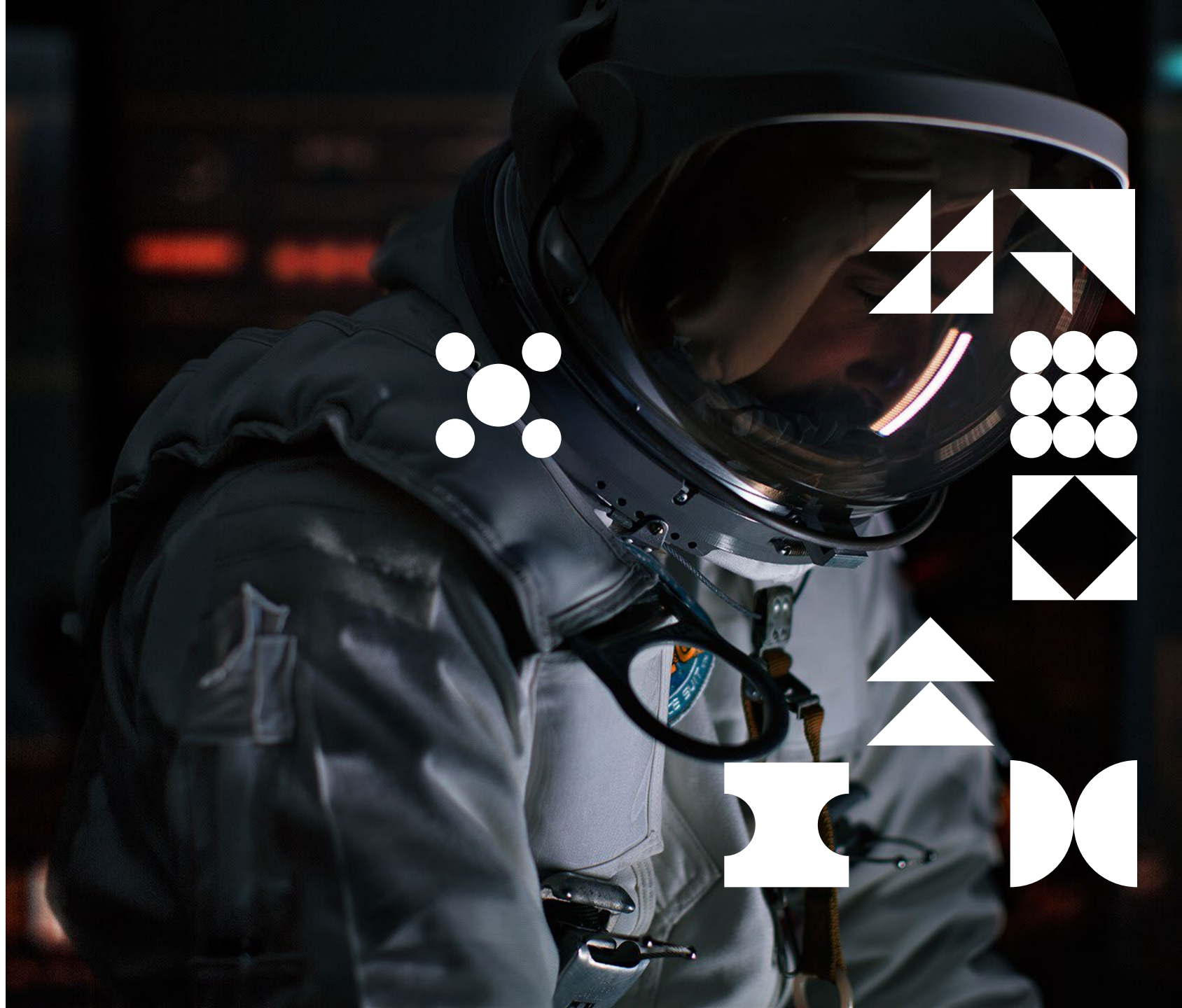


# THOUGHTSPOT OVERVIEW

(CRS REPLACEMENT)

