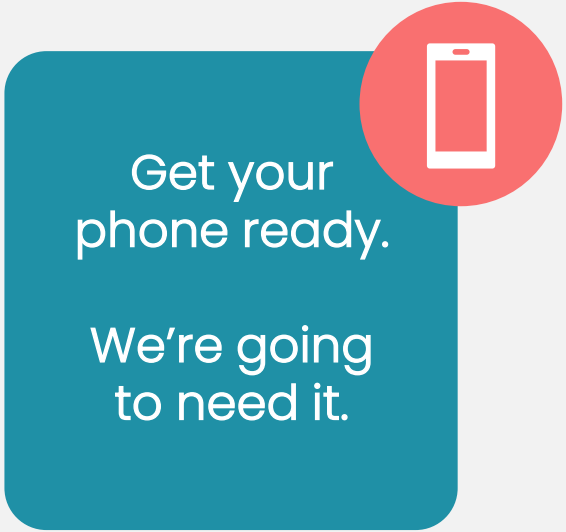
pm-partners

AI for BA Leaders

Closing the gap between rollout and results



BA Leadership Summit Sydney | 12 June 2026

Connect with us on LinkedIn!

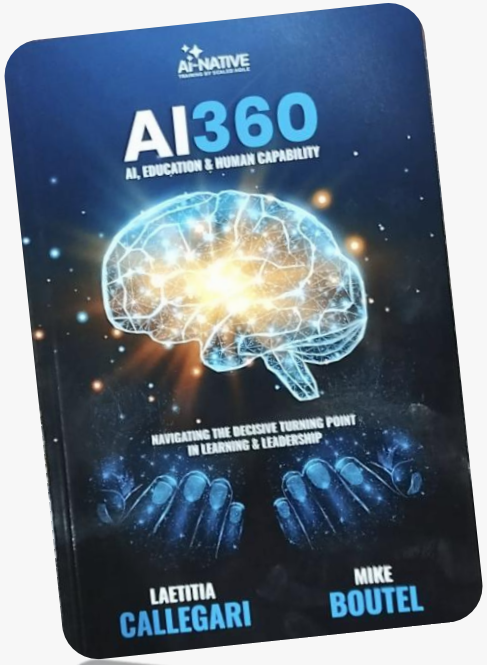


Mike Boutel
Head of Training



Laetitia Callegari
AI Senior Trainer

AI360 | AI, Education & Human Capability



How do we remain genuinely human in environments shaped by intelligent systems?

pm-partners

30
Years in business, brand you can trust

15,000
people trained annually

15+
Years, IIBA ATP and Sponsor

85,000
Resources globally

80%
of the top 200 ASX companies

17.6
Average years' experience of our senior advisors

52%
Of our courses incorporates Agile

$3bn
Projects and programmes delivered annually

16
Best practice global methodologies and frameworks

41
Globally recognised certifications and accreditations

310
Experts across Australia and ASEAN

99%
First time pass rate for certifications

Over to you

What's the single **biggest barrier** to getting **real value from AI** in your organisation?

Scan the QR code



Three things that determine whether AI adoption works

01
Mindset
Do people feel safe experimenting with AI?

02
Usage
Is AI embedded in everyday workflows?

03
Productivity
Can you measure and demonstrate the value?

People know they should use AI. They don't feel safe doing it

78%

of employees use AI frequently when managers actively support it

vs 44% without manager support

80% of employees have serious concerns about at least one AI-related threat

65% worry about being replaced by someone who uses AI better than they do

48% would be uncomfortable admitting to their manager that they used AI

Sources: Gallup Feb 2026 (n=23,717) | HBR Feb 2026 (n=3,000+) | Slack Workforce Index 2024 (n=17,372 incl. AU)

The gap isn't awareness. It's integration.

The lever

88%

use AI frequently when it integrates with existing workflows

vs 55% without integration

The reality

49% of workers have never used AI. Not tried and stopped. Never started.

