



# AI SIMPLIFIED

## INSIGHTS YOU CAN USE

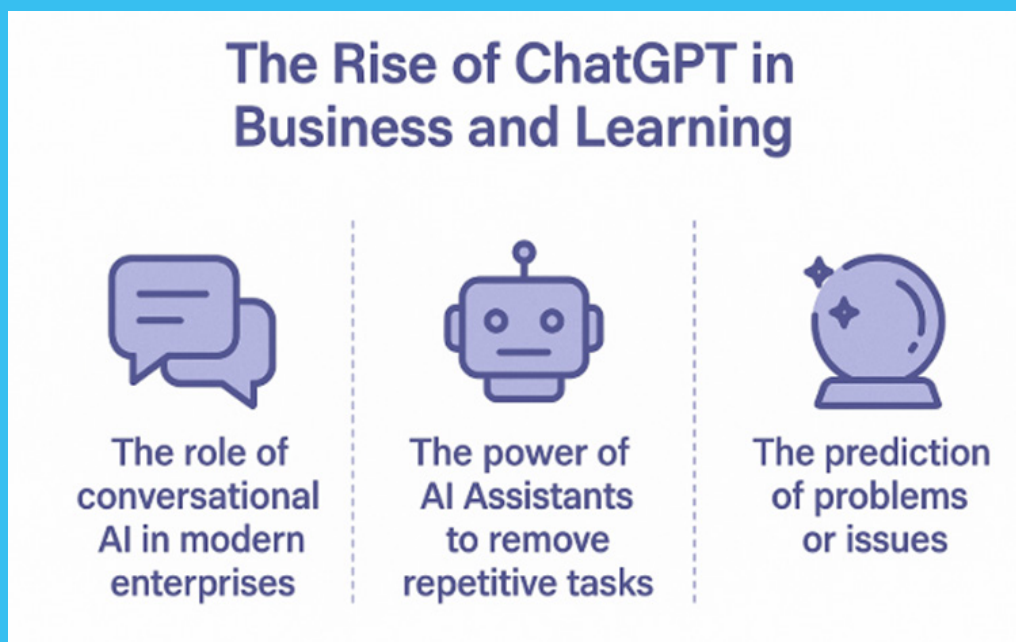


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SMALL BUSINESS

# UTILIZING AND BUILDING A CUSTOMIZED CHATBOT WITH CHATGPT

The role of chatbots and their engagement with business has exploded because both individuals and companies are realizing the enormous power of using artificial intelligence (AI). Because of this, learning the proper way to create and expand prompts has typically been the focus on getting Generalized AI to respond correctly and quickly. Learning prompt engineering is essential for anyone working with AI, but if one is only asking questions, they are only following baby steps in functionality.

## The Rise of ChatGPT in Business and Learning



### The Role of Conversational AI in Modern Enterprises

Conversational AI creates a shift from automation tools to something more intelligent and conversational. This changes the way a person interacts with the tools, offering real-life answers and guidance. According to Christison (2022), this is rooted in providing real-time answers and guidance to customers, which improves operational efficiency. These factors support why businesses want this technology, even though it is still evolving and has drawn back currently.

### The Power of AI Assistants to Remove Repetitive Tasks

AI-powered assistants, which automate or streamline repetitive tasks, reduce the workload of individual employees, enabling them to focus on areas that require more evaluation and verification. These tools operate 24/7, allowing project managers or executives to view project progress instantly, eliminating the need to wait hours or even days for feedback.

## The Prediction of Problems or Issues

These tools also employ predictive steps to alert project managers to potential issues that may arise before others become aware of them in the project. Forecasting and providing lead indicators with warnings gives the project manager more time to mitigate problems and, in many cases, to remove challenges before they occur. This leads to a time when the project typically incurs less money and effort, as everyone receives an early warning of the problem.

Because AI can forecast potential problems, it can help those tasked with resolving the issues by following the suggestions of solutions and processes for correction provided by AI. Each of these solutions and recommendations may also have flaws, but the tool enables a clear understanding of the problems and supports brainstorming action steps to mitigate challenges (Rajnerowicz, 2023).

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## Comparing When to Use ChatGPT on a Project

Another option to consider when customizing a chatbot is whether to create a new chatbot or to use the project setting within the existing chatbot. Since the project operates within the chatbot environment, it can be unclear when to use a standalone chatbot and when to rely on the project setting within the chatbot system.

### When to Use a Customized Chatbot

The customized chatbot is typically used in settings where the designer or user requires a quick one-off interaction, such as to perform specific tasks. Chatbots are primarily designed for personal and short-term use to facilitate quick and private collaboration. Typically, when using a customized chatbot, one does not expect versioning of a single document. Chatbots are efficient for producing a single output, such as a project charter or details on best practices for creating one.

### When to Use a Project Within a Customized Chatbot

The project setting appears in ChatGPT within the customized chatbot. This folder follows the same guidelines as the chatbot but functions under its own umbrella. The purpose of using a project rather than a customized chatbot is that the user expects the need for a larger workspace or to create multiple versions of a product. It allows the user to store all the information in one spot while following and using customized directions within a chatbot. The user can use the project setting for those jobs for weeks or months. Projects, by contrast, shine when you need to produce multiple deliverables from the same research base. An example of this is creating a monthly newsletter using the same core material or developing a research paper on an industry topic.

