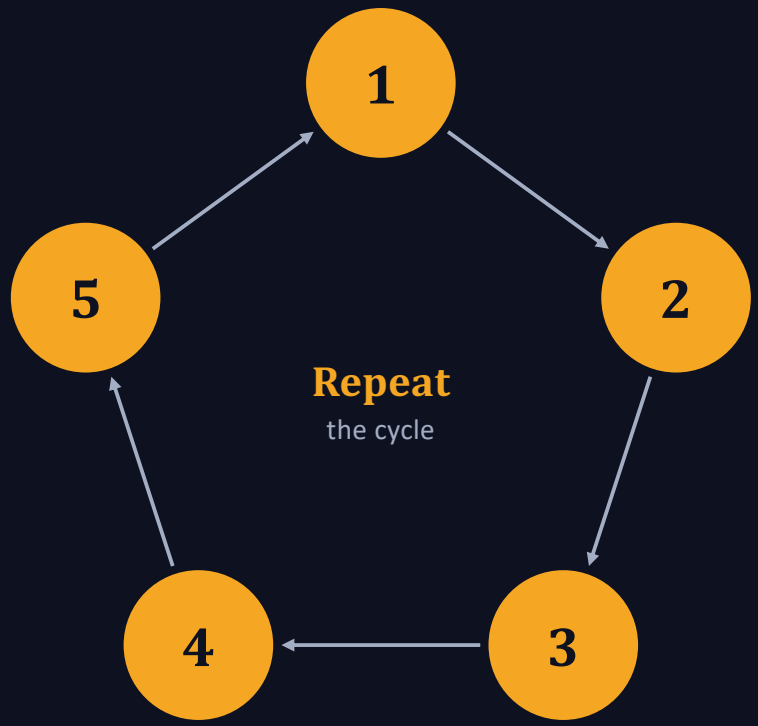
PMI AUSTIN CHAPTER · FALL 2026 PROFESSIONAL DEVELOPMENT DAY

Check Your Mind

A Five-Step Cycle for Stress-Testing Projects with AI



Gary Thompson

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Developed by Gary Thompson with the assistance of AI (Claude, Anthropic).
Views expressed are my own and do not represent the U.S. Department of Veterans Affairs.

Agenda

- Introduction
- 1 **Clear Your Mind and Stay Curious**
  The Scout Mindset
- 2 **State the Facts**
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  The power of questions
- 4 **Question and Challenge with AI**
  The AI Box
- 5 **Update the Plan**
  Close the loop
- Wrap-Up and Takeaways
- Questions and Discussion

About Me



Majored in Philosophy, English, and Sociology.



Taught English in Asia.



20 years in Project Management.



Team Director in the Project Management Center of Excellence, Office of Information Technology, Department of Veterans Affairs.

Views expressed are my own and do not represent the U.S. Department of Veterans Affairs.

SHOW OF HANDS · ON ZOOM: REACTIONS OR CHAT

About You

01

How many people use AI tools in your project work daily?

02

When something goes sideways on a project, does your team usually catch it early, or does it tend to surface later than you'd like?

03

On a scale of 1-5 to 1 being skeptical 5 is confident, how do you feel about trusting AI's judgment on something as messy as project risk?

04

How many people have over 5 years of experience in project management?

OUR THEME

Aligning critical thinking skills with AI to develop projects that are grounded in reality.

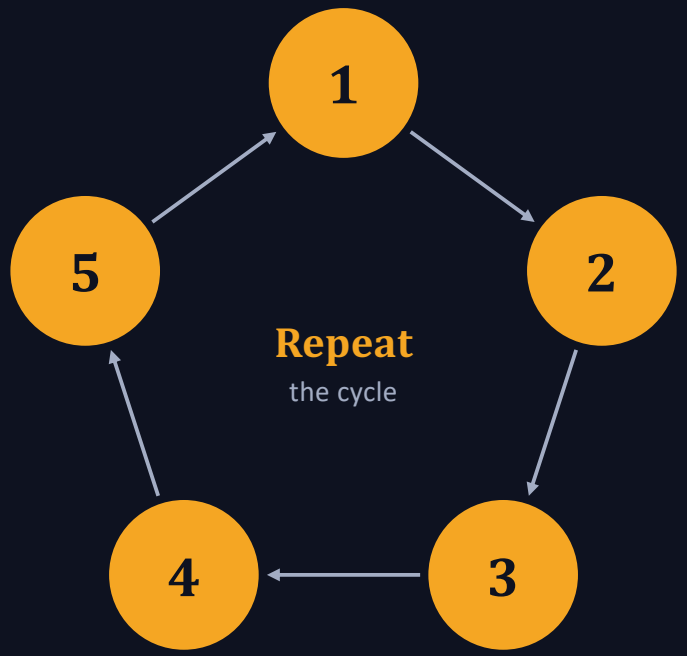
- Equip ourselves with critical thinking outlook.
- Generate the questions and prepare our prompts.
- Treat AI as a critical-thinking partner, not an oracle or confirm biases.