[THOUGHTSPOT@PMI.ORG](mailto:THOUGHTSPOT@PMI.ORG)

JULY 2022



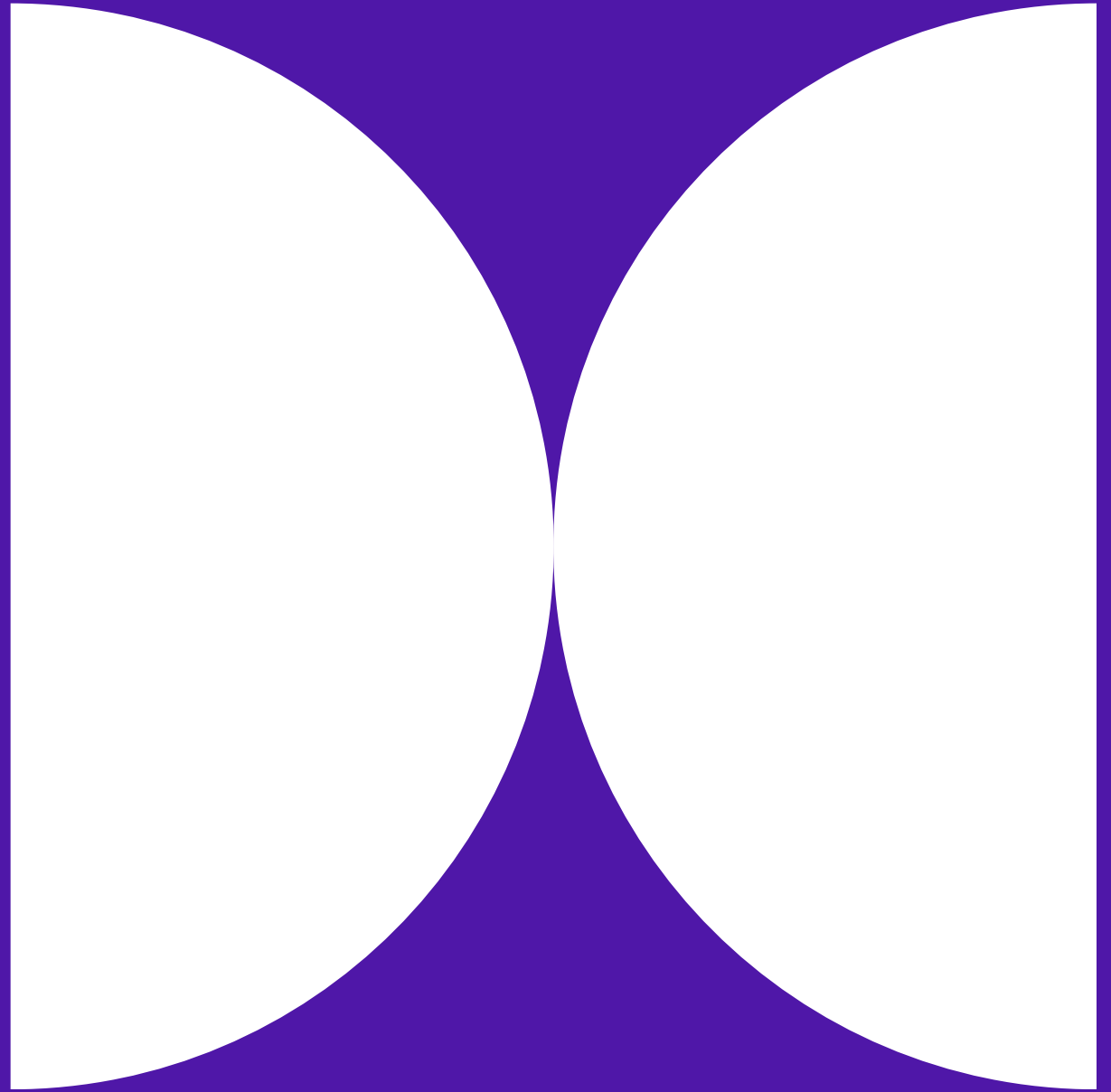
# Agenda

Background of Chapter Reporting System / Data

Access

ThoughtSpot Training

# BACKGROUND





# Our Strategic Objectives

These objectives align our community in a common direction, allowing us to shape the future – together.