Using a project ensures continuity across sessions. Instead of re-explaining your goals each time you start a new chat, the project retains history, documents, and prior outputs in one environment. This persistence eliminates duplication of effort, making it easier to track progress, revisit ideas, and build depth into your work over the course of weeks or months.

# Benefits of Using a Customized ChatGPT in Project Environments

The benefits of using a customized ChatGPT in projects will vary based on the project, its goals and objectives, and the team's experience. However, there are two essential areas where projects can utilize ChatGPT, namely project communication and data-driven decision-making. These areas can enable AI to support and accelerate some of the everyday activities one undertakes, keeping all stakeholders informed and providing new and updated data in real time.

## Enhancing Project Communication

Communicating is a foundation for any project, but especially when the costs and expectations are high. Clear communication when answering questions and providing methodologies that work for the organization helps everyone complete projects faster, thereby increasing trust. This ensures that project managers and teams have access to quick and accurate information, which can reduce delays and miscommunication (Rajnerowicz, 2023).

Enhancing project communication by customizing a chatbot to provide specific information and data at regular intervals can help remove many decisions made based on knee-jerk or gut reactions. Real-time data eliminates the guesswork associated with next steps and reinforces what the project manager intended to happen next. If something goes wrong and is unknown to anyone, the AI will promptly notify the project team or project manager, providing them with an early warning for adjustments.

Sometimes, teams experience information gaps due to vendors or team members who fail to communicate their progress or challenges. ChatGPT can also provide contextual reminders about project goals, track task progress, and help reinforce alignment across distributed teams. This reinforcement reduces the risk of information gaps, especially in hybrid or remote project environments (Han, 2017).

## Supporting Decision-Making with Data Insights

A customized ChatGPT can be integrated with enterprise systems to pull current project data, synthesize trends, and present insights in plain language. Due to the power of AI, it is possible to communicate with technology experts using the terms they are familiar with and ask AI to create a report without technical jargon, making it accessible to business customers (Christison, 2022). These continuous feedback loops enable leadership to adjust project strategies and make informed decisions, while also staying current on the project's progress (Oesch, 2019).

## Designing the Customization Process

Customization involves using artificial intelligence to fulfill specific behaviors and actions. One of the initial milestones is defining what the user requires and then selecting or building the correct framework. Building this customization process creates an interactive process with multiple feedback loops, allowing for the adjustment of a chatbot's customized performance without requiring programming software knowledge.

This step typically begins by drawing out not just the wording of the internal guides for the chatbot but also how and where the documents will be used to train this tool. The document must remain secure, and permissions on what can be included in the training effort are important for customization.

In addition, what kind of metrics will allow the team to know the chatbot is working correctly and securely? The metrics for creating the chatbot are different from those for measuring the daily or moment-by-moment performance of the tool. This means that it is performing as intended, which requires new training with specific material to strengthen a weak performance point and enable it to function effectively.

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## Building Customized Chatbots

There are key areas to consider when building a chatbot. Each of these areas helps the user begin not just by writing stronger prompts, but also to create a tool that supports actions without a prompt. Initially, the process may feel overwhelming for the user; however, it is a method for customizing the chatbot that does not require the user to have programming knowledge.

### Understanding the Foundations of Custom Chatbots

#### Defining Intents, Entities, and Actions

Before building a customized chatbot, organizations must understand the building blocks of conversational AI. Intents define the purpose of a user's query, entities extract specific information, and actions determine the system's response. For example, in a project management setting, an intent might be "request project update," the entity could be "Project Phoenix," and the action would be delivering the latest project timeline (Bhattacharya, 2023).

By properly structuring these elements, chatbots can move beyond generic responses and deliver context-specific outputs. This architecture ensures that the chatbot understands not only what the user is asking but also the organizational context behind the request. A strong foundation of intents, entities, and actions enables customization to be scalable and reliable.

#### Rule-Based vs. AI-Driven Customization

Organizations can choose between rule-based chatbots that follow scripted pathways and AI-driven models, such as ChatGPT, that adapt dynamically. Rule-based bots are useful for straightforward workflows such as FAQs, but they lack flexibility when queries fall outside pre-defined rules. In contrast, AI-driven customization enables contextual interpretation and human-like conversation, which is crucial for knowledge-intensive fields such as project management (Christison, 2022).

# Comparison of Rules-Based and AI-Driven



## Rules-Based

Rule-based bots are useful for straightforward workflows such as FAQs, but they lack flexibility when queries fall outside pre-defined rules.



## AI-Driven

AI-driven customization enables contextual interpretation and human-like conversation, which is crucial for knowledge-intensive fields such as project management

Deciding between these approaches requires assessing organizational needs, risk tolerance, and budget. Most enterprises are moving toward hybrid systems that combine rule-based flows for compliance-critical tasks and AI-driven responses for exploratory queries. This balance allows for both precision and adaptability.

## Training Customized Models with Organizational Data

Training a customized chatbot makes a significant difference in how well it fulfills the organization's goals and objectives. Many are testing chatbots such as OpenAI, which uses the internet and open sources as its resources for its answers. However, this is typically not desired by the organization. The goal of using ChatGPT within the enterprise is to enable the chatbot to support the organization with customized information, as it was trained on that specific data.



