

How I Deliver: Pre-AI and AI-Multiplied

Four representative programs across two decades of enterprise delivery — shown as they were executed before AI, and as I would execute them today with it. The work is real; the comparison is the point.

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How to read this document. Each example is a real program I led. The Pre-AI column describes how the work was actually executed at the time. The AI-Multiplied column describes how I would execute the same work today, applying current AI tooling to proven experience — same rigor, compressed. AI changes the speed, scale, and reach of the work; the judgment and accountability stay human.

The artifact changed shape at every altitude — BRD, user story, backlog, roadmap, portfolio — but the job never did: deciding what gets built, for whom, and in what order.

A note on confidentiality. Software platforms are named as a matter of demonstrated capability. Client organizations are described generically and no proprietary process, data, or configuration detail is included, in keeping with the confidentiality owed to former employers.

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Enterprise Requirements Across Five Business Lines

Understanding the problem · AI leverage: synthesis

CLIENT

A major insurance carrier

PROJECT TYPE

Enterprise requirements & process improvement

SCOPE

5 business lines · claims operations

A multi-workstream program supporting five business lines and critical claims-operations initiatives. **A former CIO recruited me to the organization specifically to complete it** — an initiative that had stalled on and off for roughly a decade. I delivered it in about a year, holding it stable through multiple PM and QA turnovers on a genuinely complex program. I operated as the connective tissue of delivery: a strong partnership not only with the business but across **PM, QA, and Dev**, with executive visibility through joint status reporting to the **CIO of Claims IT** alongside the PM.

IN PRODUCT TERMS

Product equivalent: Discovery and requirements ownership — the “what and why” before anything is built.

Artifacts owned: BRDs and functional specs; user stories with acceptance criteria as programs moved to Agile; requirements traceability; the BA standards that cut documentation cycle time 75%.

PRE-AI — AS EXECUTED

- Authored the **BA Strategy** to frame scope, stakeholders, and approach before elicitation.
- Ran stakeholder interviews across all five business lines; captured and clustered themes by hand.
- Built the full **BRD** — process flows, swimlane diagrams, use cases and use case diagrams, and mockups — across separate tools.
- Maintained the traceability matrix and mapped each requirement to acceptance criteria and test cases; re-synchronized manually as scope shifted.

AI-MULTIPLIED — AS I'D DO IT TODAY

- AI drafts the BA Strategy and clusters interview themes across all five lines, surfacing contradictions between stakeholders.
- AI drafts process flows and swimlane diagrams from transcripts, generates first-pass use cases and diagrams from the requirements, and turns described screens into mockups.
- Generate the traceability matrix, acceptance criteria, and test cases directly from the requirements.
- When a requirement changes, AI propagates the downstream impact and flags what is now out of sync — no silent gaps.

User Stories & Backlog Readiness

PRE-AI

Decompose each approved requirement into user stories by hand, write acceptance criteria one story at a time, size them with the team, and keep the story map and the BRD in sync manually as scope moved.

AI-MULTIPLIED

AI drafts the story set and first-pass acceptance criteria straight from the approved requirements, flags stories that are too large or untestable, and regenerates the story map when a requirement changes. I decide which stories are real and which are noise.

OUTCOME

Completed in about a year an initiative that had stalled for roughly a decade. Reduced documentation cycle time by **75%**, improved standards consistency across teams, and contributed to a **15% improvement in claims-processing efficiency** — establishing stronger enterprise BA and requirements discipline.

WHAT STAYS HUMAN

Deciding which requirements **actually matter to the business**, reading the room when two executives want incompatible things, and holding the trust that lets one analyst partner credibly across business, PM, QA, and Dev at once. AI organizes the inputs; the analyst owns the judgment and the relationships.