## Broaden our Reach

Empower the PMI Community to share our collective wealth of knowledge with new people who need it.

## Deepen our Impact

Have a profound impact on people's lives and EMPOWER THEM to make their ideas a reality.

## Nurture Lasting Relationships

Cultivate deep, trusting relationships with people and organizations who share our aspiration.

# Chapter Engagement

Goals of our Chapter Work:

**Connect you** more strongly with PMI and other chapter leaders

**Enable your** day-to-day chapter operations, as well as strategically increase the value of chapter membership, including exclusives and recognition opportunities.

**Empower you** to grow your chapter and impact your community

*“Improve Membership Management Tools (analysis, reports, Business Intelligence)”*

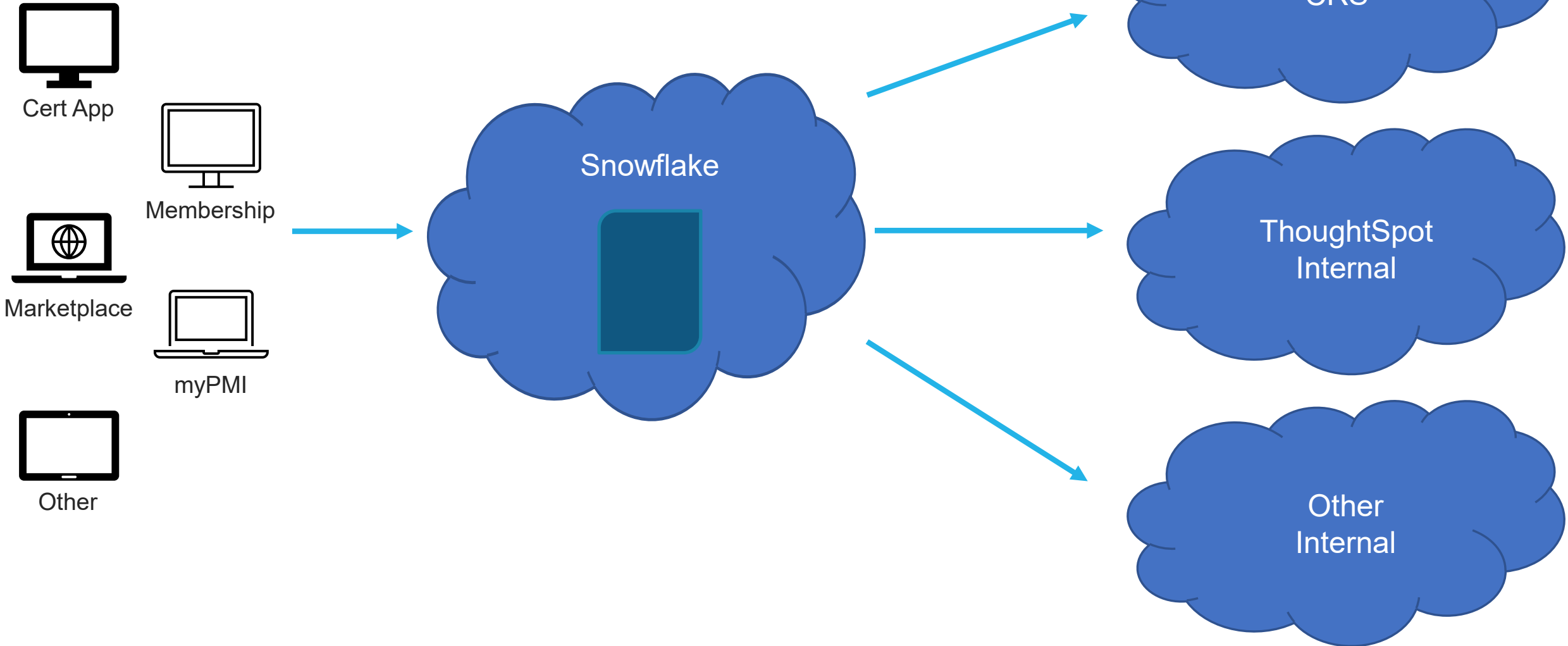
*“Significantly less administrative overhead through uplevelling tech & abilities”*