To ensure accuracy, customized ChatGPT models should have access to secure organizational data, including historical records, policies, and strategic goals. ChatGPT uses this information as a foundation for making decisions and recommendations. These responses might be narrower than those coming from open sources, but they typically have a more precise connection to the desired outcomes.

Training a customized chatbot is not a one-time event but requires periodic adjustments as new information, best practices, or policies change. Continuous training helps the system adapt to new policies, tools, and employee feedback. Without this ongoing refinement, even well-designed chatbots risk becoming outdated and less effective (Bhattacharya, 2023). Some training courses can be scheduled as yearly updates, while others may be episodic, adjusting to changes in the workplace.

Leveraging internal knowledge bases enables the incorporation of industry-specific terminology within the answers, as well as best practices that have evolved over time. The evolution of these practices supports the iterative mindset and allows the movement of planning and customization in short intervals.

## Collecting and Adjusting Data for Training

Such integration and training require adjustments to the data so that it is readable by the AI tool. The challenge is that many organizations have enormous knowledge bases and repositories of past decisions, projects, and outcomes. However, the information may not follow a specific formatting structure that AI can read. This requires adjustments to the material and reformatting it to be readable in all situations.

Due to the lack of formatting, installing AI is a complicated process that requires multiple steps to complete. Projects may involve structures and require selecting the proper data, establishing processes for collection, and then ensuring the quality of the data.



### Select Data for Training

Customized ChatGPT requires training with data specific to the organization's goals and objectives. It is best to begin selecting the data for training in small steps to test the tool and verify that it responds correctly. Beginning with 10 to 50 samples may be enough for fine-tuning your AI tool after it is up and running. However, initially, the tools may require 100 to 500 samples before they reach a high level of efficiency.

This means allowing it to understand where it should pull information for any prompt or request. The type of data used for training will depend on the purpose of ChatGPT. For example, suppose the tool is designed to answer questions about the organization, its history, or to identify specific employees. In that case, it will require a different type of information compared to ChatGPT, which is trained on images or graphical information.

Examples of this include organizations that utilize ChatGPT for editing, emailing, and revising content, compared to a hospital using customized ChatGPT for reading X-rays or scanning test results and making recommendations to reduce patient risk.

## **Create Data Collection Techniques**

Creating data collection techniques and supporting this effort with processes is crucial for directing ChatGPT and ensuring it operates as expected. For some, these are new processes because the organization focuses on archiving information without structuring the data in a usable manner. Collecting the correct data may involve restructuring it for readability and usability with the AI tool.

After determining the processes for collecting the correct material, it is possible to verify that the data is diverse enough to accomplish the goals and outcomes. One drawback of some customized tools is that they often include only data that demonstrates success and positive outcomes. Using only positive data may skew the responses and not accurately represent the potential risks in the situations.

## **Ensure the Quality of the Data**

Because ChatGPT focuses on data, it can only perform well if the data is of the highest quality. High-quality data includes reduced bias, numerous examples, and the ability to fine-tune performance over time.

Bias must be addressed when customizing ChatGPT. If an organization has years of data, it may need to limit some of the older information and train the tool only on newer data. Older material may have been subject to different processes and biases in the decision-making process. This can distort the tool's outputs and provide inaccurate answers today. For example, using ChatGPT to screen potential employees could replicate historical bias in hiring decisions.

In addition to monitoring for bias in data collection, it is crucial to provide numerous examples so that the AI tool can learn how to function effectively and identify what is not relevant in specific cases. Examples should cover a wide range of scenarios that the tool might encounter. Narrow training or limited use cases can lead to underperformance, omitting important information and valuable suggestions.

Training the AI tool is needed periodically to update it with new information. Building proper processes for retraining at regular intervals or when performance begins to decline ensures reliability. Fine-tuning allows organizations to trust that responses are consistent and correct.

Such integration transforms the chatbot into a living knowledge base that evolves with the organization. Instead of relying on external general data, the model develops expertise in company practices, which

supports consistency and strengthens institutional memory. An iterative training cycle also ensures that chatbots learn from mistakes and improve accuracy. By monitoring performance metrics and retraining with updated data, organizations maintain relevance and ensure long-term sustainability of their customized models (Bhattacharya, 2023).

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## Ways to Use a Customized ChatGPT

Organizations are utilizing customized chatbots to enhance their operations in many ways, and as the technology matures, these uses will expand. Using chatbots for repetitive tasks is common, as well as training and transferring knowledge from the project team to the customer base. In project management, the most common use is to streamline workflows, automate status updates, identify risks, and create various documents, ranging from business cases to final lessons learned or retrospectives.

Because the tool can stay updated and provide real-time feedback to anyone on the project, it facilitates data-driven decision-making and effective communication. Team members and management make decisions based on facts and evidence, rather than gut feelings or assumptions. Instead, they are making decisions based on current data that is immediately available.

Allowing the customized chatbot to handle repetitive tasks frees up the project manager, enabling them to spend more time working with team members or vendors. This supports the need to prioritize critical duties.