13% of workers have received any AI training at all.

75% of knowledge workers ARE using AI — just outside official company policy.

Sources: Gallup Feb 2026 (n=23,717) | Pew Research Oct 2025 (n=5,010) | Microsoft Work Trend Index 2024 | Randstad 2024-25

If you can't measure it, you can't defend it

21%

of leaders report significant AI ROI

79%

see productivity gains but only 29% can measure them

42%

of companies abandoned most AI initiatives in 2025

Sources: DataCamp Mar 2026 | IBM Think Circle 2025-26 | S&P Global 2025 (n=1,000+ enterprises)

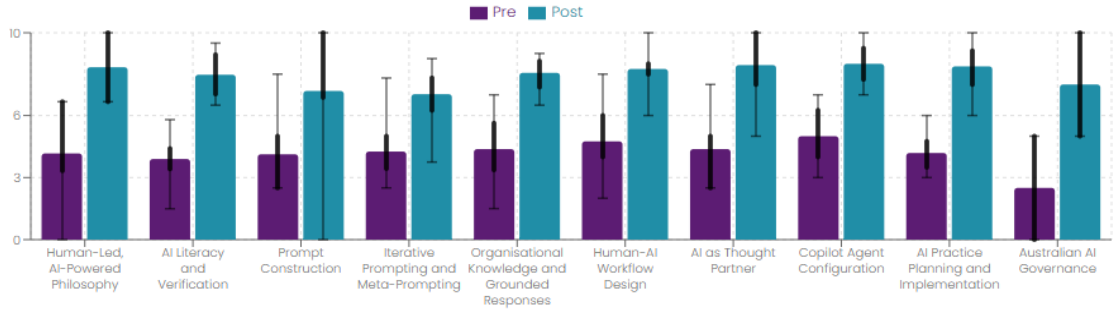
Measuring what matters: Skills uplift

Copilot for Business Productivity

Scores by Question — Pre vs Post

Export CSV

Bar = cohort average · thick line = middle 50% (IQR) · thin whiskers = full range



Transfer Application — Kirkpatrick Level 3

Average score per question · based on 8 respondents

How often do you apply the techniques from this training?

7.3

out of 10 · 8 responses

How confidently are you adapting the prompting techniques from this training to tackle new and unfamiliar work tasks?

