Automate to Elevate

How Smart Automation Frees Our Volunteers

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Built to Move

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Project Management Institute.

Disclaimer

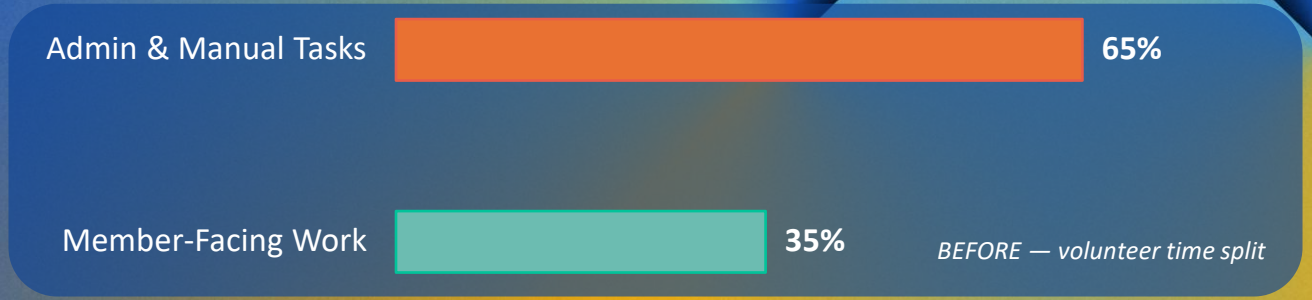
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- This presentation is for registered attendees of North America LIM 2026.

Learning Objectives

- Identify high-friction operational tasks in their chapter and evaluate automation opportunities using a structured assessment framework
- Apply a step-by-step automation and AI implementation approach using accessible tools such as Power Automate, Microsoft Forms, and Teams
- Measure the operational and volunteer experience impact of automation initiatives to demonstrate value to chapter leadership

THE PROBLEM

The Volunteer Time Trap



- Tech requests buried in personal email inboxes — no tracking
- Volunteer onboarding documents filed by hand each cycle
- Internal approvals sitting in inboxes for days with no visibility
- Monthly performance reports compiled manually, always late
- Security posture untested — no phishing awareness program

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CONTEXT

PMI Houston Technology Team — 2025

Enable

Tools & platforms powering chapter operations

Analyze

Data insights & Power BI dashboards for leadership

Automate + AI

5 workflow automations + AI Chat Agent + Predictive Model

Secure

Phishing simulation, audits & access governance

2025: 68 programs · 2,570 attendees · $200K+ revenue · 230K website hits — all supported by a lean volunteer tech team.

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OUR FRAMEWORK

Three Acts. One Playbook.

1

IDENTIFY

Find the friction — map highest-effort, most frequent manual tasks draining volunteers.

2

BUILD

Design & deploy automation and AI solutions using tools you already have, zero extra budget.

3

MEASURE

Track outcomes, prove value to leadership, and build the case to scale further.

This is the case study structure — and the model you'll take home today.

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ACT 2: BUILD — 5 Automations

The 5 Workflow Automations We Built



Tech Request Handling

✓ ~100 tickets resolved, faster turnaround, full Planner visibility



Workflow Approvals

✓ Internal approvals routed through Teams — no lost inbox chains



Volunteer Onboarding & Archival

✓ 0 missed steps, 100% docs auto-filed to SharePoint



Onboarding Document Archival

✓ Organized, consistent automated document management



Monthly Email Trigger System

✓ Auto-delivered to venue leads on 1st of month — zero manual effort

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ACT 2: BUILD — Deep Dive

Automation #1: Tech Request Handling

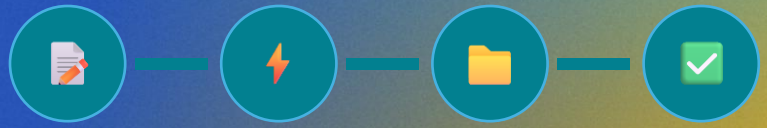
BEFORE	AFTER
✗ Manual emails to VP of Tech inbox	✓ MS Form → Auto-Ticket → Planner card
✗ No tracking or ticket visibility	✓ Full team visibility, auto-assigned
✗ Requests lost or forgotten	✓ Auto-notifications at every step
✗ No SLA or accountability	✓ Priority tagging & categorization
✗ Slow, inconsistent responses	✓ ~100 tickets resolved in 2025, faster time

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ACT 2: BUILD — Deep Dive

Automation #2: Dashboards

Volunteer Onboarding — Auto-Flow



0
Missed steps

100%
Docs filed

↓80%
Manual effort

🔒 Cybersecurity & Governance:

Phishing simulation campaign · Account & license audits · Access governance improvements · Risk Reporting Module launched for members & non-members

4 Power BI Dashboards Delivered

Registration Preview

Real-time event registration visibility for leadership

Conference Analytics

337 attendees · $242,750 revenue tracked live

Membership Dashboard

Trends, retention & member insights for the board

Event Performance

Revenue, participation & location analytics in one view

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ACT 2: BUILD — AI INNOVATION

Bringing AI to PMI Houston in 2025



Chapter Document AI Chat Agent

- Trained on charter, bylaws, policies & board procedures
- Members & leaders get instant, sourced answers without searching SharePoint
- Eliminates repetitive policy lookup requests from volunteer leaders
- Improves consistency & accuracy of governance answers chapter-wide



Predictive Event Attendance Model

- Forecasts turnout using historical registration data patterns
- Supports venue sizing, staffing & catering decisions with data — not guesswork
- Flags events at risk of under-registration to inform outreach timing
- Closes the loop: past event analytics → future event strategy

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PMI Houston · Pioneering AI-Powered Chapter Operations

ACT 3: MEASURE

2025 Results — Proving the Value

~100

Support tickets resolved

Faster turnaround, full visibility

5

Workflow automations shipped

All on existing M365, $0 extra

4

Power BI dashboards built

Leadership always data-informed

2

AI tools launched

Chat Agent + Predictive Model

- 📊 4 Power BI dashboards — 68 programs, 2,570 attendees, $264K revenue tracked in real time
- 🎤 Annual Conference 2025 — 337 attendees, $200K+ revenue, full tech support end-to-end
- 🔒 Phishing simulation + account audits + Risk Reporting Module — security posture strengthened
- 🛒 PMI Houston e-Shop launched — merchandise management + member engagement elevated
- 💰 License Utilization Optimization — reclaimed unused tools, reduced operational costs

HOW IT ALL CONNECTS

The Technology Flywheel in Action

Automation freed volunteer hours

5 automations removed manual effort from requests, onboarding, approvals & reporting.

Dashboards sharpened every decision

4 Power BI dashboards: real-time visibility into membership, events, revenue & conference.

Security protected digital assets

Phishing simulation, access audits & Risk Module strengthened chapter security posture.

AI elevated member experience

Document Chat Agent + Predictive Attendance Model — serving members faster & planning smarter.

Each pillar fed the next — creating a self-reinforcing cycle of operational excellence.

HONEST REFLECTION

What We Learned the Hard Way

Volunteer adoption takes time

Some volunteers reverted to old habits. Change management matters as much as the automation itself.

Start simpler than you think

Our first request form was too complex. Simpler triggers = faster adoption. Minimum viable workflow wins.

Communication is the last mile

Great automation fails silently if people don't know it exists. We needed a launch plan, not a quiet rollout.

Plan for version 2.0

No automation was perfect on day one. Budget time for feedback loops. Done beats perfect every time.

YOUR TAKEAWAY

Chapter Automation Starter Template

5 ready-to-use Excel files — download at the QR code

Friction Audit Worksheet

Auto-calculates Priority Score. Identifies your #1 automation candidate immediately.

Workflow Blueprint (3 templates)

Step-by-step flows: Tech Requests, Volunteer Onboarding, Monthly Reporting.

Effort vs Frequency Matrix

Pre-built 2×2 prioritization grid — drop in tasks, get quadrant assignment automatically.

Impact Measurement Template

Before/After tracker + Board Summary one-pager pre-filled with PMI Houston actuals.

Tool Decision Guide

Color-coded grid: which tool fits which use case across 14 common chapter scenarios.

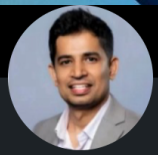
Scan QR code to download all 5 resources — use them tomorrow.

"Movement starts with removing what's in the way."

Built to Move — PMI North America LIM 2026

In 2025, PMI Houston automated 5 workflows,
built 4 dashboards,
launched 2 AI tools — and freed our volunteers to focus on members.

Your chapter can too.



Manish Kumar, PMI-CPMAI™, PMI-CAPM™
Digital Transformation | Data & Analytics | Vice President Technology - PMI Houston | Global Speak...

Key Takeaways

- Identify high-friction tasks using the Effort vs. Frequency matrix — the same tool PMI Houston used to prioritize 5 automations in 2025
- Apply the Identify → Build → Measure playbook using accessible M365 tools at $0 additional budget to reduce volunteer burden immediately
- Measure and communicate automation impact to chapter leadership using the Impact Measurement Template provided today

Thank you!

Questions?