



Practical Knowledge Management with AI Agents



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Why Knowledge Keeps Slipping Through the Cracks

- AEC firms don't have a knowledge problem.
- They have a knowledge flow problem.
- Critical project knowledge lives:
 - In inboxes
 - In heads
 - In one PM who's overloaded



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What We'll Do (and Not Do) Today

- This is not a tool demo or AI hype session
- This is about:

Practical use cases tied to PM work

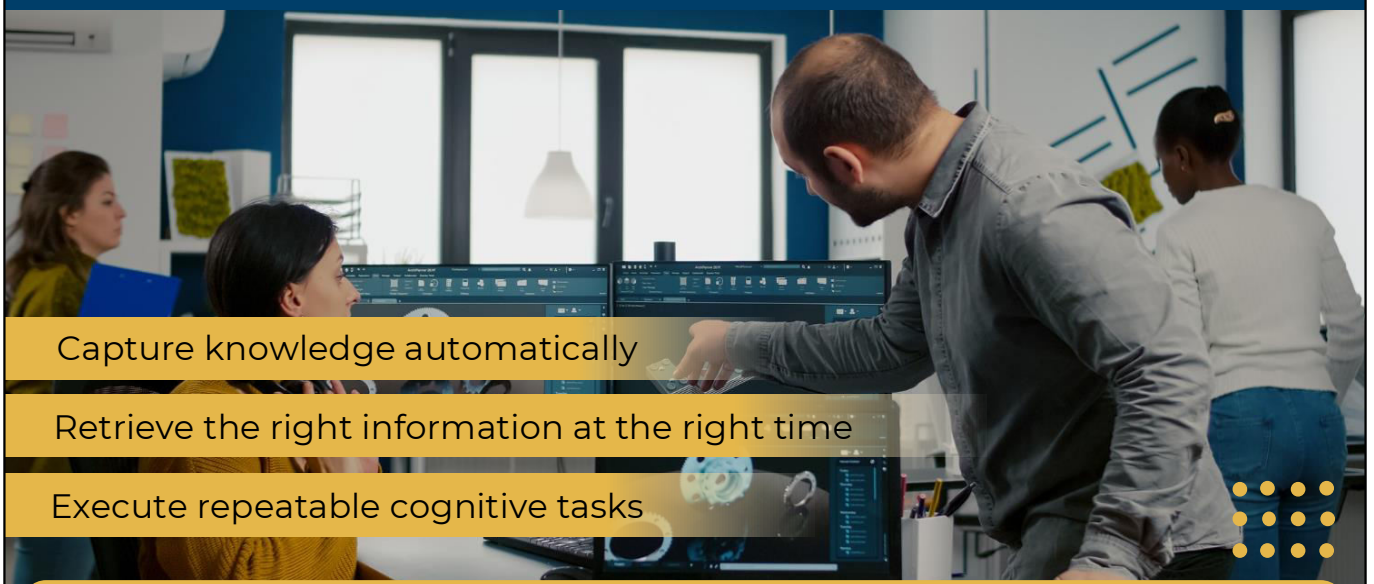
Adoption, not experimentation theater

Lightweight systems that fit high-utilization environments



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AI Agents: Practical Definition for PM Environments



Capture knowledge automatically

Retrieve the right information at the right time

Execute repeatable cognitive tasks



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“Which of these would save you the most time this month?”



The PM Knowledge Breakdown Map

Knowledge typically breaks down at:

- Project startup
- Transitions between phases
- Staff turnover
- Closeout



Group Exercise

(Small Groups of 4–5)

Identify:

One recurring PM task where knowledge is lost

The consequence (rework, delays, stress, errors)



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Start Where the Cognitive Load Is Highest

High-impact use cases usually involve:

- High frequency
- High friction
- Low creativity
- High risk if missed

PM-Focused Examples:

- Meeting notes → decisions → action tracking
- Lessons learned captured during delivery
- Finding “how we handled this before”
- Drafting consistent client communications



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The Adoption Trap

Most failures aren't technical:

- Too many tools at once
- No clear owner
- PMs asked to “do extra work”
- No visible benefit to billable work

“What new system did your firm roll out that quietly died?”



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How PMs Actually Adopt New Tech

Successful adoption requires:

- Embedded into existing workflows
- Output PMs already need
- Minimal behavior change
- Clear “what’s in it for me”



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Small Systems Beat Big Repositories

Effective knowledge systems:

Capture knowledge as a byproduct of work

Standardize just enough

Focus on retrieval, not storage

Examples:

- Auto-tagged meeting summaries
- Structured lessons learned prompts
- Decision logs tied to project phases



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Examples of AI-friendly Knowledge Capture



Teams Meeting (or similar)

Meeting Recordings with a Transcript



OneDrive (or similar)

Store Transcripts in Cloud

Level

Simple, Beginner

\$ Cost Included

What it does?

Starts a knowledge base to work from.



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Examples of AI-friendly Knowledge Capture



Viva Engage

Community Forums
(Lessons Learned or Q&A)



Microsoft Copilot

Automatically collects info
and uses as part of the
"brain"

Level

Intermediate

\$\$\$ *Tools Cost Money*

What it does?

Create a system of
knowledge sharing
that is AI-friendly.



If It Can't Be Found, It Doesn't Exist

Good retrieval systems:

- Use natural language search
- Are role-and phase-specific
- Surface answers, not documents

Example Questions PMs Ask:

- *"Have we dealt with this client issue before?"*
- *"What's our standard approach here?"*
- *"Who solved something similar?"*



Real World Example Agent

Name: Air-ielle - (ASHP Agent)

Description: None provided

Select your agent's model: GPT-4.1

Analytics: Conversation sessions: 0 (0%), Engagement: 0% (0%), Satisfaction score: --

Instructions: This agent is an assistant to the HVAC team. The goal of the agent is to understand the current resources available on Air Source Heat Pumps.

Knowledge:

- 236423.00.G5001 - Air Source Heat Pump Design Considerations_Rev1.docx (Ready)
- ASHP - Working Session Videos Transcripts (Ready)
- Air-Source Heat Pump (ASHP) - Main Folder (Ready)
- Air source Heat Pump Agent - Azure AI Search (Ready)

Web Search: Disabled

Meet Air-ielle: The Air Source Heat Pump Agent

Knowledge Sources:

- Company Files
- Guidelines
- Resources
- Calculations
- Transcripts from Project Interviews



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Sketch Your First AI Knowledge Agent

Small Group Exercise

Design a simple system:

- **Knowledge Source Files:** *What data does it consume?*
- **Trigger:** *When does it run?*
- **Output:** *What does it produce?*
- **User:** *Who uses it and when?*



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From Pilot to Practice

Choose your Route

Frontier Team

- Define a Select Team to be frontiersmen
- New tools First, "tried" methods second
- Evaluate performance, and efficiency.
- Compare against "traditional" teams output

Test Case Project

- Start with a specific project(s)
- Run in lieu of existing processes
- Do Deep Dive analysis, and share results

Select PMs

- Start with select frontier driven PMs
- Run alongside existing processes
- Measure time saved or errors avoided
- Share early wins publicly



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Your 30-Day Move

Individual Reflection:

Write down:

1

One use
case to test

2

One
stakeholder
to involve

3

One barrier
to plan for



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Final Takeaways

- AI agents support PM judgment—they don't replace it
- Start small, start practical
- Design for workflow, not novelty
- Knowledge flow is a delivery issue, not an IT issue

“What would change in your firm if PMs could find the right answer in 30 seconds?”



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QUESTIONS & DISCUSSION



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