

**PROJECT  SUMMIT**  
**BUSINESS ANALYST WORLD**

# **FUTURE FORWARD**

**BOSTON, MA**

OCTOBER 16-19, 2023

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- 1 EARN UP TO 17 PDUs AND CDUs
- 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, it's important to remind you attendees can claim one credit for every hour of education, up to 22 in total over 4 days, which goes a long way to renewing 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](mailto:aruddell@macgregorcom.com)



# 2023 KEYNOTE



KEYNOTE

## Fry Your Chickens!

**PHIL BARTH**

PMP, SPEAKER / AUTHOR, GREAT THINGS HAPPEN, LLC

OCTOBER 16 | **8:30AM - 9:45AM**

There's something inside of us that stands between all of us and success at work, success at home and success in life. It is a flock of chickens. Chickens like fear, negativity and self doubt. Every time Phil Barth wanted to accomplish anything worth accomplishing, he had to fry a chicken. As a result of frying chickens... -Phil won \$32,000 on Who Wants to Be a Millionaire. -Phil got that first date with the woman who became his wife. -Phil was even able to ride a roller coaster with his son for two minutes without throwing up. It would have been perfect... if only the roller coaster ride hadn't been 2:20. You will laugh for an hour. And you will leave this Keynote with homework: One chicken that you are going to fry. One step that you will take toward making a dream come true.



KEYNOTE

## Productivity Hacks... and Ways to Clear the Clutter

**JAMIE CHAMPAGNE**

BUSINESS ANALYST, CHAMPAGNE COLLABORATIONS

OCTOBER 16 | **2:30PM - 3:30PM**

Is there too much clutter preventing you from accomplishing your goals? Does the day come and go with you feeling like nothing was completed? Lets clear the mess and work some productivity back into the routine! Lets get out of the meeting overload and back to managing our projects! Lets actually have time for quality analysis that provides valuable solutions! Let Jamie walk you through how simple productivity hacks can bring more time in your day for meaningful work. Lets explore how to avoid "soul suckers" and energize you and your teams to be successful in delivering value daily!



# SPEAKERS



KEYNOTE

## Say WHAT?! Assertive Communication Skills to Step into Your Power

**GLYNIS DEVINE**

PRESIDENT AND CHIEF EMPOWERMENT OFFICER (CEO), SHE-SUITE LEADERS

OCTOBER 17 | **8:30AM - 9:45AM**

Do you find that what you say to some people is definitely NOT what they hear?! While others, could finish your sentences for you - like they 'get you'? Communication... it's the root of all relationships - and challenges! In a world where leaders are continuously being asked to do more, with less, effective respectful, assertive communication has never been MORE necessary for collaboration and high performance. As a Purpose expert, I start at the core.. Core Motive. It's the science behind why we do what we do. When we understand the motive behind someone's message, we can: Reduce conflict Engage advocacy Increase effectiveness Influence change Reduce bottlenecks - and stress!



KEYNOTE

## Purple Cow Leadership: Stand Out as An Effective Leader

**SABY WARAICH**

PMP CSM, CIO | CISO, CLACKAMAS COMMUNITY COLLEGE

OCTOBER 17 | **2:30PM - 3:30PM**

What does it take to be a Stand Out leader? Leadership isn't the easiest path, but it is a meaningful and potentially rewarding one. How can you lead through your actions - with or without an authority? What makes some leaders stand out from the crowd? The Purple Cow Leader has willing followers. Create positive morale, energy, and successful projects. Learn how to become the best leader you can be. It's not good enough these days to be a great leader, be a stand-out leader.