> *AI can inform decisions, but people must interpret its outputs and remain accountable for the consequences.*

— Kathleen Walch, CPMAI

Director, AI Engagement and Community, PMI · PMI Blog

Overview



1 **Clear Your Mind and Stay Curious**
Quiet your assumptions. Start curious, not certain.

2 **State the Facts**
Separate what you know from what you assume.

3 **See the Unknown**
Stay open to the gaps, then turn them into questions.

4 **Question and Challenge with AI**
Use AI as a counterpoint to pressure-test the plan.

5 **Update the Plan**
Fold learnings back in. Then go around again.

What You Will Learn

1 Think critically about your projects. STEP 1-3

2 Create challenging and useful prompts. STEPS 1-4

3 Use AI to stress-test your projects and improve them. STEP 5

PMI TALENT TRIANGLE Ways of Working

Challenge

Question: Why are projects difficult?



Turning ideas and resources into products and services, and we do this with:

- Incomplete information
- Biases
- Assumptions treated as facts
- Unknown factors

Question

When are all of the risks, unknowns, and variables in a project known?

At the end!

What can we do to know as much as we can, from the beginning through execution?

Great planning. Tested assumptions. Challenged positions.

In addition to great planning, we continually test our assumptions and challenge existing positions as new information comes in.

EXAMPLE

Space Shuttle Challenger

1986

January 28

Space Shuttle Challenger was lost 73 seconds after launch when an O-ring seal failed.

The Rogers Commission investigated. Among its recommendations to keep it from happening again:

1. Independent oversight of the booster joint redesign
2. An independent safety organization reporting to the NASA Administrator
3. Communication that gets safety concerns to the people making decisions
4. Formal review of critical risks, not repeated waivers

Challenge the Plan, Change the Outcome

Planning that pressure-tests its own assumptions, and requires dissent, produces measurably better outcomes than planning that doesn't.

UNCHALLENGED PLAN

- Assumptions go untested
- Dissent stays verbal, easy to override off the record
- Risk waived repeatedly until it's normalized

RESULT Catastrophic, preventable failure (Challenger, 1986; Bay of Pigs, 1961)

CHALLENGED PLAN

- Assumptions pressure-tested by an independent voice before launch
- Dissent is documented and must be answered
- Risk sign-off is formal, not assumed

RESULT Risks surface early enough to fix (Cuban Missile Crisis, 1962; NASA, 1987–2002)

The catch: challenge has to be maintained, not installed once. NASA's own process drifted back, and Columbia (2003) repeated Challenger's pattern 17 years later.

A LESSON FROM LEADERSHIP

Embrace the red.

A phrase from **Kurt DelBene**, former Chief Information Officer, U.S. Department of Veterans Affairs

PROJECT STATUS

- **Green** On track
- **Amber** At risk
- **Red** Off track

Red isn't failure. It's information.

1. **See it**
   Report the real status, not the one you hope for.
2. **Accept it**
   A red item isn't a mark against you. It's a problem you can now work on.
3. **Deal with it**
   The earlier red surfaces, the more options you have to fix it.

Hidden red becomes a surprise. Visible red becomes a plan.

STEP 1

Clear Your Mind and Stay Curious



Quiet the mind until the problem comes into focus, then meet it with questions rather than answers.

> *"Do you have the patience to wait till your mud settles and the water is clear?"*
>
> — Lao Tzu

> *"In the beginner's mind there are many possibilities, but in the expert's there are few."*
>
> — Shunryu Suzuki

Julia Galef, The Scout Mindset (2021)



Thesis: Good judgment depends less on intelligence or knowledge than on motivation. Galef contrasts two mindsets:

SOLDIER MINDSET

Motivated reasoning. Thinking is a defense: protect your beliefs, win the argument, and feel good.