6.7

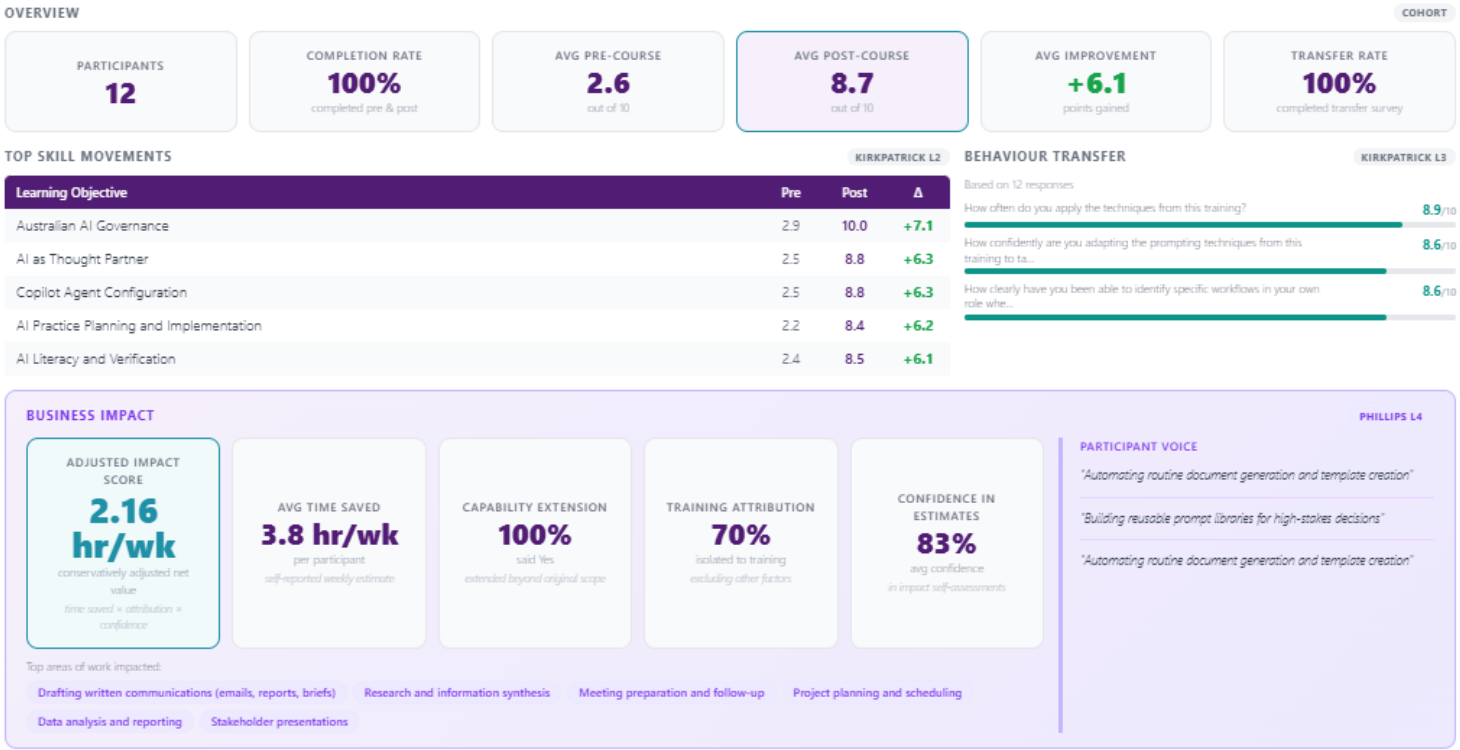
out of 10 · 8 responses

How clearly have you been able to identify specific workflows in your own role where applying Copilot makes a measurable...

7.1

out of 10 · 8 responses

What you'd send to your executive team



Methodology: This report uses the Kirkpatrick Four-Level Evaluation Model (Levels 2–4) and the Phillips ROI Methodology. The Adjusted Impact Score is calculated as: average self-reported time savings × training attribution factor × confidence rating. All estimates are participant self-reported and conservatively weighted. Level 4 data is collected 30–90 days post-training.

Three things to take with you

01

Mindset is the multiplier.

Psychological safety is the single biggest predictor of whether your AI rollout succeeds or stalls. The data now backs you up.

02

Embed, don't bolt on.

Stop training people on AI tools. Start redesigning workflows with AI already in them.

03

Measure before you train.

If you can't show a 'before,' you'll never prove an 'after.' Baseline capability, track behaviour change, estimate impact.

These are on the card on your seat — with a specific first move for each one.

To maximise RoI – focus on people, not the tool

93%

Spending on tech

7%

Spending on people

Sources: Fortune magazine | Bill Briggs, Deloitte's CTO | Dec 2025

INTRO

Build an AI Business Analyst Live

A hands-on workshop for BA practice leaders

pm-partners

What you will build today is free, and yours.

Turning a single agent into an orchestrated team, grounded in your own BA standards and wired into your practice, is the conversation we're here to have.



Before we start

1. Log into the replit app that was e-mailed to you this morning
2. Open Copilot Studio
3. Open HeyGen

Key terms and concepts

1

Artificial Intelligence (AI)

The ability of a computer system to perform tasks that would normally require human intelligence, such as learning, reasoning, and making decisions.

2

Generative AI (GenAI)

An emerging field within AI that creates new content, such as text, images, voice, video, and code, by learning from data patterns.

3

Agents

AI systems that can plan, use tools, and take actions to complete multi-step tasks toward a goal, with limited human direction.

