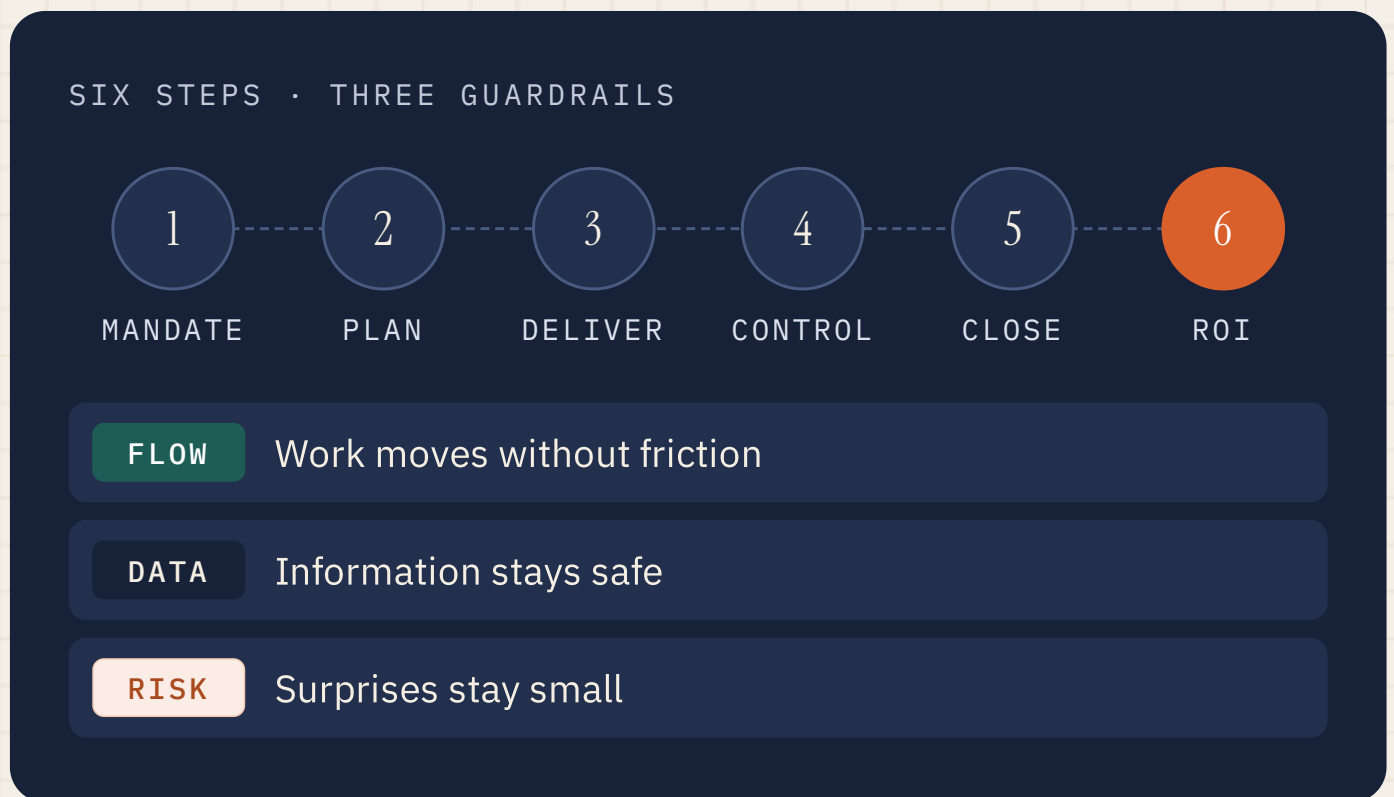


AI across the *project lifecycle*

From mandate to ROI: which AI tools help at each step, and how to manage the flow, the data and the risk.



Prepared by Michiel R. de Boer, MindMagine

A follow-up to our AI-powered project management workshop

Six steps, *three guardrails*

Framework-neutral: use the step names you already have.

This guide follows a project in six steps, from mandate to ROI. For each step it answers four questions: which AI tools can help, and how to manage the flow, the data and the risk. The tools are examples from several vendors, not recommendations. Start with what you already own.

- 1** **Mandate**
Research the idea and draft the business case.
- 2** **Plan**
Turn the mandate into scope, plan and team.
- 3** **Deliver**
Capture decisions, let agents handle the busywork.
- 4** **Control**
Draft status fast, spot risks early.
- 5** **Close**
Hand over cleanly, keep the lessons findable.
- 6** **Benefits and ROI**
Measure benefits against the baseline.