## Understanding the Process for Customizing ChatGPT

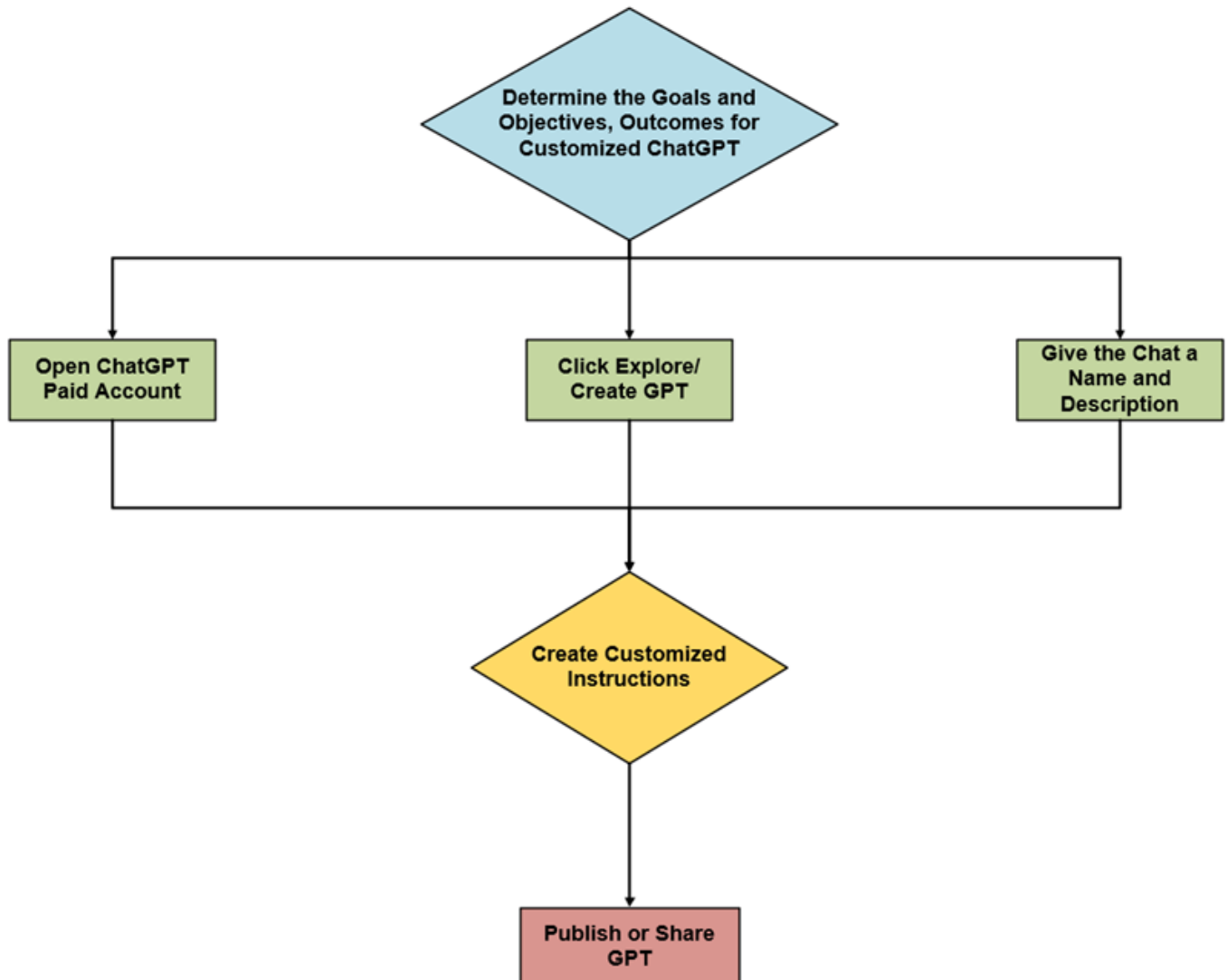
Customizing ChatGPT requires a paid subscription with OpenAI. This process provides an overview of the specific steps required to create the first chatbot. Before creating a chatbot, the organization or individual must determine the goals, objectives, and outcomes for customization. Without clear goals, it is possible to create a chatbot with conflicting objectives, which can reduce its functionality.