Its rewards are comfort, self-esteem, morale, persuasiveness, image, and belonging.

SCOUT MINDSET

The drive to see things as they actually are, even when the truth is unwelcome.

A scout's job is to map the terrain accurately, not to defend a position.

The goal: see clearly, not be right.

A Short Story

What do you see?



STEP 1 · CLEAR YOUR MIND AND STAY CURIOUS

Step Back to See Clearly

You can’t clear your mind from inside the rush. These activities create the distance that perspective needs.

MOVE YOUR BODY



Take a walk
Leave the screen. Ideas loosen when you move.



Work out
A hard workout clears the noise and resets your focus.



Get outside
Open space and nature widen a narrow view.



Sleep on it
A rested mind catches what a tired one misses.

MOVE YOUR MIND



Breathe or meditate
A few quiet minutes before you decide.



Write it out
Worries on paper are easier to examine.



Explain it to someone
Saying it out loud exposes the gaps.



Zoom out
Will this matter in ten days? Ten months?

Your turn: which one works for you? On Zoom, drop it in the chat.

STEP 1

Clear Your Mind – Key Questions

STEP 1 OF 5

What is the reality, and how do you know?

Before you start, ask yourself:

01

What do I want to be true about this project?

02

Am I open to new and opposing ideas?

03

Am I defending a position, or mapping the terrain?

04

Where might bias be shaping how I see my own project?

STEP 2 · BEFORE WE START

Write One Thing



STEP 2 OF 5

1

Write it down

Write one thing you believe is true about your project.

2

Keep it short

One sentence: a date, a status, a risk, or a belief.

3

Hold that thought

Don’t judge it yet. We’ll come back to it.

IN THE ROOM paper or a notes app **ON ZOOM** a private note

STEP 2 · DOCUMENTATION

State the Facts



Review the facts you know for certain about your project.

Fact

Verified, sourced, and dated.

"The vendor contract was signed on March 3."

Ask: where did this come from?

Assumption

Believed to be true, but not yet confirmed.

"The vendor will deliver on time."

Ask: what if this is wrong?

Opinion

A judgment or a preference. Informed, but not evidence.

"This is the strongest team we've had."

Ask: what would back this up?

Bias

A hidden pull on how you read the other three.

"We're too far in to change course." (plan continuation bias)

Ask: what would change my mind?

STEP 2 · QUICK ROUND

Fact, Assumption, Opinion, or Bias?



STEP 2 OF 5

STATEMENT	WHAT IS IT?	HOW WOULD YOU CHECK?
The vendor will deliver on time.	ASSUMPTION	Ask for their delivery history and a dated plan.
The vendor contract was signed on March 3.	FACT	Check the signed contract.
The pilot results prove we made the right call.	BIAS	Confirmation bias. Seek evidence against it.
Testing will take three weeks.	ASSUMPTION	Compare against similar past projects.
Our team is the strongest we've had.	OPINION	What results or measures back it up?
The sponsor fully supports this project.	ASSUMPTION	When did they last say so, and how?

STEP 2 · YOUR TURN

Check What You Wrote



1

Reread it

Look again at the one thing you wrote down.

2

Trace it

Where did it come from? Who verified it, and when?

3

Label it honestly

Fact, assumption, opinion, or bias? Flag assumptions for Step 3.

How many facts? If not, how would you make it?

STEP 3 · TURN IT INTO A QUESTION

See the Unknown

STEP 3 OF 5

Be open to what you don't know. Every unknown is a question waiting to be asked.

1 · Stay open

Notice what you don't know yet.

Peak volume has never been tested.

“What haven’t we asked yet?”

2 · Ask it

Turn the unknown into a plain question.

“Can the new system handle our peak volume?”

“What would have to be true?”

3 · Sharpen it

Make it specific enough to challenge.

“What could make peak volume fail at go-live?”

“What would change the plan?”

The better the question, the better the challenge. In Step 4, your questions become prompts.

STEP 3

Ways to Find Your Questions

STEP 3 OF 5

Run a pre-mortem

Imagine the project has failed. Write down why. Then plan against those reasons.

“It’s month six and we’ve failed. What went wrong?”