*“The data on which we work as chapter are limited and not always coherent”*

*“New MIS database related to the chapter operations (members, finance etc)”*

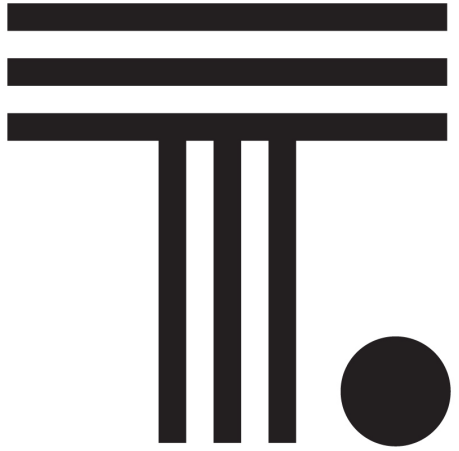
*“We as chapters spend a lot of time figuring out data provided by PMI such as Members list, or volunteers list. We need a trustable CRS and VRSM.”*

# Data Flow



# Snowflake Data Cloud Benefits

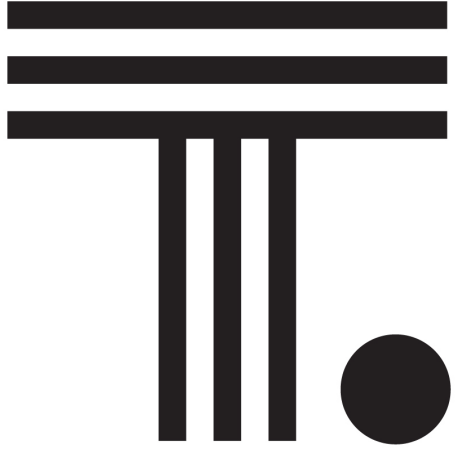
- Unlimited storage capacity
- On demand, immediate compute power
- Separation of processing-Load data 24/7 with no impact to end user query
- Real time aggregation and calculation during query run time with large datasets
- Ability to query tables with tens of millions of rows in seconds



# ThoughtSpot

Maximize the value of your cloud data warehouse and accelerate speed-to-insight for everyone across your business.

Stop waiting for custom reports from data experts and instantly answer ad-hoc data questions on the fly.



# ThoughtSpot

- Access to data
- Anyone can search
- Anyone can ask any questions, find insights, and drill into infinitely in seconds!

# Early Adopters

Debra Covey, Los Angeles Chapter  
Jeff Manhardt, PMI Buffalo, NY Chapter  
Kevin Hallquist, NC Piedmont Chapter  
Michele Gagne, Region Mentor  
David B Craig, PMI Silver Spring Chapter  
Phil Cartegena, Mass Bay Chapter  
Toby Utermohlen, PMI Staff  
Chris Mairs, PMI Staff

Anita Takacs, PMI Budapest, Hungary Chapter  
Joerg Glunde, PMI Germany Chapter  
Tomasz Grochowski, PMI Poland Chapter  
Nicolas Rides, PMI France Chapter

Xing Ying Lee, PMI Staff  
Kuni Mishima-san, PMI Japan Chapter  
Nelson Makokha Garissa, PMI Staff  
Abhishek Sharma, PMI Staff  
Atik Shah, PMI Pune-Deccan India Chapter  
Rajesh Panchal, PMI Gujarat, India Chapter  
Sachin Sood, PMI Bangalore India Chapter  
Sindhya Sudheendran, PMI Trivandrum, Kerala Chapter  
Suma Murthy, PMI Pearl City, Hyderabad Chapter  
Kai Lee, PMI Malaysia Chapter