Scan the QR code

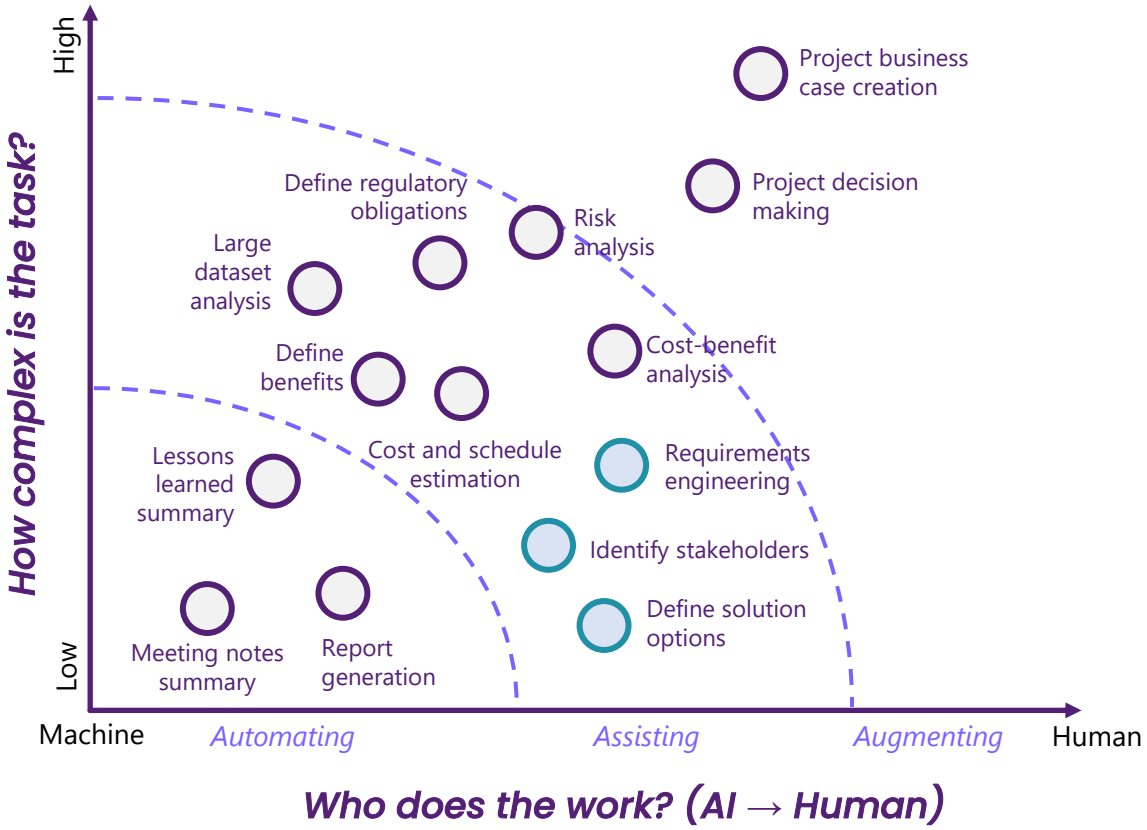
What industry are you in?

How do you use GenAI?