# Schedule at-a-glance

## Monday October 16

|                     |  |  |  |  |
|---------------------|--|--|--|--|
| 7:30 am - 8:30 am   | Networking Breakfast   |  |  |  |
| 8:30 am - 9:45 am   |  <b>Phil Barth</b><br>PMP, Speaker / Author, Great Things Happen, LLC<br><b>FRY YOUR CHICKENS!</b>  |  |  |  |
|                     | PROJECT MANAGEMENT   | SHARED SKILLS  | SHARED SKILLS  | BUSINESS ANALYSIS  |
| 10:00 am - 11:00 am | <b>Building a High-Performing PMO: Strategies for Success</b><br><br><b>Dr. Jimmy Godard,</b><br>DM, MBA, PMP, Goal Success Coach, Sr. Change, Delivery, Program Management, Global Compass, LLC                                     | <b>From Chaos to Collaboration: Effective Conflict Resolution Skills</b><br><br><b>Margo Krukonis,</b><br>PMP, CSM, Associate Principal Project Manager, Magenic, Inc  | <b>Let's Talk About SaaS, Baby!</b><br><br><b>Wendy Spears,</b><br>PMP, Consultant, Inspira Management Ltd   | <b>Do you want to meet Emily in Paris or Escape from New York? Plan your Roadmap with key Prioritization Techniques</b><br><br><b>Mindy Bohannon,</b><br>CBAP, BA, Excella |
| 11:15 am - 12:15 pm | <b>Project Managers are Makers; Change Managers are Shakers!</b><br><br><b>Alex Stanisic,</b><br>Owner, Robust Services (Management Consulting)  | <b>Ahoy, Swashbuckling Producteers - How Business Analysts, Product Owners, and Product Managers Work Together</b><br><br><b>Paul Crosby,</b><br>CEO & Co-Founder, The Uncommon League - The Uncommon Foundation | <b>Bad Things Happen! The Ending Can Be Great!</b><br><br><b>Judy Alter,</b><br>CBAP, FLMI, ACS, HIA & PCS, CEO/Owner, Judy Alter Speaker & Business Analysis Services LLC   | <b>Hammer it Home! Update Your BA Toolbox</b><br><br><b>Jennifer Bedell,</b><br>Mariner Innovations  |
| 12:15 pm - 1:15 pm  | Networking Lunch   |  |  |  |
| 1:15 pm - 2:15 pm   | <b>Communication Plan – the Best-Kept Secret to Project Success</b><br><br><b>Greg Busby,</b><br>CBAP, VP Business Development, Norveld Business Systems<br><br><b>Lloyd Weber,</b><br>MS, Principal, Norveld Business Systems, Inc. | <b>Building a Culture of Continuous Improvement: A Tragedy in Three Acts</b><br><br><b>Vincent Mirabelli,</b><br>CBAP, MBB, PMP, Principal Research Director, Info-Tech Research Group                           | <b>The Future is Here: Let's Talk about how Robots are now Able to Write Copy and Create Images</b><br><br><b>Leslie Hughes,</b><br>LinkedIn Specialist, LinkedIn Profile Writer and the Principal of PUNCH media! | <b>Business Architecture: How is It Relevant to Business Analysts?</b><br><br><b>Li Yang,</b><br>CBAP, Principal, iACT Consulting  |
| 2:30 pm - 3:30 pm   |  <b>Jamie Champagne</b><br>Business Analyst, Champagne Collaborations<br><b>PRODUCTIVITY HACKS... AND WAYS TO CLEAR THE CLUTTER</b>               |  |  |  |
| 3:45 pm - 5:00 pm   | Networking Reception and Sponsor Showcase  |  |  |  |