### Understand the process of creating GPT instructions

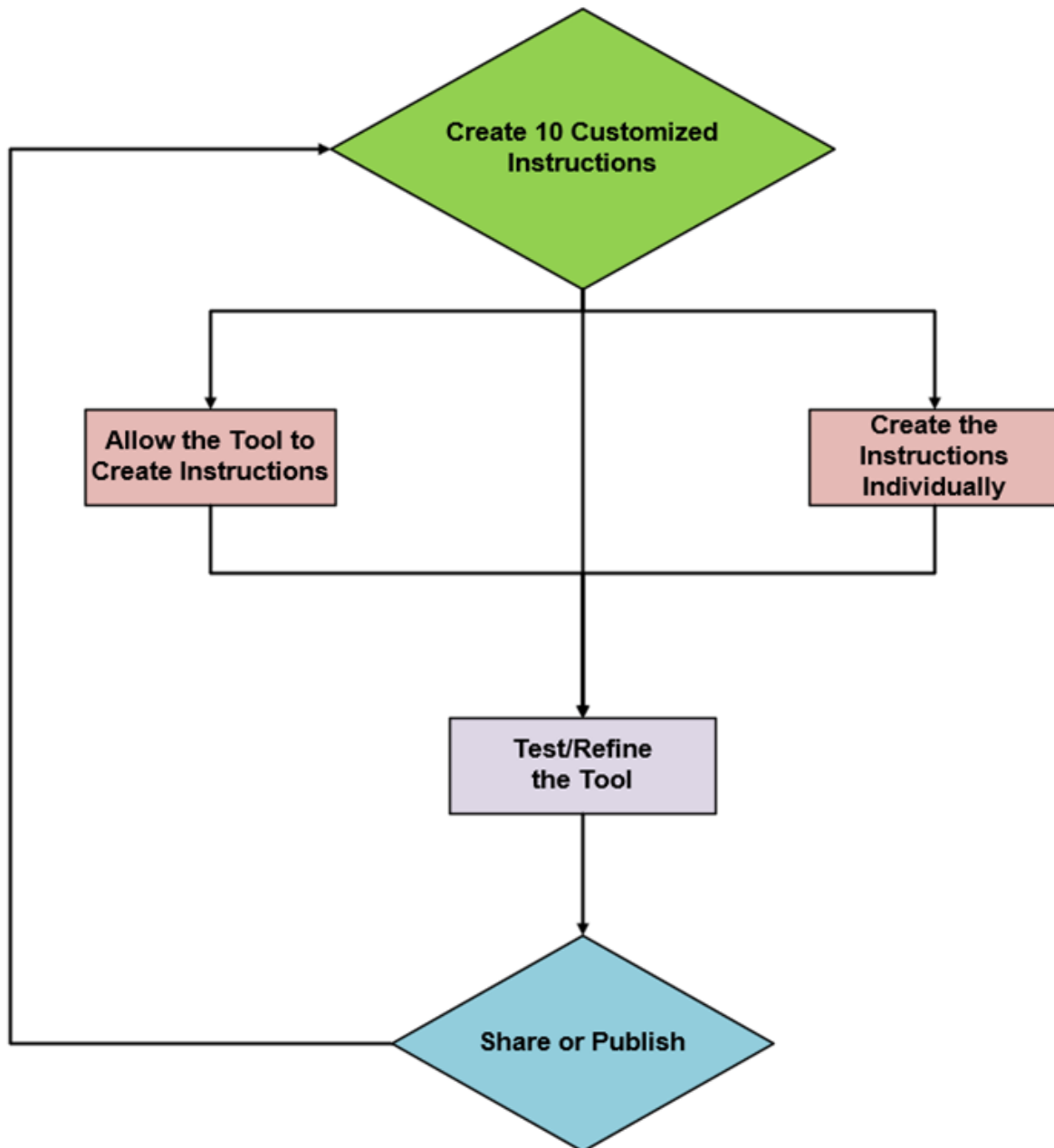
Creating 10 customized instructions for the chatbot helps focus the direction when setting up the program. Ensure that each instruction supports a single, direct goal and is clearly stated. After all 10 instructions are created, the chatbot's goal and purpose become clear. Other chatbots can then be created to perform additional tasks.

When preparing to place the instructions into the system, the designer will look for the Create button in the upper right-hand corner and can build the chatbot by writing specific instructions. Currently, the strongest chatbots are created by uploading personal directions and prompts.

## Process for Customizing ChatGPT



# Process for Creating GPT Instructions



## Creating your GPT (must be a paid subscriber to ChatGPT to use this feature)

In the ChatGPT app or at [chat.openai.com/gpts/editor](https://chat.openai.com/gpts/editor):

1. Click Explore GPTs > Create.
2. Give your GPT a name, description, and personality.
3. Optionally add:
  - A profile image
  - Custom instructions
  - Tools like web browsing, file uploads, or API actions

If your GPT uses a custom action that calls an external API, you must verify the domain and include a Privacy Policy URL.

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## Publishing your GPT

Once your GPT is ready:

1. Click Share or Publish.
2. Choose your visibility:
  - Private: Only visible to you
  - Anyone with the link: Unlisted, shareable via URL
  - Everyone: Listed in the GPT Store (requires verified Builder Profile)
3. Select a category (e.g., Productivity, Education).
4. Review how your name or domain will appear.

Click Publish to submit your GPT.

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## Review and approval process

Every GPT is reviewed before appearing in the Store. This includes:

- Automated policy checks
- Possible manual review if flagged

Most GPTs appear in the Store within minutes. Some may take longer depending on the content and review load.

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## Managing your GPT

You can:

- Edit your GPT at any time
- Unpublish it by switching visibility to Private or Link-only
- View usage analytics from the “My GPTs” dashboard

If a GPT is delisted for policy reasons, you will receive an email and may be able to appeal directly in the builder interface.