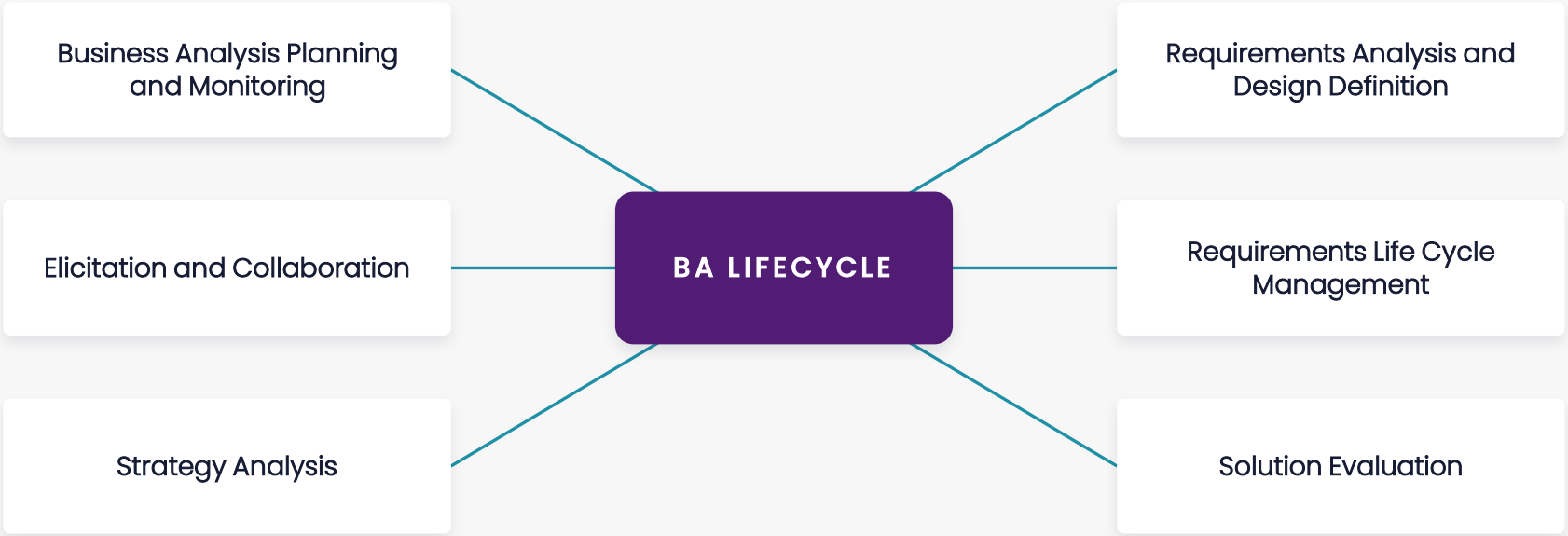
Be open, there are no wrong answers

The level of support GenAI can provide for specific project tasks



Source: PMI AI in Project Management Resource Centre; Transforming Project Management with Generative AI Innovation (PMI, 2025).

Working through the Business Analysis lifecycle



How can you use GenAI across the lifecycle?

In context of BABOK® Guide

Thirteen BA activities, accelerated with GenAI across the case study

- **A01** Creating questions
- **A02** Sponsor answers
- **A03** Creating minutes
- **A04** Problem/opportunity statements
- **A05** Defining benefits
- **A06** Identifying stakeholders
- **A07** Elevator pitch
- **A08** Cost estimate
- **A09** Defining requirements
- **A10** Regulatory obligations
- **A11** Input for models
- **A12** Solution options
- **A13** Addressing concerns

How many of you have approved requirements you weren't confident in?

Because the deadline was coming, and you needed it to keep progressing.

What are we delivering today?

- **Not a general assistant** you re-explain yourself to every time you open it.
- **A purpose-built BA analyst** that already knows the job.
- **In your Microsoft environment** from today.

The plan:

Let’s start with one Agent, a Business Analyst

Requirements in → Orchestrated analysis out → Delivered by your twin

WHY IT MATTERS

Why build your own BA agent?

Today, requirements quality depends on who picks up the work. A purpose-built agent gives every analyst the same senior-level review on demand, inside your own Microsoft environment.

- A quality standard on every requirement, not only the ones a senior happens to review
- Hours back per document: gaps, ambiguities and risks surfaced in minutes
- It already knows the BA job, so there is no re-explaining the task each time

USE CASE

A junior BA drafts requirements for a new payments feature. Before it reaches the architect, the agent flags three unstated assumptions, two missing non-functional requirements and ambiguous approval logic. The BA resolves them in twenty minutes, not in a review meeting two days later.

Watch this.

Building a single-agent - demo

Your turn.