# Schedule at-a-glance

## Tuesday October 17

|                     |   |  |   |  |
|---------------------|---|--|---|--|
| 7:30 am - 8:30 am   | Networking Breakfast  |  |   |  |
| 8:30 am - 9:45 am   | <div><div><b>Glynis Devine</b><br/>President and Chief Empowerment Officer (CEO), She-Suite Leaders<br/><b>SAY WHAT?! ASSERTIVE COMMUNICATION SKILLS TO STEP INTO YOUR POWER</b></div></div> |  |   |  |
|                     | PROJECT MANAGEMENT  | SHARED SKILLS  | SHARED SKILLS   | BUSINESS ANALYSIS  |
| 10:00 am - 11:00 am | <div>Everything I Needed to Know about Project Management, I Learned While Wearing Adult Diapers<br/><b>Phil Barth,</b><br/>PMP, Speaker / Author, Great Things Happen, LLC</div>   | <div>The Agile Building Block "User Story"<br/><b>Salah Jaber,</b><br/>Agile Coach, Certified Scrum Master, PMP, MS EE, Director of Product Management, Device42</div> | <div>"What If I Don't" : Challenge Your Mindset And Prioritize What You Value Most<br/><b>AJ Hawley,</b><br/>PSMI, Principal Consultant, Trendsparency</div>  | <div>Elicitation by Example<br/><b>Jennifer Battan,</b><br/>CSM, CBAP, Chief Creativity Encourager, Out of the Box BA/ The Uncommon League</div>   |
| 11:15 am - 12:15 pm | <div>Look At Those Fries! Is This A Question Of Quality or A Question of Value?<br/><b>Daniel Simon,</b><br/>Speaker / Career Coach, Where's Your Road, LLC</div>   | <div>Bringing The Agile Mindset No Matter Where Your Projects Take You!<br/><b>Jamie Champagne,</b><br/>Business Analyst, Champagne Collaborations</div>               | <div>Spy vs. Spy<br/><b>Vincent Mirabelli,</b><br/>CBAP, MBP, PMP, Principal Research Director, Info-Tech Research Group<br/><b>Hans Eckman,</b><br/>Principal Research Director, Into-Tech / Eckman Guides</div> | <div>Case Study: Visualizing data in context for a theme park operator<br/><b>Scott Helmers,</b><br/>Partner, Harvard Computing Group</div>  |
| 12:15 pm - 1:15 pm  | Networking Lunch  |  |   |  |
| 1:15 pm - 2:15 pm   | <div>PM's Secret to Delivering Faster than Agile<br/><b>Robin Goldsmith,</b><br/>President, Go Pro Management, Inc.</div>   | <div>So, You Want to be a Speaker?<br/><b>Hans Eckman,</b><br/>Principal Research Director, Info-Tech / Eckman Guides</div>  | <div>Strategic Failures - Deconstructing Strategy into Capabilities and Requirements<br/><b>Paul Crosby,</b><br/>CEO &amp; Co-Founder, The Uncommon League - The Uncommon Foundation</div>                        | <div>The Modern Business Analyst - With Vince &amp; Jamie<br/><b>Vincent Mirabelli,</b><br/>CBAP, MBP, PMP, Principal Research Director, Info-Tech Research Group<br/><b>Jamie Champagne,</b><br/>Business Analyst, Champagne Collaborations</div> |
| 2:30 pm - 3:30 pm   | <div><div><b>Saby Waraich</b><br/>PMP CSM, CIO   CISO, Clackamas Community College<br/><b>PURPLE COW LEADERSHIP: STAND OUT AS AN EFFECTIVE LEADER</b></div></div>                          |  |   |  |



# Workshop Schedule at-a-glance

Wednesday October 18 | 9:00am - 4:00pm

## DELIVERING COMPLEX PROJECTS

**Saby Waraich**

PMP CSM, CIO | CISO, Clackamas Community College

Large-Scale Technology Projects especially in public sector are complex and challenging. There are multiple factors that makes a project or a program complex. Gain an insight into how public sector projects are different and what makes them so complex. Come and learn about an exciting turnaround of a public sector project that went on for almost a decade with multiple failures. What were some of the key strategies used to make this project successful? How can you use some of the learnings from this experience to manage your projects more effectively and deliver value to the customer?

### Learning Objectives

- Actionable tips that can be used by those who are managing complex projects or will be managing one in the future
- Enhance professional knowledge around driving large & complex transformations.
- Gain insight into complexities and challenges in a public sector technology project

## IMPROVING FROM THE INSIDE: CREATING POSITIVE CHANGE WITHOUT AUTHORITY

**Hans Eckman**

Principal Research Director, Into-Tech / Eckman Guides

Take a second and think of three things you'd change in your org if you could make them magically happen. You found multiple things that could be better in less than five seconds. Ideas aren't the problem, implementing them is. Although it feels like changes can only be made top-down, we can influence and improve our teams, processes, and organization from the ground up. We just need to shift our approach and tactics.

