

**PROJECT  SUMMIT  
BUSINESS ANALYST WORLD**

# **FUTURE FORWARD**

**BOSTON, MA**

OCTOBER 21-24, 2024

BOSTON MARRIOTT BURLINGTON HOTEL

## **EVENT GUIDE**



**Macgregor**  
Communications

**IIBA**® Endorsed Conference  
Producer™

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## WHY ATTEND:

- 1** EARN UP TO **22 PDUs and CDUs over 4 days**
- 2** **TOP QUALITY EDUCATION AT COMPETITIVE PRICES**
- 3** REGIONAL ADVISORY BOARD THAT TARGETS **LOCAL ISSUES**
- 4** UNIQUE CONFERENCE MODEL **PMBA COMBINED**
- 5** **NETWORKING** UNLIMITED NETWORKING OPPORTUNITIES WITH YOUR PEERS
- 6** **LOCAL & CONVENIENT LOCATION**



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# GREETINGS FROM THE CONFERENCE VICE PRESIDENT

## FUTURE FORWARD

Are you ready for a challenge and an opportunity? As conference Vice-President, my team and I would like to offer both. We have prepared one of the most unique combinations of sessions and workshops available to you across North America.

As Project Managers and/or Business Analysis Professionals, you are often tasked with managing teams, predicting shifting scenarios and ensuring careful direction, all while understanding the importance of the bottom line. Our conference, ProjectSummit\*BusinessAnalystWorld is designed to create scenarios that deliver these skill-set enhancing situations.

Whether it's through classroom-style sessions by recognized experts and innovators or peer-to-peer casual conversations, the learning process will be natural and above all, fun!

Along with gaining knowledge and making new acquaintances, attendees can claim one credit for every hour of education, up to 18 in total over 3 days, which goes a long way to earning your certification.

I encourage you to take advantage of all the learning and networking opportunities this event provides. Please do not hesitate to contact me directly if you have any questions!

Amy Ruddell | Vice-President, Business Unit  
ProjectSummit\*BusinessAnalystWorld  
aruddell@macgregorcom.com

# 2024 KEYNOTE SPEAKERS



KEYNOTE

## Developing The Nimble Characteristics

**FABRÍCIO LAGUNA**

CBAP, AAC, CPOA, PMP, MBA, CONSULTANT AND TRAINER, THE BRAZILIAN BA

OCTOBER 21 | **8:30AM - 9:45AM**

To survive in the current competitive business environment an organization must develop the capability to sense changes and respond adequately in small learning cycles based on a clear business vision. Implementing an Agile framework or methodology is not enough. The organization's task force must be business-driven, empowered to take decisions, and enabled with the correct skills and structure. In this presentation: • storytelling explains the difference between Agile and Nimble; • practical and engaging group exercise feeds the nimble mind while builds interactive connections between participants; • live experiment simulates an organization evolution and demonstrates how the BA & PM Mindset can offer the 8 characteristics of a nimble organization.



KEYNOTE

## Everything You Need to Know About Artificial Intelligence...But Didn't Know to Ask

**JAMES SPELLOS**

KEYNOTE SPEAKER

OCTOBER 21 | **11:15pm - 12:15pm**

Since ChatGPT exploded in our lives in 2022, Artificial Intelligence (AI) is already having a significant impact on the tasks and requirements needed for today's education and professional work, including the tools required for business analysts. While many people are fearful that AI will replace the need for humans, the reality is much more nuanced than what many are preaching, even as the skill sets and tasks required are evolving.



KEYNOTE

## Blaze Your Own Trail

**SAMRA ZAFAR**

INTERNATIONAL DEI, MENTAL HEALTH, SOCIAL JUSTICE  
EXPERT & AWARD-WINNING AUTHOR

OCTOBER 21 | **3:45pm - 4:45pm**

In this motivational talk, Samra Zafar urges listeners to carve their own paths by leaning into authenticity, finding their purpose, and recognizing their resilience. She shows people how to find and use your voice by sharing her personal journey as a child bride to financial executive and now physician-in-training. Audiences will leave empowered to become their own champions, build their own communities, and ascend internal barriers to unlock their true potential. Participants will learn: About the circumstances that call for allocating specialized resources. How to identify and shift harmful internal dialogues and narratives. Effective practices that lead to self-empowerment without the alienation of others. Productive ways to promote self-love and mutual respect. Practical strategies to lean into one's true identity.