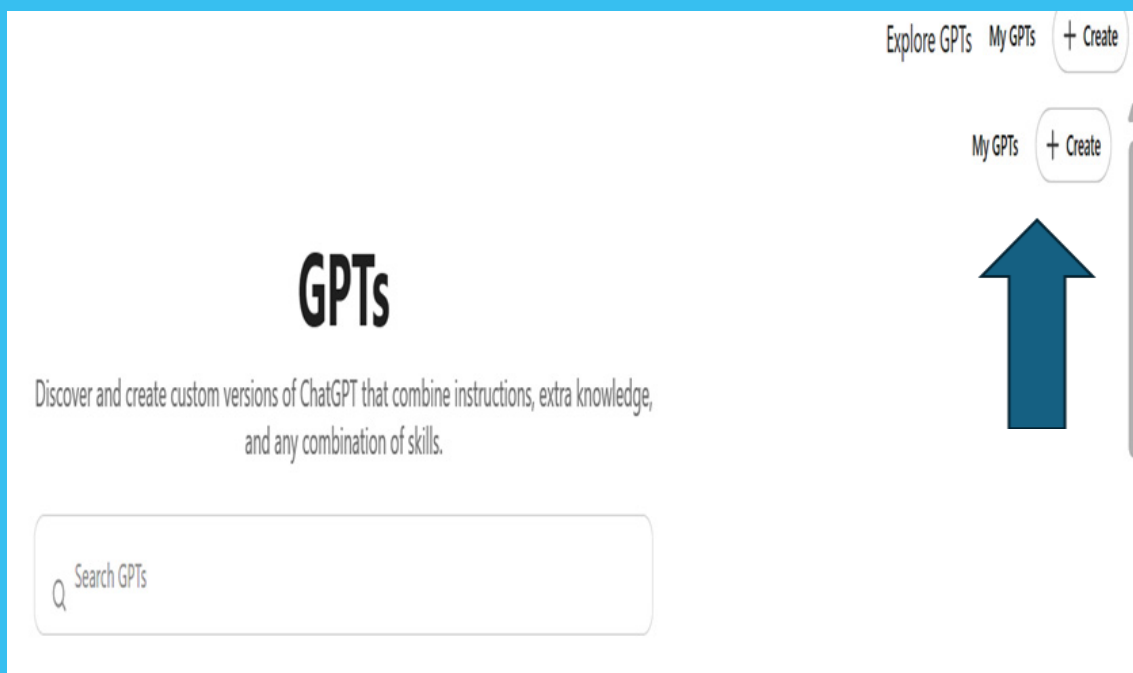
## Receiving feedback

If you enable “Receive feedback emails” in your Builder Profile:

- Users can send feedback about your GPT.
  - You will receive notifications to the email associated with your ChatGPT account.
  - You can turn off feedback emails anytime from the Builder Profile settings.
- 

## Screenshots for Customizing the Chatbot

Open the ChatGPT page and look to the right for My GPTs and the word Create. “Create” signals to the system for the creation of a customized Chatbot.



The system will ask questions, such as creating, configuring, and previewing. Creating is what one uses to create the customization the first time. After the initial creation of the customized chatbot, one can return and use the configuration selection to make the necessary adjustments and preview the changes to determine if they alter the behavior as desired.

Understanding the system can prompt you to answer questions throughout the training portion, and you set it up with each response. If you are not satisfied with your selection, you can adjust it by returning to the configuration section. Some questions might be what to name the chatbot, as well as other areas, such as the population you are reaching, grade level, or whether the writing should be professional, academic, or common language.

## What would you like to create?

Create

Configure

Preview

Hi! I'll help you build a new GPT. You can say something like, "make a creative who helps generate visuals for new products" or "make a software engineer who helps format my code."

What would you like to make?

Learn More

×

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## Better Approaches

On this screen, notice the description, instructions, conversation starters, and a knowledge and recommendation model. In the name section, the designer can choose any name, even if one with the same name already exists in that section. The descriptions are short details on what the GPT does. However, the instructions have details that dictate what and how the tool will behave. In the instruction section, the designer can create a personal prompt and test it for validity or use a prompt designer to create one.

Create

Configure

Preview

+

Name


Name your GPT

Description

Add a short description about what this GPT does

Instructions

What does this GPT do? How does it behave? What should it avoid doing?



Conversations with your GPT can potentially include part or all of the instructions provided.

Conversation starters

Help me draft a project charter for a new software rollout

×

What sections should I include in a project charter?

×

Can you refine this project scope statement?

×

Generate a template for a simple project charter

×

×

Knowledge

Conversations with your GPT can potentially reveal part or all of the files uploaded.

Upload files

Recommended Model

?

The following sample shows the name, description, and instructions for creating a project charter. One way to assist it in doing better is to refine the instructions by adding more specifics to create project charters the way one desires. Additionally, the chatbot features an upload button for knowledge. This allows you to train the chatbot with your files and research. In this case, you could upload a PDF of best practices for creating a project charter or peer-reviewed articles on the role and responsibilities of project charters.

ChatGPT allows the designer to determine which Model to use: GPT 4, 4o, or 5. Each model has strengths and weaknesses for specific actions. A comparison of the different GPTs is after the next set of graphics.

CreateConfigurePreview

Name

Project Charter Creator

Description

Helps you draft professional project charters with structured guidance.