### Learning Objectives

- Understand why some changes are harder to make and better ways to approach them
- Build a change framework to guide and support your destination postcard
- Build a stakeholder management plan to align teams to your desired outcome.





# Workshop Schedule at-a-glance

Wednesday October 18 | 9:00am - 4:00pm

## IN YOUR FACE: FACILITATION, ANALYSIS, COLLABORATION & ELICITATION TECHNIQUES

**Jennifer Battan**

CSM, CBAP, Cofounder, Chief Creativity Officer,  
Out of the Box BA/The Uncommon League

- This interactive, highly hands on workshop not only teaches us how to use modern collaborative and interactive techniques for Facilitation, Analysis, Collaboration & Elicitation (FACE) but we'll also talk hybrid facilitation, agile vs plan-driven applications, and so much more. These tools will help improve the quality of your products and help you elicit requirements more effectively. You'll have everyone talking about how great YOU are as a Business Analyst leader.

### Learning Objectives

- Learn & practice proven techniques for Facilitation, Analysis, Collaboration, & Elicitation
- Identify ways to modify your approaches whether you're working in plan-driven, agile, or some method in between
- Identify tools & approaches for virtual and hybrid scenarios

## PROJECT PORTFOLIO MANAGEMENT (PPM) – WHAT IS IT AND HOW TO IMPLEMENT IT?

**Jen Skrabak**

PMP, PFMP, Vice President, Strategy+PM LLC

Most organizations face the problem of too many projects and not enough resources to execute them successfully. There is a solution - Project Portfolio Management (PPM)! PPM can help an organization focus on selecting the right projects that is aligned to strategy, optimizing them to maximize value, and ensuring that the portfolio is managed holistically, adequately resourced, and governed. Research has shown that portfolio management can be an effective way to bridge the gap between strategy and execution, ensuring that the right projects are done. In this highly interactive workshop, learn the key principles of portfolio management, how to align it to your organization's current project management and

Agile practices, and most importantly, walk away with an action plan to implement PPM in your organization.

### Learning Objectives

- Understand Portfolio Management and its relationship to Project Management, Program Management and Agile practices
- Understand Portfolio Management and its relationship to Project Management, Program Management and Agile practices
- Create an Action Plan to implement Portfolio Management in your organizationpublic sector technology project

## ROBOTIC REQUIREMENTS: BUILD YOUR OWN DIGITAL ASSISTANT.

**AJ Hawley**

PSM1, Principal Consultant, Trendsparency

- As a Business Analyst, I want to build a digital assistant so that I can skip the tedious tasks, maximizing my influence across the business. That's exactly what this workshop will offer. We will be focusing on the Microsoft platform, using Microsoft Teams, SharePoint Lists, and a collection of Office365 applications to automatically create User Stories in Azure DevOps. As analysts, we know that one elicitation method or process may not work for each team or project.

At the end of the session you will have built several methods for not only procuring requirements but will have built automation to handle them all. Let the robot uprising begin! Requirements: Each individual will need to bring a laptop

PROJECT  
MANAGEMENT

BUSINESS  
ANALYSIS

SHARED

AGILE



# Workshop Schedule at-a-glance

Thursday October 19 | 9:00am - 4:00pm

## COMMUNICATING WITH CONFIDENCE: HOW TO IMPROVE YOUR PUBLIC SPEAKING SKILLS AND BECOME MORE PERSUASIVE WITH BOTH YOUR

Did you know people are more afraid of public speaking than they are spiders, heights, and the dark? Yet communication is a crucial skill that everyone needs to have, whether you are influencing peers or convincing senior executives to say "yes"? This session will cover both in person and written communication so you can:

- Communicate "up" to senior executives - Sell your idea to teammates. - Deliver bad news and manage crises
- Stay on top of messages In this fun and interactive session, you'll learn how to communicate with ease and authority.