Enterprise Platform Deployments

Delivering the work · AI leverage: foresight

PLATFORMS

Workday · UltiPro (now UKG Pro) · Salesforce

PROJECT TYPE

Enterprise SaaS deployment (HR & CRM)

CLIENT

Enterprise employers

Led the deployment of enterprise HR platforms — **Workday and UltiPro (now UKG Pro)** — and oversaw a **Salesforce** CRM deployment. Spanning both HR and CRM domains demonstrates repeatable deployment discipline across different enterprise-platform types: requirements-to-configuration, data migration, testing, cutover, and adoption.

IN PRODUCT TERMS

Product equivalent: Sprint and release ownership for a single product line.

Artifacts owned: prioritized project backlog in Jira; user stories groomed with the BA and dev lead; sprint plans; release notes; RAID log.

PRE-AI — AS EXECUTED

- Built the WBS, schedule, and resource plan by hand; re-baselined manually as reality moved.
- Coordinated implementation partners and vendors; mapped business requirements to platform configuration.
- Planned data migration, ran UAT cycles, and managed cutover and go-live readiness.
- Maintained the RAID log, ran the status cadence, and coordinated change management and training.

AI-MULTIPLIED — AS I'D DO IT TODAY

- AI drafts the WBS and first-pass schedule from scope, proposes estimates from comparable deployments, and re-forecasts the moment a task slips.
- AI models deployment scenarios and their risk profiles and pressure-tests the cutover plan's assumptions.
- AI drafts test coverage from requirements and clusters and de-duplicates defects across cycles.
- Status compiles from the tracker into a layered report tailored per audience; risk is surfaced before it escalates, not after.

Backlog Grooming & Sprint Planning

PRE-AI

Weekly grooming sessions, manual prioritization against a spreadsheet of stakeholder asks, velocity tracked by hand, sprint scope negotiated line by line.

AI-MULTIPLIED

AI pre-ranks the backlog against stated priorities and dependencies, drafts the sprint proposal, and surfaces the conflicts before the meeting. The meeting shrinks to the decisions only.

OUTCOME

Delivered enterprise platform deployments across HR and CRM domains — managing scope, schedule, risk, vendors, and adoption through go-live in complex, multi-stakeholder environments.

WHAT STAYS HUMAN

Owning the commitment — the **cutover go/no-go call**, when to escalate, when to hold the line on scope, and the trust built with the business through a high-stakes transition. That accountability does not delegate to a model.

Executive Reporting Program

Coordinating at scale · AI leverage: coordination

PLATFORM	PROJECT TYPE	STAKEHOLDERS
Tableau	Enterprise BI / reporting program	5 senior executives · their respective organizations

Directed a roughly year-long program to build **Tableau** reporting for **five senior executives**, each for their respective organization. **I was chosen to build the program from the ground up** when it needed to be established and rescued — managing the Business Analyst driving requirements across the organizations and holding a working **partnership with the Tech Lead** who oversaw the database, reconciling five sets of executive reporting needs into a coherent, governed delivery.

IN PRODUCT TERMS

Product equivalent: Backlog ownership across a program — sequencing 30–40 interdependent workstreams like a multi-team product roadmap.

Artifacts owned: program-level backlog and dependency map; release train plan; Power BI and Smartsheet dashboards reporting what shipped and why to SVPs.

PRE-AI — AS EXECUTED

- Set the program spine: one coherent reporting outcome serving five different organizations.
- Managed five senior executive stakeholders with distinct definitions of what mattered.
- Directed the BA on cross-organization requirements; partnered with the Tech Lead on the data model and database.
- Ran the governance cadence, managed cross-organization dependencies, and reported program health.

AI-MULTIPLIED — AS I'D DO IT TODAY

- AI maps requirements across the five organizations and surfaces overlaps and conflicts early.
- AI drafts the reporting specification and models the data requirements that inform the Tech Lead partnership.
- AI aggregates program status continuously and drafts the health narrative — what's green, what's red, and why.
- AI prepares trade-off analysis and scenario comparisons ahead of governance sessions.

Cross-Team Backlog Sequencing

PRE-AI

Reconcile 30–40 project backlogs into a single program sequence by hand, chase dependency owners, rebuild the plan every time one team slipped.