FLOW

Work moves without friction

DATA

Information stays safe

RISK

Surprises stay small

Shape the *mandate*

Research the idea and build the business case.

Deep research agents

Multi-vendor

ChatGPT, Claude, Gemini, Perplexity: cited research.

Researcher agent

Microsoft

Source-cited reports from your work data and the web.

NotebookLM

Google

Answers grounded in your own documents, with citations.

Project intake agent

monday.com

Scores new requests and flags duplicates.

KEEP IT IN CHECK

FLOW

One intake form for every idea. AI summarises and scores, people decide go or no-go.

DATA

Keep confidential figures in business AI accounts, never in personal ones.

RISK

AI research can be wrong or out of date. Check key claims and figures before the decision.

TRY THIS FIRST

Run one live idea through a deep research agent and compare the result with your current business case.

Build *the plan*

Turn the mandate into scope, schedule and team.

Planner agent

Microsoft

Creates and updates tasks as drafts you review first.

AI Studio

Asana

Turns requests into structured projects, no code needed.

Project planner agent

monday.com

Builds a plan with timeline and owners from a prompt.

Jira with Rovo

Atlassian

Checks if work is ready; agents can pick up tasks.

KEEP IT IN CHECK

FLOW

Use one template from mandate to plan, so AI fills the same fields every time.

DATA

Pick one source of truth for tasks, owners and dates. Not three.

RISK

AI plans look complete but can miss dependencies. Review them with the team.

TRY THIS FIRST

Ask the AI in your work tool to draft a plan from one approved mandate, then review it with the team.

Deliver *the work*

Capture decisions and let agents do the busywork.

Take notes for me

[Google](#)

Meeting notes and actions, even in person or on Zoom.

Copilot in Teams

[Microsoft](#)

Meeting recaps with notes and follow-up tasks.

AI Companion

[Zoom](#)

My Notes works across Zoom, Teams, Meet and in person.

Desktop AI agents

[Multi-vendor](#)

Claude Cowork or ChatGPT Work draft files in set folders.

KEEP IT IN CHECK

FLOW

Actions from meetings go straight into the task tool, each with an owner and a date.

DATA

Tell people when AI takes notes, and follow your consent rules.

RISK

AI notes can pin an action on the wrong person. Check before you send them.

TRY THIS FIRST

Let AI take notes in one recurring meeting for a month, and compare missed actions before and after.

Stay *in control*

Draft status fast, spot risks early.

Rovo in Jira

Atlassian

Generates status updates and cleans up stale work.

Portfolio agents

monday.com

Chase updates and flag risks across all projects.

Copilot in Power BI

Microsoft

Report summaries grounded in your own data.

Gemini in Looker

Google

Ask questions about your data in plain language.

KEEP IT IN CHECK

FLOW

Weekly rhythm: AI drafts the status from live data, the PM checks and sends it.

DATA

Status is only as good as the task data. Keep updates in the tool, not in chat.

RISK

A person owns the red, amber or green call. AI suggests, it does not decide.

TRY THIS FIRST

Let AI draft one weekly status report from live data, and track how long the PM needs to check it.

Close and *hand over*

Hand over cleanly and keep the lessons findable.

Confluence with Rovo

Atlassian

Search and chat across pages, tickets and decisions.

NotebookLM

Google

Turn project files into a searchable handover notebook.

Microsoft 365 Copilot

Microsoft

Summarises files and chats you already have access to.

Claude or ChatGPT

Multi-vendor

Turn retrospectives and surveys into clear lessons.

KEEP IT IN CHECK

FLOW

Build the handover pack from project data, then let the receiving team review it.

DATA

Archive in the right place and remove access, including for AI agents and connectors.

RISK

Lost context is the real risk. Store decisions where AI search can find them later.

TRY THIS FIRST

Put one finished project's documents into a notebook tool and test whether a newcomer finds the answers.

Prove *the value*

ROI = (benefits – costs) ÷ costs, against a baseline.

Copilot Analytics

Microsoft

Links Copilot use to your KPIs in an impact report.

Analyst agent

Microsoft

Finds trends and outliers in your benefits data.

Claude in Excel

Anthropic

A spreadsheet agent for your benefit and cost models.

BI dashboards

Multi-vendor

Power BI or Looker to track each benefit over time.

KEEP IT IN CHECK

FLOW

Measure the baseline before go-live, then review benefits at fixed dates after.

DATA

Define each benefit up front: metric, owner, data source and target date.

RISK

Time saved is not money saved. Show where the freed-up time actually went.

TRY THIS FIRST

Pick one benefit, write down today's baseline, and set the date you will measure it again.

Manage *the flow*

Work should move on its own, with people at the gates.