### Leslie Hughes

LinkedIn Specialist, LinkedIn Profile Writer and the Principal of PUNCH media!

### Hans Eckman

Principal Research Director, Into-Tech / Eckman Guides

### Learning Objectives

- Learn how to communicate "up" to senior executives
- Discuss how to sell your idea to teammates.
- Find ways to deliver bad news and manage crises

## MAKING YOU A LEADER: FAST TRACK WORKSHOP

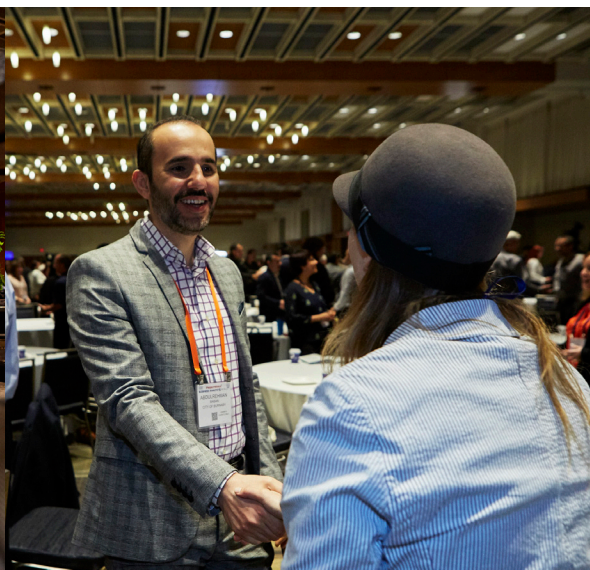
Regardless of role, you can provide leadership your projects need; but traditional training won't make you a leader. That takes special techniques over time to change deep-seated behaviors to ones leaders need. Following the formal class, participant partners carry out a follow-on mini-clinic using time-condensed methods that simulate the lifetime learning which makes a leader. Therefore, commitment to carrying out these exercises is essential for successful transformation.

### Robin Goldsmith

President, Go Pro Management, Inc.

### Learning Objectives

- Identify leadership characteristics and practices that are essential for project and personal success
- Recognize behaviors leaders use to influence others, up and down, to want to do what the leader wants them to do, even in the absence of formal authority or ability to dispense tangible rewards
- Employ special techniques in a follow-on mini-clinic to change lifetime learning and develop the leadership skills needed to make projects and followers successful





PROJECT  
MANAGEMENT

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### PROJECT MANAGER'S TOOLBOX 2023

**Daniel Simon**

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

This workshop will elevate your project management skill set beyond the easy button of spreadsheets and software programs.

#### Learning Objectives

- Broaden perspective of the tools needed to lead projects
- Establish a positive framework for the execution of project processes
- Emphasize the value of detailed communications in project management

### THE WHO, WHAT, WHEN, WHERE, WHY (AND HOW!) OF REQUIREMENTS

**Jamie Champagne**

Business Analyst, Champagne Collaborations

Let's dive into requirements from a view you've probably never seen. Come explore all the shapes, forms, and evolutions that captured requirements can take. And let's get some hands on practice diving into HOW to pull out this information so that your facilitation session is never compared to a painful dental procedure! Join Jamie as she walks you through the very techniques you can immediately apply!

#### Learning Objectives

- Understand the multiple facets of requirements (and what "required" actually means!)
- Learn techniques for eliciting and managing requirements
- Gain tips and tricks to immediately apply to requirements in your own work