AI-MULTIPLIED

AI holds the dependency graph, re-sequences when a slip is logged, and drafts the impact note to affected leads. I own the trade-off call when two teams can't both be first.

OUTCOME

Built and delivered the program successfully in about a year — establishing executive-grade Tableau reporting across five organizations from a single governed program, aligning divergent stakeholder needs into a coherent, maintained outcome.

WHAT STAYS HUMAN

Aligning **five executives around a shared outcome** — the negotiation, the coalition-building, and the judgment in the Tech Lead partnership about what the program actually exists to serve. AI coordinates the information; the program manager coordinates the people.

\$2M+ Technology Portfolio Governance

Allocating the investment · AI leverage: decision support

CLIENT	PROJECT TYPE	SCALE
A major asset-management firm	Portfolio governance & investment prioritization	\$2M+ · 20–30 concurrent initiatives

Governed a **\$2M+ enterprise technology portfolio** of 20–30 concurrent initiatives across a multi-year mandate. **I built the project intake process from scratch** and led the requirements conversation on each request — serving as **BA, PM, and Program Manager simultaneously** — then prioritized with business and IT leadership, set priorities for the development team, and delivered solution demos to the business once IT completed the work. One person spanning three altitudes at once, from intake to demo.

IN PRODUCT TERMS

Product equivalent: Product-portfolio strategy — deciding what gets funded, sequenced, paused, and killed across a \$2M+ portfolio.

Artifacts owned: investment cases; prioritization framework; capacity plan; C-suite recommendations; from 2023, the enterprise AI delivery backlog (email summarization, contract and legal document search, bi-weekly AI enablement training).

PRE-AI — AS EXECUTED

- Built the **project intake process from scratch** and led the requirements conversation on each request.
- Defined the prioritization framework, gathered and scored business cases by hand, and built the C-suite recommendation.
- Prioritized with business and IT leadership and set delivery priorities for the development team.
- Reconciled demand against capacity across 20–30 initiatives; ran RAID, governance enhancements, and delivered solution demos to the business.

AI-MULTIPLIED — AS I'D DO IT TODAY

- AI normalizes business cases into a consistent scoring model and exposes the reasoning for challenge.
- AI runs scenario comparisons — fund this versus that under a given constraint — and drafts the ranked recommendation.
- AI models demand versus capacity continuously and simulates the impact of adding or cutting an initiative.
- AI consolidates performance into the investment narrative and anticipates the C-suite's likely questions.

Portfolio Roadmap Prioritization

PRE-AI

Build the investment scoring model in Excel, score every initiative, argue the ranking in steering committee, re-score after every budget change.

AI-MULTIPLIED

AI scores initiatives against the framework, models the capacity and budget scenarios, and drafts the recommendation memo. The C-suite gets options with consequences; the recommendation is still mine.

OUTCOME

Strengthened governance maturity and execution predictability — including framework enhancements that **cut project delays by 25%** — and influenced multi-million-dollar C-suite investment decisions through consultative planning.

WHAT STAYS HUMAN

The **allocation call itself** — which bets the enterprise makes with finite capital, when to kill a sunk-cost initiative, and standing behind a multi-million-dollar recommendation in front of the C-suite. AI sharpens the decision; the portfolio leader owns it.

The work changes. The accountability does not.

Across every altitude — from defining a single requirement to allocating an enterprise portfolio — AI increases the speed, scale, and reach of the work. What it does not do is inherit the judgment or the accountability. Those rise with the stakes, and they stay human.

BA **Define what is real** — decide which requirements actually matter.

PM **Own the commitment** — escalate, absorb, and hold the line on scope.

PROG **Coordinate the people** — align competing owners around the outcome.

PORT **Stand behind the investment call** — choose where finite capital goes.

Different artifacts. Same responsibility: decide what gets built, for whom, and in what order.

AI multiplies the work. It does not inherit the judgment or the accountability.