KEYNOTE

## Dysfunction To Dynamic

**AMY YACKOWSKI**

FOUNDER & CHIEF EVOLUTION OFFICER  
PAINTED PORCH STRATEGIES

OCTOBER 22 | **8:30AM - 9:45AM**

Shared purpose, goal alignment, candor and trust are what successful change is built on. Learn how to foster great team dynamics, including creating healthy conflict and innovative thinking!



KEYNOTE

## Navigating Toxic Waters: The Keys to Understanding Organizational Politics

**VINCENT MIRABELLI**

PRINCIPAL RESEARCH DIRECTOR

OCTOBER 22 | **3:45pm - 4:45pm**

In the ever-evolving business landscape, mastering the art of navigating organizational politics is a vital key to success for business analysts and project managers. Join us for an engaging keynote session that will unravel the complexities of organizational politics and empower business analysts to thrive amidst these dynamics. Through an engaging blend of thought-provoking insights, captivating stories, and real-world examples, we will equip business analysts and project managers with the essential skills and strategies to navigate.



# Schedule at-a-glance

Monday, October 21

<p>8:30 am - 9:45 am</p>	 <h2>Fabrício Laguna</h2> <p>CBAP, AAC, CPOA, PMP, MBA, Senior Advisor for the President and CEO, IIBA - The International Institute of Business Analysis</p> <h3>Developing The Nimble Characteristics</h3>			
	<p><b>PROJECT MANAGEMENT</b></p>	<p><b>SHARED SKILLS</b></p>	<p><b>SHARED SKILLS</b></p>	<p><b>BUSINESS ANALYSIS</b></p>
<p>10:00 am - 11:00 am</p>	<p>AI Powered Project Management: Unlocking AI Through A Practical Journey <b>Robbin Simpkins</b> Softchoice Corporation</p>	<p>Leading Change That Sticks <b>Barbee Davis</b> Davis Consulting</p>	<p>Psychological Safety: The Secret Ingredient to High-Performing Teams <b>Hans Eckman</b> Info-Tech / Eckman Guides</p>	<p>Transforming Data Analytics with Visio and Power BI <b>Scott Helmers</b> Harvard Computing Group</p>
<p>11:15 am - 12:15 pm</p>	 <h2>James Spellos</h2> <p>Meeting U.</p> <h3>Everything You Need to Know About Artificial Intelligence...But Didn't Know to Ask</h3>			
<p>12:15 pm - 1:15 pm</p>	<p>Networking Lunch</p>			
<p>1:15 pm - 2:15 pm</p>	<p>Quality Assurance for PMs <b>Martin Fenelon</b> MSD Games, LLC</p>	<p>Change Leadership in Digital Transformation <b>Ebenezer Ajibade</b> PHD Consulting</p>	<p>Weird Science: Build your own Custom GPT (using non-sensitive data) <b>Leslie Hughes</b> PUNCH!media</p>	<p>Customer-Centric Product Mindset for Business Analysts <b>Artsem Lashchonau &amp; Sheel Dave</b> Insight</p>
<p>2:30 pm - 3:30 pm</p>	<p>Everything I Needed to Know about Project Management, I Learned While Wearing Adult Diapers <b>Phil Barth</b> Great Things Happen LLC</p>	<p>7 Agile and DevOps Insights I Wish I Knew Earlier <b>Hans Eckman</b> Info-Tech / Eckman Guides</p>	<p>Cross-Team Collaboration is Hard! Tips &amp; Tricks to Help Solve Divides <b>Vincent Mirabelli</b> Info-Tech Research Group</p>	<p>Power of Data Visualizations <b>Banu Raghuraman</b> Perficient</p>
<p>3:45 pm - 4:45 pm</p>	 <h2>Samra Zafar</h2> <p>Speaker, Samra Zafar</p> <h3>Blaze Your Own Trail</h3>			