You are about to build your agent

Open Copilot Studio

1. Go to `copilotstudio.microsoft.com`
2. Select **Create** → **New agent** → **Test it** → **Add knowledge & tools**
3. Click **Publish** to chat with the agent

Need help? Ask you IT lead on your table

Type this into Describe, then replace [YOUR INDUSTRY] with your own

```
Build a [YOUR INDUSTRY] BA requirements analyst. When given requirements documents or user stories, assess quality, identify gaps and ambiguities, group clarifying questions by stakeholder type, and write an executive summary with key risks and recommended next steps.
```

Then Create. Name it after your industry. It's already yours. *Keep it instructions-only for now (no file) so it works instantly.*

Your agent is live.

Open it from the sidebar. Look at the suggested prompts.
Now let's see what it can do.

The worst requirements document you'll see today.

Paste this into your agent.

Requirements: Request Submission System

```
The system should allow users to submit requests. Requests need to be
approved by the right person. Users should get notified when
something happens. The process should be fast and the system should
be easy to use. Reports should be available.
```

What came back?

Take a few minutes to read your output.

What did you notice?

1. What did it catch that a quick scan would have missed?
2. How specific was it, or how generic?
3. Would you share this output with a stakeholder as-is?

1 minute, then we hear from a few people

Now try your own.

1

Have your own?

Paste real requirements you are working on right now.

2

No requirements handy?

Use the strategic-initiative sample on the next slide.

3

Then compare

Across your table: different industries, different results.

Or try this one, a strategic initiative. *Sound familiar?*

AI tools rollout: BA Practice Modernisation

The organisation wants to modernise the BA practice by rolling out AI-assisted tools to all business analysts by Q4. Tools should support requirements analysis, stakeholder engagement, and reporting. Leadership wants improved visibility of BA output and measurable quality improvements. Some BAs are uncertain about how AI will affect their roles. Procurement has flagged budget concerns. IT will support whatever is selected provided it is cloud-hosted and passes a security review. The Head of BA notes that previous rollouts struggled with adoption, and this one needs to be different.

An AI BA analyst, analysing the requirements for an AI BA tool.

Table discussion

- What came back from your own requirements: what did it catch?
- Did different industries at your table get different outputs?
- What would this change for a BA team doing this work every day?

05 minutes, then we hear from a few tables

You built the Requirements Agent.



Now watch it join a team of six.


The conversation around AI has shifted.

Why orchestrate a team of agents?

One analyst works the lifecycle in sequence. An orchestrated pod covers it in parallel from a single input, and your role shifts from doing the analysis to directing it.