Instructions

This GPT is designed to help users create clear and professional project charters. It guides them step by step, asking for details such as project purpose, objectives, scope, stakeholders, risks, constraints, timeline, and success criteria. It organizes the information into a structured, polished document suitable for formal use. If the user wants, it can generate a simple draft version or a more comprehensive version with detailed analysis. It avoids overly generic answers by asking clarifying questions whenever information is missing. The tone is professional, supportive, and precise, ensuring that users feel confident their charter is well-structured and complete.

Conversations with your GPT can potentially include part or all of the instructions provided.

Conversation starters

Create a project charter for a new website launch

Help me define the scope and objectives for my project.

Draft a project charter for an internal training program.

What sections should I include in a project charter for a software rollout?

Knowledge

Conversations with your GPT can potentially reveal part or all of the files uploaded.

Upload files

Recommended Model

Recommend a model to the user, which should be used by default for best results.

GPT-5

Capabilities

☒ Web Search

☒ Canvas

☒ Image Generation

☒ Code Interpreter & Data Analysis

Actions

Create new action



Share GPT

The option to share the GPT comes up after one is ready to preview it or begin using it. You can share the GPT with anyone or use it solely for yourself. One might consider using it temporarily alone until it becomes high-functioning and consistently performs correctly.

Share GPT

Only me

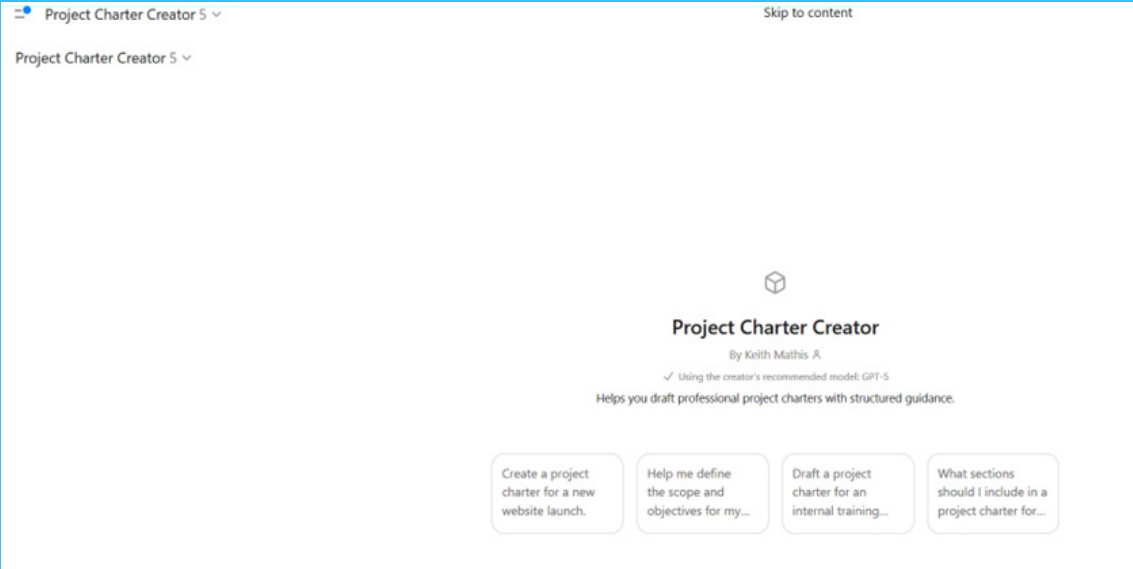
Anyone with the link

GPT Store

Save



The following page shows how the customized Chatbot will look once the tool is open for use. The rules and instructions for the tools are preset, eliminating the need to create a separate prompt for each activity or document.



ChatGPT Model Comparison for Customized Chatbots			
Feature	ChatGPT-4	ChatGPT-4o ("Omni")	ChatGPT-5
Core Strength	Stability & reliability	Real-time multimodal interaction	Advanced reasoning & personalization
Speed / Latency	Moderate; slower for long queries	Fast; optimized for real-time response	Improved over GPT-4 but slightly slower than 4o for short tasks
Reasoning Ability	Strong for structured Q&A and knowledge retrieval	Good; balanced with real-time performance	Highest; excels at complex, multi-step reasoning
Context Handling	Standard (~8k-32k tokens depending on tier)	Medium to long (handles multimodal inputs effectively)	Extended (longer memory, better continuity across sessions)
Multimodality	Text only	Text, images, audio, video	Text first, with advanced multimodal support in reasoning-heavy contexts
Best Use Cases	FAQ bots, customer support, academic Q&A, cost-sensitive deployments	Voice assistants, tutoring bots, interactive customer service, real-time collaboration	Executive assistants, strategic advisors, adaptive learning, complex project decision-support
Personalization	Limited (rule-based personalization required)	Moderate (voice/tone adaptation, some user awareness)	Strong (adaptive, nuanced, long-term personalization)
Scalability & Cost	Most cost-efficient for high-volume usage	Mid-range cost; balance of performance & multimodality	Higher cost; best for premium or mission-critical applications
Developer Ecosystem	Widely supported; stable API	Growing support; strong for real-time apps	Early adopter stage; cutting-edge but fewer external resources
When to Choose	If you need <b>predictable, affordable, text-based chatbots</b>	If you need <b>fast, natural, multimodal, real-time interaction</b>	If you need <b>deep reasoning, personalization, and long-term chatbot intelligence</b>

# Customize the Prompt to Test the Project Charter

## Prompt:

You are working as the Director of a Project Management Office. Create a detailed project charter for implementing artificial intelligence as a tool for updating project data and metrics. Give details through each section of a typical charter. Include sections for any of the best practices in creating a project charter for this type of project.