## Schedule at-a-glance

Tuesday, October 22

<p>8:30 am - 9:45 am</p>	 <p><b>Amy Yackowski</b>                  Founder &amp; Chief Evolution Officer, Painted Porch Strategies  <b>Dysfunction To Dynamic</b></p>			
	<p><b>PROJECT MANAGEMENT</b></p>	<p><b>SHARED SKILLS</b></p>	<p><b>SHARED SKILLS</b></p>	<p><b>BUSINESS ANALYSIS</b></p>
<p>10:00 am - 11:00 am</p>	<p>Moving to Embodied Decision-Making  <b>Mark Hollingworth</b>                  Si Strategic Affairs</p>	<p>PM &amp; BA: the tandem that closes the strategy-execution gap  <b>Filip Hendrickx</b>                  Altershape</p>	<p>Heartfelt Humor: The Funny Side of Stress Management  <b>Phil Barth</b>                  Great Things Happen LLC</p>	<p>Just Beyond the Horizon: What's Next for Business Analysis?  <b>Vincent Mirabelli</b>                  Info-Tech Research Group</p>
<p>11:15 am - 12:15 am</p>	<p><b>Round Table Discussions: Unleashing Collective Wisdom: Sharing Best Practices in Business Analysis</b></p>			
<p>12:15 pm - 1:15 pm</p>	<p>Networking Lunch</p>			
<p>1:15 pm - 2:15 pm</p>	<p>Project Management Playbook: A Scorecard to Improve PM Maturity  <b>Donna Gregorio</b>                  The MITRE Corporation</p>	<p>Managing a Diverse Workforce  <b>Martin Fenelon</b>                  MSD Games, LLC</p>	<p>Product Centric Organisation: The Path to advancing People &amp; Value  <b>Bola Adesope</b>                  SixDots Growth Inc</p>	<p>The Neuroscience Behind the BA Mindset. The Human Thinking Processes Applied  <b>Trent Leopold</b>                  Analyst, CoD  <b>Fabricio Laguna</b>                  IIBA</p>
<p>2:30 pm - 3:30 pm</p>	<p>The Power of 'PPT' to Transform your PMO  <b>Mehul Shah</b>                  Universal Orlando Resort</p>	<p>Building and Maintaining Actionable Multi-team Plans  <b>Paul Herzog</b>                  Bitovi</p>	<p>Stand Out with your Brand Out: 5 ways you can leverage the learning from this conference so you can obtain more opportunities and visibility at work.  <b>Leslie Hughes</b>                  PUNCH!media</p>	<p>Story Maps that Work - Hands on Creating a Story Map  <b>Jennifer Battan</b>                  Out of the Box BA</p>
<p>3:45 pm - 4:45 pm</p>	 <p><b>Vincent Mirabelli</b>                  CBAP, MBB, PMP, Principal Research Director Info-Tech Research Group  <b>Navigating Toxic Waters: The Keys to Understanding Organizational Politics</b></p>			

## Workshop Descriptions

Wednesday, October 23 | 9:00am - 3:00pm

### “REAL NEEDS” INVESTIGATION – ELICITATION TECHNIQUES APPLIED

**Fabrcio Laguna**

CBAP, AAC, CPOA, PMP, MBA, Senior Advisor for the President and CEO, IIBA - The International Institute of Business Analysis

The term “elicitation” means to bring out, or expose. The requirements of a project are often hidden and must be elicited so that they can be understood, analyzed, and validated by all stakeholders. To act as a Business Analyst, the professional must be able to obtain this information from different elicitation techniques. Many of those will involve a complexity of communication and consideration of cultural, behavioral, and psychological factors. This practical workshop applies concepts through case studies that allow the student to apply the techniques during the course, thus increasing assimilation and memorization. The instructor makes use of theatrical techniques of role-playing

characters to simulate interview and meeting situations. Take responsibility for identifying “real” problems and opportunities using the investigative elicitation techniques presented in this workshop.

**Learning Objectives**

- Conducting investigative elicitation techniques.
- Encourage the Business Analyst to take responsibility for identifying the “real” problems and opportunities.
- Experience and learn how to deal with communication problems with different profiles of respondents in case studies with characters played by the instructor.

### CLOSING THE STRATEGY-EXECUTION GAP WITH AI

**Filip Hendrickx**

Founder, Altershape

Up to two-thirds of organisations struggle with turning their strategies into results, missing out on a potential performance increase of 60 to 100%. Yet without successful execution, the strategy is pointless. Indeed, strategy = execution. Where should strategy become reality? In change projects. With business analysis perfectly positioned to connect the dots from theory to practice, from idea to solution. Enter the strategic BA, who helps the team in finding answers to the following questions:

- How do you formulate good goals that guide

execution without restricting creativity?

- How do you deal with stakeholders that know the solution before having investigated the problem?
- What is the importance of deep listening, and how do you do it?
- Why do we need to think about options and alternatives, and how do you facilitate their discovery?
- Should we still be doing projects? Is there a better alternative?
- What are the strategic BA's new roles in a world where strategy = execution?