Keep an assumption log

List what the plan depends on. Give each item an owner and a date to check it.

“What would have to be true for this to work?”

Invite an outside view

Ask someone with no stake in the plan, such as a peer PM, a tester, or an end user, what looks off.

“What would someone with no stake in this plan question?”

Look back at similar projects

Review lessons learned. Where did the surprises come from last time?

“What surprised us last time, and could it happen again?”

Write your questions down. They’re the raw material for your AI prompts.

The AI Box



AI is a counterpoint, not an oracle.

A low-stakes sandbox. Explore without fear, and with curiosity and surface threats before they become real.

1 **You bring the questions**
Your Step 2 facts and Step 3 questions, framed as prompts.

2 **It brings the pushback**
Ask what could go wrong, what you're assuming, and what you might be missing.

3 **You make the call**
Verify what it says. AI advises. The project manager decides.

STEP 4 · SET IT UP ONCE

Make Your AI Challenge by Default

STEP 4 OF 5

1 Find the setting

Claude, ChatGPT, Copilot, and Gemini all let you save standing instructions.

2 Paste your instructions

Tell it how to answer every time: answer first, then challenge, then tag confidence.

3 Test it

Ask about a plan you feel sure of. Does it push back?

EXAMPLE: THE CANDID ADVISOR

ANSWER	Lead with the direct answer. No flattery, no reflexive agreement.
CHALLENGE	Name my assumptions and the questions that expose my biggest gap.
CONFIDENCE	Tag claims Certain, Likely, or Guess. Never present a guess as fact.
STYLE	Concise and professional. No praise openers or filler.

Full instructions and steps for each tool are on page 2 of your handout.

STEP 4

Summarize vs. Challenge



SUMMARIZE-PROMPT

"Summarize the status of my project."

You get: a tidier version of what you already believe.

VS

CHALLENGE-PROMPT

"Here are our facts and assumptions. What could go wrong, and what would you push back on?"

You get: gaps, conflicts, and untested assumptions you can act on.

A summary confirms. A challenge tests.

STEP 4 · EXERCISE

Build a Counterpoint Prompt



1 Build the prompt

ROLE
Act as a skeptical, experienced project reviewer.

FACTS & ASSUMPTIONS
From Step 2: sorted and labeled.

QUESTIONS
From Step 3: the questions you formed.

2 Ask AI

Send the prompt.

Read what comes back: risks, gaps, and assumptions it questions.

3 Challenge

Push on what the AI gave you.

"Argue the other side."

"What are we still missing?"

"How do you know?"

4 Add to the plan

Keep what holds up.

Update risks, schedule, scope, or communication. That is Step 5.

↻ Repeat 2 and 3 with each new answer.

STEP 4 · EXERCISE

The Worked Scenario

STEP 4 OF 5

THE SCENARIO

Your organization is replacing a legacy scheduling system with a new cloud platform across 12 regional offices in 2 time zones. Go-live is in 10 weeks.

The sponsor says they are confident, and the vendor says the project is on track.

1 Build the prompt

ROLE

Act as a skeptical, experienced project reviewer.

FACTS & ASSUMPTIONS

From Step 2: sorted and labeled.

QUESTIONS

From Step 3: the questions you formed.

STEP 4 · EXERCISE

A Sample Prompt



ROLE from Step 4	Act as a skeptical, experienced project reviewer.
FACTS from Step 2	We are replacing a legacy scheduling system with a cloud platform across 12 regional offices in 2 time zones. Go-live is in 10 weeks.
ASSUMPTIONS from Step 2	The sponsor is confident, and the vendor says we are on track. Treat both as unverified.
QUESTION from Step 3	What evidence would show we are ready to go live, and do we have it?
ASK from Step 4	Push back on this plan. List the top risks, one line each, and what I should ask the vendor.

Facts and assumptions stay separate, so the AI can't treat confidence as evidence.

STEP 4 · EXERCISE

A Sample Output



STEP 4 OF 5

WHAT IT SAID

- Legacy data and integrations get tested too late.
- Time-zone and daylight-saving scheduling defects.
- Ten weeks is tight for testing, a cutover rehearsal, and fixes.
- Late training sends staff back to workarounds.
- No tested rollback plan or real go/no-go decision point.