Maria Cristina Basil Duarte, Distrito Federal, Brasil  
Daniel Fernandes, PMI Pernambuco, Brazil  
Diego Valverde, PMI Staff  
Gloria Folle, Chapter Insight Team  
Lucimari Paggiossi, PMI Sao Paulo, Brazil Chapter  
Roger Montenegro, PMI Panama Chapter  
Renzo Toledo, PMI Lima, Peru Chapter

Jabulile Makhubo, PMI South Africa Chapter  
Mary Phiri, Region Mentor  
Frank Owusu-Asamoah, PMI Ghana Chapter  
Stephen Githinji, PMI Kenya Chapter

# Q4 2024 - Q4 2025 Deliverables



- Financial Reporting Enhancements
- Canada Tax Jurisdiction Reports
- Single Membership Reporting

- Training
- Single Membership Reporting Enhancements

# CRS Reporting Feedback

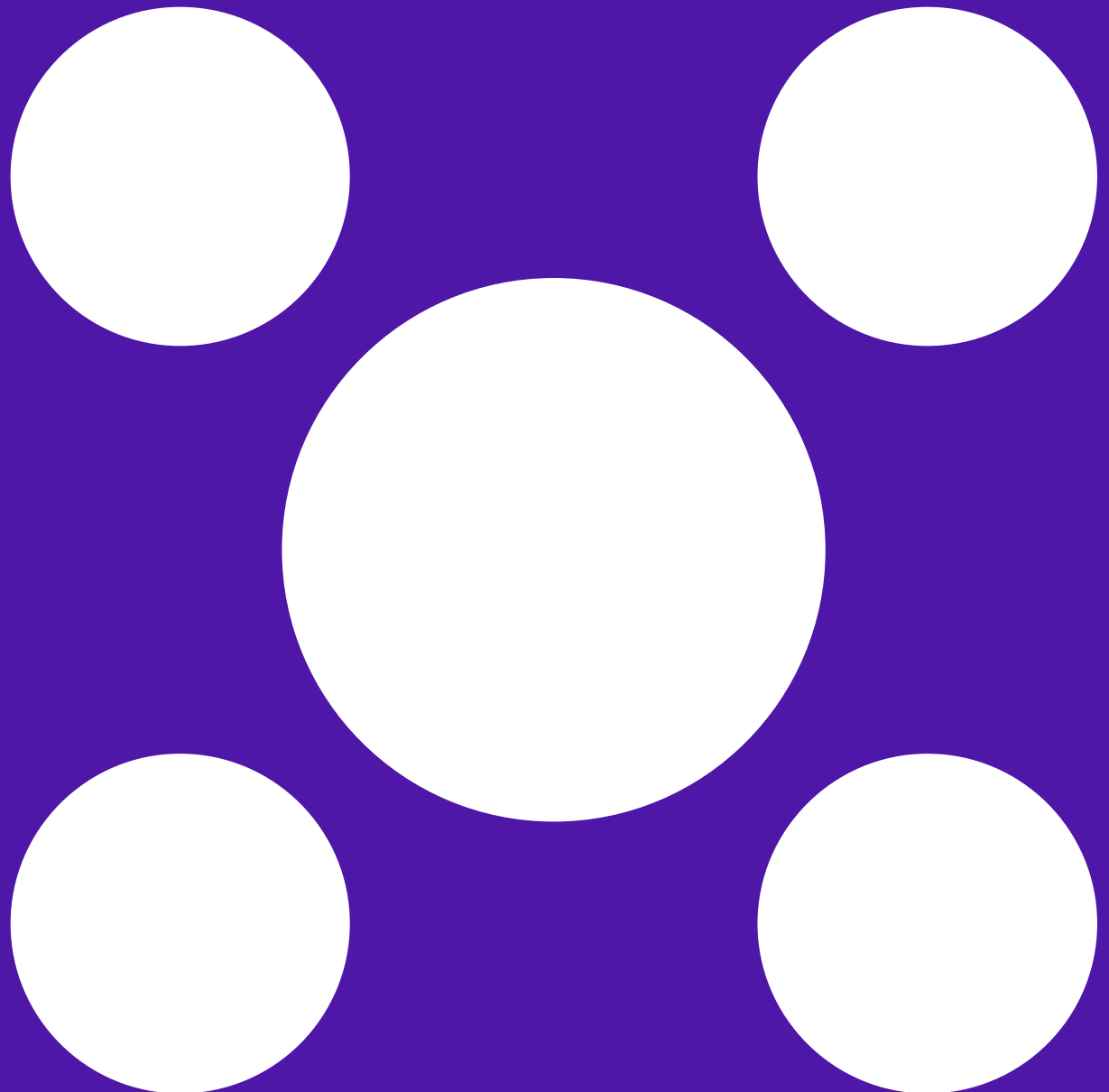
## 3 Reporting Categories

1. **Metrics – KPIs**
2. **Visuals – trends**
3. **Data – to take action**

Access to data

Data definitions (data dictionary)

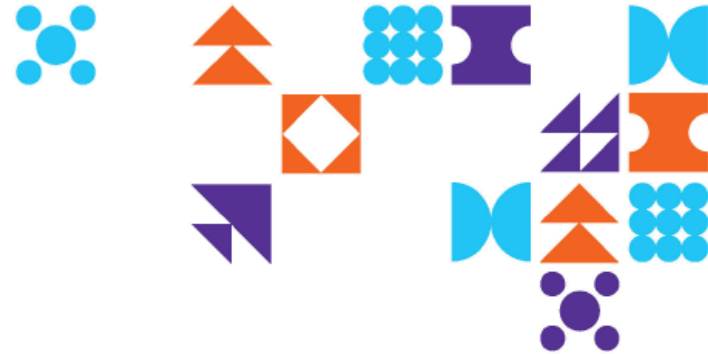
# ACCESS



# PMI Policy Manual for Chapters

## Section 6

## Page 33



### Policy Manual for PMI Chapters

PMI Chapter Development Team

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LAST UPDATE: JULY 2021



## 6. Chapter Membership Policies

### 6.1 Chapter Membership Eligibility

Chapter membership is open to and limited to any eligible PMI member who meets the qualifications for such chapter membership and who pays the applicable chapter dues. Membership in any chapter is voluntary, and members may join as many chapters as they wish.

### 6.2 Chapter Use of PMI Membership Information and Data

Article 9 of the PMI Chapter Charter Agreement states:

*Any information pertaining to membership, including but not limited to databases, lists, mailing labels and reports, which is provided by PMI to the chapter may be used only in connection with the authorized, lawful business of the chapter, consistent with the terms of this PMI Chapter Charter Agreement. Such information is considered confidential and shall not be shared with individuals or business entities outside of PMI or the chapter without the express, written permission of the PMI President and CEO. The chapter shall abide by all other policies and guidelines established by PMI related to the use and protection of PMI membership data.*

# Access

- Access to ThoughtSpot will be Single Sign On (SSO) (PMI.org UN/PW)
- Leveraging the existing permissions structure in alignment with the [Chapter System](#)
- We are strongly encouraging Chapter Presidents to look closely at the permissions for each officer listed in the CS.

# Chapter System

## Officers

Dedicated volunteers in leadership who support this chapter. These volunteers may be elected or appointed.

[Manage Officers](#)

## Volunteers

15 Active Volunteers

## Add Chapter Officers

### Step 1: Volunteers

Select volunteers to fill this role

Enter email or PMI ID

Select

Once you have selected volunteers for this role you will see them here.

### Step 2: Role Details

Title of Officer Role

Start Date

02/10/2025

End Date

02/11/2025

Role Description

0/2500

Group

Select or search



Contact Email

Volunteers will be directed to contact this email if they have questions.