### CRACKING THE STRESS CODE: LESSONS LEARNED FROM A HEART ATTACK, A PM/BA JOB AND RAISING THREE SONS

**Phil Barth**

PMP, CEO, Great Things Happen LLC

We are all subject to stress. It takes a mental, emotional and physical toll. It impacts your productivity at work and your quality of life. Left unchecked it can send you to the hospital (it did to me) or worse. Learn (at least) seven ways to fight stress effectively, manage conflict and live a happier and more fulfilling life. You will have a lot of fun, and (even

better) earn 6 PDUs in the process!

**Learning Objectives**

- Laugh and have fun
- Lower stress immediately and in the future.
- Pick up tools to manage stress in the workplace and at home.



## Workshop Descriptions

Wednesday, May 8 | 9:00am - 3:00pm

### CREATE EXTRAORDINARY TEAMS: GO FROM CONFLICT TO CONNECTION

**Amy Yackowski**

Founder & Chief Evolution Officer, Painted Porch Strategies

People + Diverse Ideas = Conflict. Whenever you're collaborating with other people, conflict can and most likely will arise. During the Create Extraordinary Teams workshop, Amy Yackowski will show you how to better connect, collaborate, and handle conflict with your fellow humans in order to shift from dysfunctional struggles to dynamic, innovative,

and solution-focused success.

#### Learning Objectives

- Define and design the Elements of a Team
- Understand and address the Health of Your Team
- Design a Blueprint for Team Collaboration and Success

### PROJECT MANAGEMENT IS THE ANSWER! (BUT WHAT ARE THE QUESTIONS???)

**Daniel Simon**

Speaker / Career Coach, Where's Your Road, LLC

Utilizing project management methodologies can lead to successful project completion and implementation. How do we get there? By choosing the right methodology for the project, and maybe more importantly, by asking the right questions. Project instructions can often lead to necessary questions vital to the process of providing initial and ongoing direction. How do you present your questions to get the project launched? In this workshop, we will deep-dive into the questions to help you navigate project success. Sometimes, the questions come easy; the answers can be easy (hopefully!), vague, hard, or even long in coming - long past when the answers were needed to execute a proper decision to move

forward. Through presentation-inspired open discussion, we will explore fundamental and advanced aspects of project management, focusing on the critical questions that guide successful project execution. Participants ranged from novice project managers to seasoned professionals, providing a diverse mix of perspectives and experiences. As Project Managers, what we need to do is be specific in our questions to aid in the process of conjuring accurate responses. At times, the questions may be hard, and the project manager may need to deliver hard news. If you want to cultivate an accurate picture of your project, then initiate a better opportunity of information gathering through the right questions!



## Workshop Descriptions

Thursday, October 24 | 9:00am - 3:00pm

### BAZINGA! BIG BANG TECHNIQUES (NO JOKE!)

**Jennifer Battan**

CSM, CSPO, CBAP®, Cofounder, Chief Creativity Officer, Out of the Box BA

Our product approach was in a hot dense state, then fourteen million sprints began, the devs had started... wait, what?! Roadmaps began to cool, new users used the tools, features were prioritized - we built it - we built a solution! Needs, capabilities, unraveling the mysteries that all started with... analysis! With compliments to Dr. Sheldon Cooper and his band of merry scientists, and apologies to The Barenaked Ladies. How do you choose the techniques and approaches to understand strategy, capabilities, needs, details, and everything else that makes a product successful? It sounds as complex as string theory, right? It really isn't rocket science

(though sometimes we do need engineers). In this interactive session we'll unravel the mysteries of technique selection and learn how to better explore our product universe get to the right detail within analysis work. Classic Cooper zingers and shenanigans may ensue.

#### Learning Objectives

- Where do techniques come from, and how to select the right technique for the goal.
- Learn how to identify problems and determine outcomes, not just take an order.
- identify some classic big bang, impactful technique sequences that apply in many situations.

### COMMUNICATION IS EASY. WHY IS IT SO HARD?

**Steve Jones**

CBAP, Six Sigma Green Belt, Supervisor, Market Support Business Analysis, ISO New England

**Jennifer Bedell**

CBAP, SAFe POPM, FLMI, ACS, Mariner Innovations

If you're ready to tackle communication chaos or void like a pro, strap in because this workshop is for you! Delve into the complexities of communication and explore why effective communication can be challenging despite its apparent simplicity. Through interactive lessons and engaging exercises, participants will gain insights into building trust, influencing without authority, and resolving conflicts through effective

communication strategies.