ASK THE VENDOR

- Who sets and enforces the go/no-go criteria?
- Has a full cutover rehearsal been run with realistic data?

WHERE IT PUSHED BACK

"On track" may mean the vendor's work is on track, not that your offices are ready to run on the new system.

YOUR NEXT PUSH

"How would we know? Give me three go/no-go criteria we could test before week 8."

Condensed. Your AI's wording will differ. Treat it as leads to verify, not findings.

STEP 4

Use AI with Guardrails

STEP 4 OF 5



Verify

Check its claims against real sources before anything changes your plan.



Protect

Keep sensitive or confidential project data out of tools your organization hasn't approved.



Decide

AI advises. The project manager decides and stays accountable.



Keep asking

Ask follow-ups. Ask it to argue the opposite. Treat it as a conversation.

Use AI to sharpen your judgment, not replace it.

STEP 5

Update the Plan

STEP 5 OF 5

1

Sort the feedback

What is valid? What needs checking? What doesn't apply?

→

2

Decide what changes

Scope, schedule, budget, risks, or communication. Change at least one thing.

→

3

Record the challenge

Document the concern and your response, so dissent gets answered, not overridden.

The cycle isn't complete until the feedback changes something real.

Closing the loop is the whole point.

Keep the Cycle Turning

Run the cycle:

At kickoff

Before the plan hardens, test what it rests on.

At every milestone

Re-check the facts and the unknowns as they change.

When something surprises you

A surprise means an assumption failed. Run the cycle.

Great planning. Tested assumptions. Challenged positions.

WRAP-UP

Three Takeaways

1

Close the loop

Translate AI's pressure-test feedback into concrete updates to the project plan.

2

Prompt for a counterpoint

Use a specific technique for prompting AI as a sounding board, not an assistant that confirms what you already believe.

3

Take it back to your team

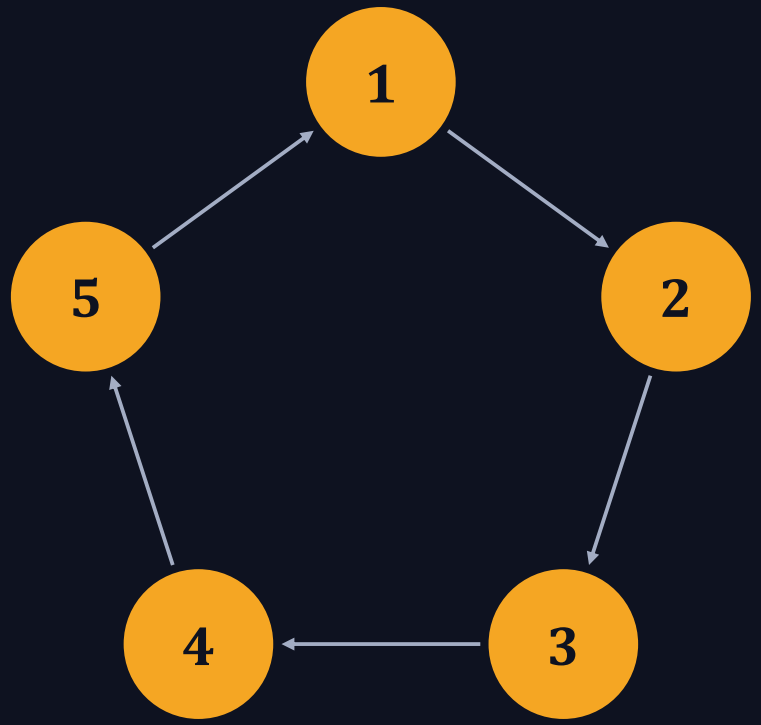
Use the one-page reference of the cycle.

Clear your mind. State the facts. See the unknown. Challenge with AI. Update the plan.

Thank you

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Questions and discussion



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Developed by Gary Thompson with the assistance of AI (Claude, Anthropic).

STEP 4

PMI's Guidance for Using AI

STEP 4 OF 5

Questions PMI recommends asking before you rely on AI:

01

What value will this AI use create?

02

What risks require addressing?

03

Where is human judgment required?

04

Who is accountable for decisions and outcomes?

05

How will monitoring and improvement occur?

06

How does this support organizational goals?

Source: PMI Blog, “AI Standard for Project Professionals” (pmi.org/blog/pmi-ai-standard-project-management)