### Step 3: Permissions

What access should this officer have to the Chapter System?

- No Access
- View Access
- Edit Access

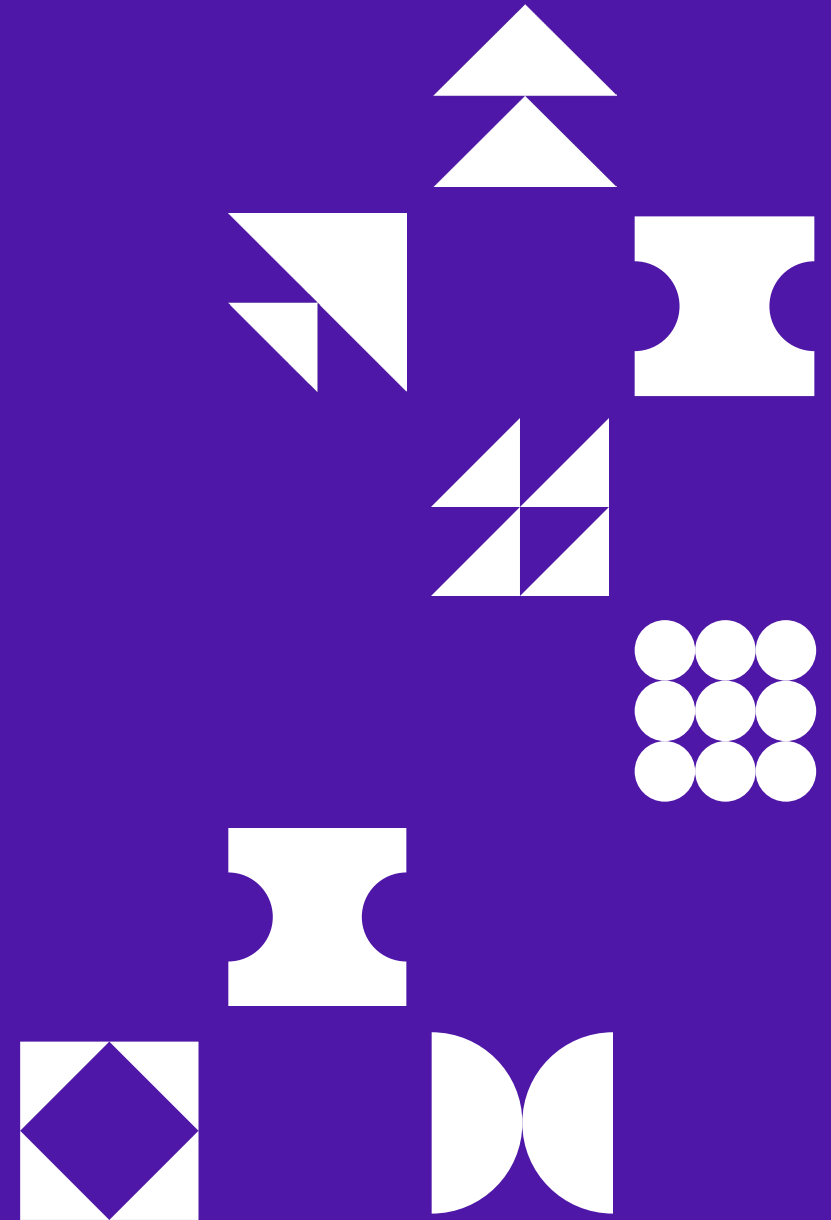
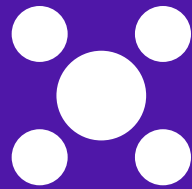
What other systems should this officer have access to?