#### Learning Objectives

- Influence stakeholders without formal authority
- Quickly resolve conflict using communication techniques
- Communicate more effectively by understanding the trust formula

### IMPLEMENTING HYBRID AGILE: TAKING THE BEST OUT OF BOTH WORLDS

**NK Shrivastava**

PMP, RMP, ACP, CSP, SPC4, ICP-ACC, CEO/ Enterprise Agile Coach, RefineM

Many organizations now combine aspects of predictive/Waterfall project management with aspects of adaptive/Agile to get the benefits of what both have to offer. Learn about models and best practices for effective hybrid approaches in this workshop.

#### Learning Objectives

- Understand the benefits of using a hybrid approach
- Identify when to use a hybrid approach and which approach to use
- Begin developing a hybrid approach tailored to their projects

## Workshop Descriptions

Thursday, October 24 | 9:00am - 3:00pm

### STRATEGIC DECISION-MAKING FOR PMS & BAS

**Mark Hollingworth**

President, 5i Strategic Affairs

Strategic decisions are the decisions that keep you up at night. The consequences of making the right decision (or not) are high. It is easier to procrastinate, to enter “analysis paralysis”, to not take a decision, than to stick your neck out and say “We are going to do this. And, if we are going to do this, it means we are not going to do that.” Such decisions can be career-enhancing, or career-ending. This workshop will help you take better strategic decisions in the future - and will help you get a better nights sleep!

#### Learning Objectives

- Better understand the differences between operational and strategic decisions in organizations
- Gain some key insights into our personal leadership and decision-making ability, style and preferences
- Learn some new, innovative strategic decision-making techniques in order to take better decisions in the future

### THE PRODUCT OWNER (PO) CRASH COURSE WORKSHOP: FUNDAMENTAL PRINCIPLES AND BEST PRACTICES FOR POS AND TEAM ANALYSTS

**Howard Podeswa**

CEO, Noble Inc.

Take this workshop to gain actionable guidance for improving your agile analysis and planning. Learn key tools and techniques to apply across your organization and gain experience applying them in hands-on workshops. You'll learn how to prepare features to maximize value delivery and reduce rework and delays; use hypothesis-testing and MVPs to direct investment and use story maps for release planning. If you are a Product Owner, Product Manager, or Business Analyst this course is for you.

test Leap-of-Faith Hypotheses and direct team effort towards the highest-value features.

- Understand Product Ownership (PO), its benefits and how it maps to an agile organization.
- Be able to prepare features effectively to focus the team on work of the highest value, and reduce rework and delays using techniques including ATDD/BDD, Minimum Marketable Feature (MMF), WSJF prioritization (Weighted Shortest Job First) and story-splitting patterns.

#### Learning Objectives

- Plan Minimum Viable Products (MVPs) to

*“Over the years, this experience remains the best combination of learning, networking, and venue that I attend. The symposiums and workshops are great. With their attention to detail, I continue to find the producers of the PS/BAW event provide the best experience. Keep up the good work! The attention to detail and consistency yield the best experience for the attendees. It's why we keep coming back.”*

Dana Safford, Hewlett-Packard

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International Institute of Business Analysis™ (IIBA®) is a professional association leading the global business analysis community to achieve better outcomes through better analysis. With over 30,000 Members and certified professionals, and more than 120 Chapters, 1,200 volunteers, and 500 partners worldwide, IIBA supports the recognition of the profession within organizations, enables networking and community engagement, provides foundational standards and resources, and offers internationally recognized certification programs for career advancement.



The IIBA Albany Capital District chapter is a not-for-profit organization that is strengthening the role of Business Analysts by providing educational, networking and certification opportunities to Upstate New York Business Analysis practitioners. The chapter was formally chartered in November 2008.



Serving Massachusetts, Rhode Island, New Hampshire, and Maine, the International Institute of Business Analysis (IIBA) Greater Boston Chapter was the first U.S. chapter established in March 2005. We currently have approximately 150 members and are actively seeking to grow this number. Our chapter is one of a rapidly growing international base supported by the overall IIBA organization. The goal of the Greater Boston Chapter is to advance the mission and objectives of the IIBA at the local level and to raise the profile of the Business Analyst role by promoting best practices and standards among like-minded Business Analysis professionals. An integral component of our chapter is ongoing learning and knowledge sharing. This is accomplished through presentations, seminars, and activities hosted by the chapter.



Established July 2006, the Hartford, CT Chapter is one of the oldest chapters in the United States. We host monthly presentations that are focused on a variety of business analysis topics ranging from novice to expert and covering all aspects of the Body of Knowledge. As a not-for-profit organization, we seek financial contributions from local companies that have or support the role of business analysts.

# 2024 CONFERENCES