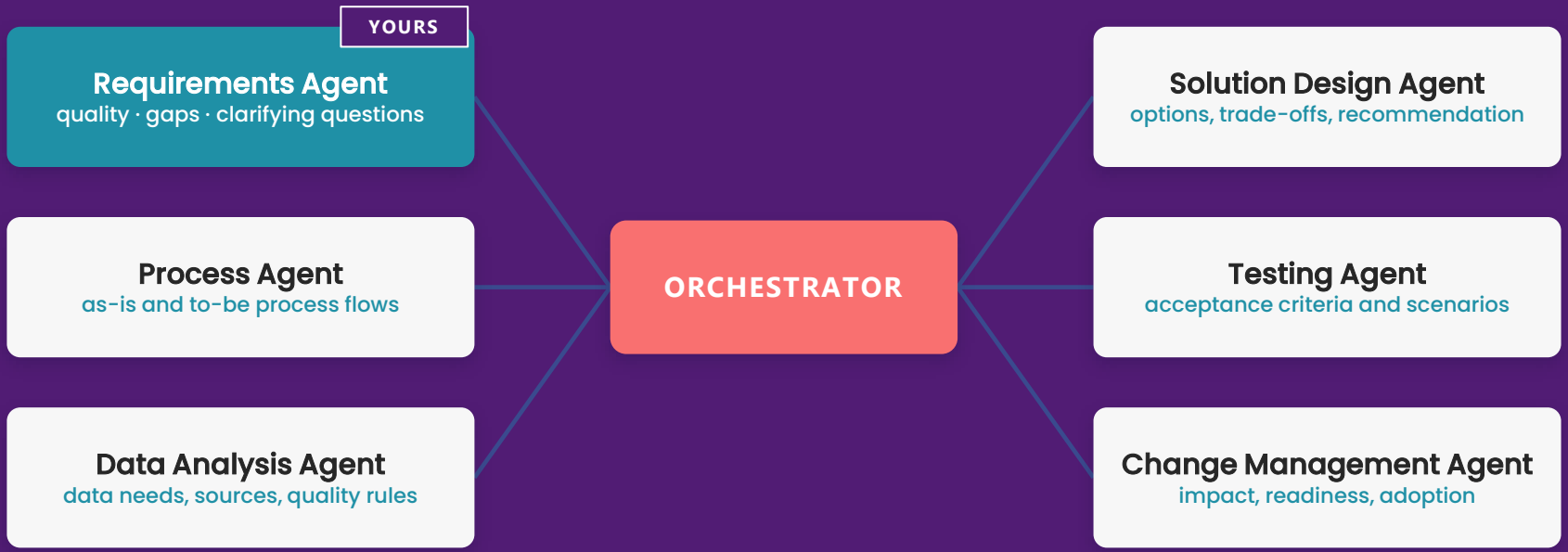
- Full lifecycle coverage in one pass: requirements, process, data, design, testing and change
- A consistent quality floor across every discipline, not just your strongest area
- Capacity to run several projects at once, without adding headcount

USE CASE

A rough one-page initiative brief lands on Friday. Instead of a week of sequential analysis, the pod returns a first-pass package across all six disciplines by Monday. You review and steer, and brief stakeholders the same week.

PHASE 5 · REVEAL

One orchestrator. A team of six BA specialists.



Your Requirements Agent is one of six. One input. No handoffs.

One agent vs. an orchestrated team

YOUR REQUIREMENTS AGENT

- Quality rating
- Gap analysis
- Ambiguity flags with rewrites
- Clarifying questions by stakeholder
- Executive summary

ORCHESTRATED TEAM

Plus five more specialists:

- Process flows and bottlenecks
- Data needs, sources, and quality rules
- Test scenarios and acceptance criteria
- Change impacts and adoption plan
- Solution options and recommendation

From single analyst to orchestration

SINGLE BUSINESS ANALYST

One person, every discipline, in sequence

Requirements, process, data, testing, change and design

Pace and quality bound by one person's time

becomes

→

BUSINESS ANALYST POD LEADER

You orchestrate a pod of six specialist agents

They produce; you review, steer and decide

Judgement, stakeholders and accountability stay yours

Same person. Bigger role. From doing the analysis to directing it.

What does orchestration achieve?

- **Full lifecycle coverage** requirements to solution design in one pass, not one analyst's slice
- **A consistent quality floor** the same standard across every discipline and every project
- **Speed without handoffs** six specialists work from one input, in parallel, with no copy-paste
- **Capacity to scale** one leader can run pods across many projects, without adding headcount

PHASE 6 · SCALE

A brain.
A team.
Now a face.

The plan

Your twin will deliver the executive briefing your agents just produced.



Full circle.

Why deliver through a digital twin?

Your analysis is only as valuable as the number of people who receive it clearly and consistently. A twin lets you brief, onboard and update at scale, in your own voice, without being in every room.

- One consistent message, delivered identically to every project and stakeholder
- Onboarding and method walkthroughs on demand, without repeating yourself live
- Your leadership presence scales across teams, states and time zones

USE CASE

You onboard six new analysts across three states. Rather than running the same method walkthrough six times, your twin delivers it once, identically, on demand. The same recording briefs stakeholders on every project, and your time goes to the questions only you can answer.