# REGISTER TODAY

## Register Before September 8 to Save!

| PACKAGES   | INDIVIDUAL                      |            | GROUPS OF 3+                   |            |
|--|---------------------------------|------------|--------------------------------|------------|
|  | EARLY BIRD<br>Until September 8 |            | REGULAR<br>September 9 Onwards |            |
| 4 Day Pass<br>(Includes 2 Symposia days and 2 Workshops)     | \$2,692.56                      | \$2,423.30 | \$2,991.74                     | \$2,692.56 |
| 3 Day Pass<br>(Includes 2 Symposia days and 1 Workshop)      | \$2,062.39                      | \$1,856.15 | \$2,291.54                     | \$2,062.39 |
| 2 Day Pass<br>(Includes 2 Symposia days)                     | \$1,255.58                      | \$1,130.02 | \$1,395.08                     | \$1,255.58 |
| 2 Day Workshop<br>(Includes 2 Workshops)                     | \$1,623.18                      | \$1,460.86 | \$1,803.53                     | \$1,623.18 |
| 2 Day Combo Pass<br>(Includes 1 Symposia day and 1 Workshop) | \$1,513.38                      | \$1,362.04 | \$1,681.53                     | \$1,513.38 |
| 1 Day Symposium Pass<br>(Includes 1 Symposia day)            | \$727.56                        | \$654.80   | \$808.41                       | \$727.56   |
| 1 Day Workshop Pass<br>(Includes 1 Workshop)                 | \$983.45                        | \$885.11   | \$1,092.73                     | \$983.45   |

All registrations are on an individual basis. Badge sharing is not allowed.  
NOTE: Continental breakfast, breaks and lunch are included with registration!





# LOCATION AND ACCOMMODATIONS



## Boston Marriott Burlington Hotel

One Burlington Mall Road, Burlington, Massachusetts 01803 USA

Call 781-229-6565 and quote PS/BAW Boston 2023 or [Click Here](#) to book online.

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As we welcome you back to our hotels around the world, we are committed to providing you with a safe environment that aligns with expert protocols for working to defeat COVID-19. Consisting of in-house and outside experts in food and water safety, hygiene and infection prevention, and hotel operations, our Marriott Cleanliness Council is redefining our cleaning and safety standards. We will actively monitor and evolve our solutions to ensure a continued focus on the health and safety of our guests and associates.

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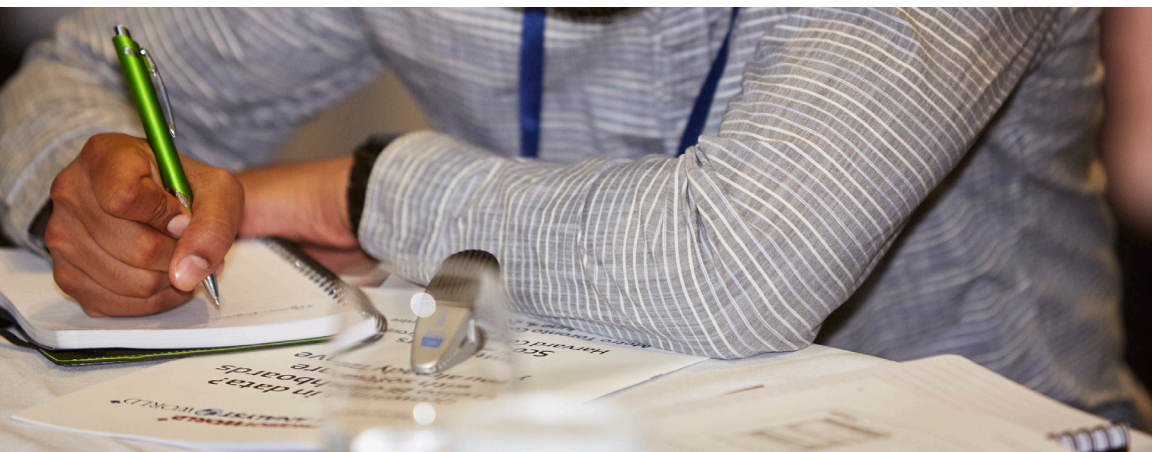
## CORPORATE PROGRAM

Organizations registering 3 or more attendees receive group discount rates. If your company is interested in this special offer, please contact me directly!

Jennifer White

E: [jwhite@macgregorcom.com](mailto:jwhite@macgregorcom.com)

Include "PS\*BAW Boston Group Inquiry" in the subject line.





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