## Output:

### Project Charter

**Project Title:** AI-Powered Project Data and Metrics Update Tool

**Date:** [Insert Date]

**Project Sponsor:** [Insert Sponsor Name/Role]

**Project Manager:** [Insert PM Name]

**Version:** 1.0

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## 1. Project Purpose & Background

Organizations often face challenges with outdated, inconsistent, or incomplete project data in tracking systems. Manual updates are time-consuming, prone to errors, and reduce the reliability of decision-making metrics.

This project aims to leverage artificial intelligence to automate the collection, validation, and updating of project data across multiple systems, ensuring that project metrics remain accurate, timely, and actionable. By implementing AI, the organization will reduce administrative burden, improve data integrity, and enable more informed, real-time decision-making.

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## 2. Project Objectives

1. Automate Data Updates: Deploy AI to collect and update project data from multiple sources with minimal human intervention.
2. Improve Accuracy: Achieve at least a 95% accuracy rate in updated project metrics.
3. Enhance Timeliness: Ensure project data is refreshed at least daily, with near real-time updates for critical metrics.
4. Streamline Reporting: Provide automated dashboards and reports based on updated metrics, reducing manual report preparation by 50%.
5. Enable Scalability: Ensure the AI system can scale across multiple projects, portfolios, and business units.

### 3. Project Scope

#### In Scope:

- Design, development, and deployment of AI algorithms for project data updates.
- Integration with existing project management and reporting tools (e.g., MS Project, Jira, Power BI).
- Data validation, cleansing, and standardization processes.
- Development of automated dashboards and real-time reporting mechanisms.
- Training for staff on the use and oversight of the AI tool.

#### Out of Scope:

- Replacement of existing project management systems.
- Broader AI initiatives not directly tied to project data and metrics updates.
- Full enterprise-wide AI transformation outside the project management function.

### 4. Stakeholders

Role	Name/Department	Interest/Role in Project
Project Sponsor	[Executive Sponsor]	Provides funding & strategic oversight
Project Manager	[Assigned PM]	Oversees implementation & delivery
PMO Director	[Name]	Ensures alignment with portfolio management practices
IT Department	[Name/Group]	Provides system integration and technical support
AI/Data Science Team	[Name/Group]	Develops and trains AI models
Business Analysts	[Name/Group]	Defines requirements and test outputs
End Users	Multiple	Provides feedback on effectiveness
Change Management	[Name/Group]	Manages adoption, training, and communications

## 5. Risks & Mitigation

Risk	Impact	Probability	Mitigation Strategy
AI model inaccuracies in early stages	High	Medium	Pilot testing, phased rollout, human oversight initially
Integration issues with existing tools	High	Medium	Early technical assessment and vendor support
Resistance to change from project teams	Medium	High	Comprehensive training and change management plan
Data security & compliance concerns	High	Medium	Implement strict access controls, encryption, and audits
Cost overruns due to complexity	Medium	Medium	Regular budget reviews, phased implementations

## 6. Constraints

- Budget capped at \$[Insert Amount].
- Timeline limited to 6–9 months for full rollout.
- Must comply with organizational IT security and data governance standards.
- Requires alignment with existing PMO reporting processes.

## 7. Project Deliverables

- AI-enabled tool for updating project data and metrics.
- Integrated dashboards for real-time reporting.
- Documentation (user guides, technical manuals).
- Training sessions for end users and administrators.
- Pilot report with evaluation metrics and recommendations for scaling.

## 8. Timeline & Milestones

Milestone	Target Date
Project Charter Approval	Week 2
Requirements Gathering	Week 4
AI Model Development	Week 12
System Integration & Testing	Week 16
Pilot Implementation	Week 20
User Training	Week 22
Full Rollout	Week 26
Project Closeout	Week 28

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## 9. Success Criteria

- AI tool achieves ≥95% accuracy in data updates.
- Reduction of 50% in manual effort for project data entry.
- Project metrics are consistently updated within 24 hours of changes.
- Positive user adoption with at least an 80% satisfaction rate from project managers.
- Tool successfully scaled to at least three major business units within the first year.

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Since 1993, The Mathis Group has been helping organizations change worker productivity and behavior.

**PROJECT MANAGEMENT  
MARKETING  
MOTIVATION  
ORGANIZATIONAL BEHAVIOR  
LEADERSHIP  
CUSTOMER SERVICE**

### **COMPANY MANDATE**

The Mathis Group provides training and consulting that will impact the organization and individual while maintaining an outstanding reputation for success and integrity.

### **VALUES STATEMENT**

Every person has worth and should be treated with respect.

### **AREAS OF EXPERTISE**

- Curriculum Design
- Project Management
- Organizational Behavior and Development
  - Management
- Agile Project Management
  - Strategic Planning
  - Executive Coaching
    - Performance
    - Team Building
- Emotional Intelligence
  - Leadership
  - Customer Service
  - Supervisory Leadership
  - Hybrid Project Management

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