Build your avatar

1. **Open HeyGen** sign in to the account you set up
2. **Choose Instant Avatar** record 90 seconds of yourself
3. **No video? Pick a stock avatar** you can still build the whole flow

You can only clone yourself, that's the rule

PHASE 6 · SCALE

Give it the briefing to deliver

Paste a short script, ideally the executive summary your agent produced. Keep it 15 to 30 seconds.

> *“Here is the requirements review for the Request Submission System. Three critical ambiguities need resolution before build, the highest-risk being approval routing. Full analysis and recommended next steps are in your inbox.”*

Generate.

While it renders, watch what a finished one looks like.

That's you, delivering the work

Requirements in. Orchestrated analysis out.
Delivered by your digital self.

CLOSE

You came in as BA practice leaders.

You leave having built your AI analyst and your digital twin.

Come find us afterwards. We're not going anywhere.

Your turn.

Rate your organisation
1–5 on each pillar:

Mindset

How psychologically safe do your people feel experimenting with AI?

Usage

How well is AI integrated into everyday workflows?

Productivity

How well can you measure and demonstrate the value AI is creating?

Scan the QR code



What the room is telling us

Your strongest pillar

Where you're ahead of the curve

Your weakest pillar

Where the biggest opportunity sits

The pattern

All three need to move together for AI to land

Look at your own three scores. Which pillar is your weakest? That's your biggest lever. That's where the most value is sitting.

Go deeper on all three

Copilot for Business Productivity



1 day, completely hands-on

Work with AI tools on real scenarios from your own organisation.

Structured prompt frameworks

For learning design, capability analysis, and learner engagement.

Practical measurement tools

Including the impact assessment approach you just saw.

CPD / PDU eligible

7 PDUs (PMP) or 14 CPDs (CPPP/CPPM/CPPD).

SPECIAL OFFER

Free for everyone in this room!

As part of our partnership with this summit, we're opening up places on this course — at no cost — for every BA leader here today.

Face-to-face

We'll work with you on dates and format that suit your team.

Grab your spot

Scan the QR code



Scan the code or use the card on your seat.

Put your details in and we'll be in touch next week to lock in your spot.

Thank you — enjoy.

The complete AI Capability Program for Australian professionals

Four courses. One program. The most complete AI training suite in Australia.



COURSE 1

Copilot for business productivity

Build the judgment and workflows to make Copilot a daily partner

- 5 take-home artefacts
- Workflow design and context engineering
- Governance built in from minute one
- One working AI agent configured

COURSE 2

Developing Human-led AI agents

- Identify a valuable workplace opportunity for a practical single AI agent.
- Build a human-led agent with clear context, reusable instructions, permissions and evaluation checks.
- Leave with a developed and tested Single-Agent and a responsible pathway for workplace use.

COURSE 3

Designing human-led multi-agent workflows

- Determine when multiple agents are appropriate and select a workflow pattern.
- Design agent roles, handoffs, orchestration, evaluation and human approval points.
- Leave with a Multi-Agent Workflow Brief and an understanding of when organisational governance support is required.

COURSE 4

Leading human-agent teams

Design & lead teams where humans and AI agents team up

- 6 take-home artefacts
- 90-day team implementation roadmap
- Decision rights and workforce transition
- Value demonstration framework

Leading the AI-Native Organisation



Globally recognised certification | ½ day workshop | Face-to-face

Leaders are expected to fund, govern, and drive AI initiatives while also setting direction and guiding organisational change. The challenge isn't the technology itself, it's having the confidence, clarity, and leadership capability to navigate AI-driven transformation.

- How to prioritise what's strategically meaningful versus hype
- How to set budgets and governance that don't slow progress or invite risk
- How to shape a culture that embraces AI rather than fears it
- How to build a realistic path toward an AI-Native operating model, across strategy, workforce, data, technology, and governance, without chaos or waste.

Connect with us on LinkedIn!



Mike Boutel
Head of Training



Laetitia Callegari
AI Senior Trainer