One front door

01

Every request enters through one intake form or board, so nothing starts on the side.

One source of truth

02

One tool holds tasks, owners and dates. Everything else links to it.

Automate the hand-offs

03

Power Automate, Zapier, Make or n8n move work between tools, no copy and paste.

Connect AI to your tools

04

MCP connectors let Claude, ChatGPT, Copilot and Gemini work with your tools.

People at the gates

05

AI drafts, people approve: go or no-go, status, changes and spending.

TIP MCP is an open standard, now hosted by the Linux Foundation and backed by the major AI platforms.

Manage *the data*

Know what goes in, who can see it, and where it lives.

Business accounts only

01

Business plans of ChatGPT, Claude and Gemini don't train on your data by default.

Classify before you share

02

Label information as public, internal or confidential, and agree what may go into AI.

Fix oversharing first

03

AI sees what each user can see. Clean up permissions, for example with Microsoft Purview.

Know where data lives

04

Check region settings. Some AI features may process data outside your region.

Follow the law

05

Personal data rules still apply: Malaysia's PDPA, GDPR in Europe, and your sector rules.

TIP The real dividing line is a personal versus a business account, not free versus paid.

Manage *the risk*

Two kinds: risks in the project, and risks from AI.

01

Keep an AI register

List every AI tool and agent, the data it touches, and who owns it.

02

Human in the loop

AI drafts, people decide, especially on status, money and people.

03

Test before you trust

Spot-check outputs, log errors, and fix the prompt or the process.

04

Limit what agents can do

Only the folders and tools they need, and approval before they act.

05

Use a framework

ISO/IEC 42001, the NIST AI RMF, or Malaysia's AIGE guidelines as your checklist.

WATCH Malaysia consulted on an AI Governance Bill in July 2026. The EU moved its high-risk AI rules to December 2027.

Where to *start*

Small, measured steps beat a big-bang rollout.

- 1 Pick the one step where the pain is biggest.
- 2 Start with a tool you already pay for.
- 3 Set one metric and measure the baseline first.
- 4 Review after 30 days, then scale or stop.

Questions, or ready to plan a pilot?

Contact Michiel R. de Boer at MindMagine.

ABOUT THE TOOL CHOICES

Tools are named as examples, not endorsements. Features, plans and prices change often, and some features need a specific licence. Checked in September 2026; please confirm details with each vendor before you commit. Sources are on the next page. Not rechecked, from general knowledge: deep research in ChatGPT, Claude, Gemini and Perplexity; Copilot in Teams; Power Automate, Zapier, Make and n8n; ISO/IEC 42001 and the NIST AI RMF.

Sources

Checked in September 2026; some are independent summaries.

Planner Agent generally available, June 2026

<https://spaces.collab365.com/posts/microsoft-makes-planner-agent-available-to-all-cop-iBb5Cj>

Researcher agent in Microsoft 365 Copilot

<https://www.aguidetocloud.com/blog/microsoft-365-researcher-agent/>

Asana AI Teammates and AI Studio

<https://asana.com/inside-asana/winter-release-2026>

monday.com agents for project management

<https://monday.com/departments/pmo>

Jira and Rovo agents

<https://www.atlassian.com/software/jira/release>

Google Meet Take notes for me, expanded

<https://www.androidauthority.com/google-meet-take-notes-for-me-expansion-3659933/>

Zoom AI Companion across Teams and Meet

<https://www.uctoday.com/unified-communications/zoom-ai-companion-microsoft-teams-google-meet/>

Copilot report summaries in Power BI

<https://learn.microsoft.com/en-us/power-bi/create-reports/copilot-pane-summarize-content>

Copilot Analytics and business impact

<https://techcommunity.microsoft.com/tag/copilot%20in%20viva>

Business AI plans and training on your data

<https://ai.netzstrategen.com/en/insights/ai-provider-data-privacy-comparison/>

Copilot, permissions and sensitivity labels

<https://learn.microsoft.com/en-us/training/modules/purview-ai-secure-copilot/sensitivity-labels-copilot>

MCP moved to the Linux Foundation

<https://www.anthropic.com/news/donating-the-model-context-protocol-and-establishing-of-the-agent-ai-foundation>

EU AI Act: high-risk rules moved to December 2027

<https://www.casrai.org/news/eu-ai-act-digital-omnibus-deadline-delay>

Malaysia's proposed AI Governance Bill

<https://accesspartnership.com/opinion/malaysias-proposed-ai-governance-bill-weigh-in-before-the-window-closes/>

Malaysia's AIGE guidelines

<https://chambers.com/articles/insight-into-malaysia-s-newly-launched-ai-governance-ethics-guidelines>