- ThoughtSpot  
ThoughtSpot, the one-stop-shop for all chapter reporting, including current/prospective membership data, certification data, and chapter membership satisfaction survey results

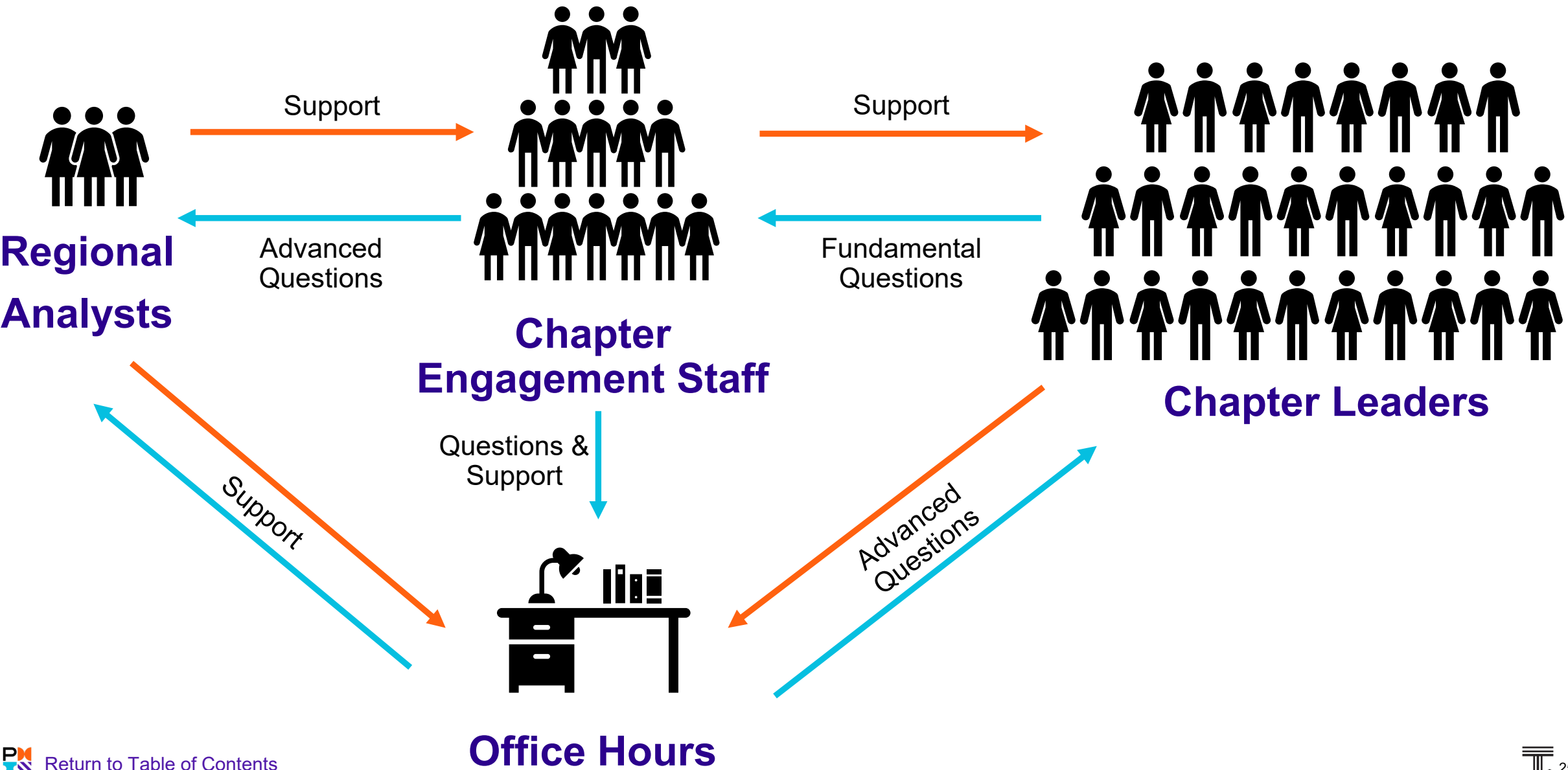
Cancel

Add Chapter Officer(s)

# THOUGHTSPOT TRAINING



# Support Model



# ThoughtSpot – Mobile App

