



JUNE 2002
Volume 15
Number 6

PMI-OC
VISION

► We are recognized as the volunteer organization of innovative project management professionals. We provide value to our stakeholders and the community at large. We promote the development of project management as a benefit in all industries.

PMI-OC
MISSION

► We promote project management by providing services, tools and knowledge to project sponsors, project managers, team members and the community. We provide a forum for networking and opportunities for social interaction.



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JUNE 11TH DINNER MEETING

Developing a Project Management Office and Culture within a Highly Technical Company

*By Guy Morris, Microsoft Consulting Service
US Director for Project Management Office*

For organizations such as construction, aerospace engineering, or systems integrators, the delivery and implementation of complex solutions through repeatable methodology are not only important, but mission critical. However, for numerous other technological companies, the primary business model may be something other than execution of complex solutions within limited customer driven constraints. Within these situations, the most valued internal resources and functions are those that can either produce a competitive product advantage through technology or those who drive revenue. Project management may be poorly regarded or simply considered as a "necessary evil" rather than a strategic asset.

Building a Project Management Office (PMO) and a strong project management culture requires a clear focus on the business value proposition, executive sponsorship, organizational alignment, process implementation, building skill capabilities, and leveraging intellectual capital and systems. Coordination and communications with product development, sales and other key business functions is essential to building buy-in for when, where and how project management adds impact and value to the customer and the enterprise. Defining the appropriate operational accountability for policy, process, procedure and results is critical to avoiding a costly monolithic approach. The ability to implement quality assurance that enables best practice rather than becoming the "policy police" is challenging, but absolutely necessary to achieve a rapid ramp up and broad adoption.

The discussion will cover:

- Defining a business model specific value proposition
- Establishing program priorities and reach
- Understanding and changing business processes
- Bridging the skill-gap to build organization capability
- Leveraging intellectual capital, tools and systems
- Building credibility and community
- Improving the value of the customer experience

Guy Morris is the Microsoft Consulting Service US Director for Project Management Office. As a current member of Microsoft's global Project Management Office leadership team, he is deeply involved in global and US PMO strategies and implementation. Guy has over 23 years of broad business experience including selling and delivering global application and IT implementation projects, directing leading-edge e-commerce development, building and managing global compliance and assurance programs and directing operational strategic planning for Fortune 100 organizations such as Microsoft, Oracle Consulting, Occidental Petroleum and IBM. Mr. Morris has bachelor degrees in Economics and Finance, an MBA, and a certification in Database Management.

Vendor Showcase: Microsoft, see ad on page 14.

NEW PROJECT MANAGEMENT PROFESSIONALS

| | |
|----------------------|------------|
| Maheeb Awad | PMP-#48898 |
| Kim Carruth | PMP-#49041 |
| Anne Donahue | PMP-#49189 |
| Allan Elder | PMP-#49012 |
| Kirk Forney | PMP-#48757 |
| James Harris | PMP-#48669 |
| Carol Hiraoka | PMP-#47901 |
| David Huch | PMP-#49102 |
| Karin Lindae-Fregoso | PMP-#48760 |
| Kevin Merriman | PMP-#48386 |
| Julian Sabri | PMP-#48704 |
| Daniella Serven | PMP-#49005 |
| Lewis Siegler | PMP-#48996 |

New PMI-OC PMPs: 13
Total PMI-OC PMPs: 262

NEW MEMBERS

Nancy Abad
Trend Micro, Inc.

Mel Aclaro
Infogain Corp.

Distinct Consulting Group

Kevin Martin Brownley
Beech Street Corp.

Rebecca Caldera

DeVona Lynn Cole

Deanne Renee Compton

Sandra Cook
Automotive Club of Southern

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Sylvan Dean Finestone

Michael Ross Galea

Jill Hamada
Fluor Corp.

Norman Hill
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Computer Sciences Corporation

Joseph Hirsch-Schneider
Orange County Register

Roy Hollowell
Regional Project Director

William Randolp Howey
Gateway Business

Patrick Mallon
Los Angeles County Sheriffs

Warren Arnold Mackensen
Mackensen Associates

Continued on page 15

THE PRESIDENT'S COLUMN



As many of you have already heard, PMI Executive Director Virgil Carter, FAIA, will be leaving PMI in June 2002 for the Executive Director position at the American Society for Mechanical Engineers (ASME).

The PMI Board of Directors has developed a plan regarding the search for a new Executive Director at the Institute. Three new Board Committees were created in order to successfully define the criteria, create the processes and terms for identifying, interviewing and selecting a new Executive Director for the Institute. The new committees are the Initial Executive Search Committee, led by Jessy Magerl, PMP; the Final Executive Search Committee; and the Executive Director Contract Committee, both of which will be chaired by PMI Board of Directors Chairperson, Rebecca Winston, J.D. These committees will oversee the process for the search and will continue to communicate important information regarding the search to PMI membership.

Russell Reynolds Associates from Washington, D.C., USA has been retained by the Board of Directors to conduct the search for qualified candidates. Plans for the search include the following.

Beginning in June/July 2002, Russell Reynolds Associates will begin to advertise and accept all résumés for screening by the Initial Executive Search Committee. After the Initial Executive Search Committee has reviewed all résumés, they will develop a list of about four to five top candidates for face-to-face meetings and interviews.

In August, the Final Executive Search Process will begin. This process entails comprehensive background checks on the top candidates, as well as the conducting face-to-face interviews. After these interviews are complete, the Final Executive Search Committee will select the top two candidates for presentation to the PMI Board of Directors. Following this process, the Board will then interview the top candidates.

The final phase of the search process begins in September, which includes the Board decision between the top candidates. Shortly following this decision, a full announcement of the candidate, his/her background, and the start date of the new Executive Director will be made. A news release will be distributed to all pertinent media. This news release will be posted on the PMI Web site in the *Breaking News* portion of the site with a link to the news release and biographical information about the candidate.

The November issue of *PMI Today*® will feature an article announcing the new Executive Director and the start date.

Virgil Carter has led PMI through tremendous growth and has contributed greatly in getting project management recognized as a profession. His successor will have large shoes to fill. I am sure the PMI Board of Directors will do a fine job in selecting a successor to further the growth that PMI has enjoyed over the past decade.

Cyndi Snyder, PMP, MBA

Unlock the Secret to Successful Projects



You know that to complete a project successfully you need a good project plan. You must follow a schedule closely, communicate with your team and your stakeholders and have a proven risk management plan in place. But still, successful projects sometimes seem elusive.

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Nominating Committee Opens Search for Candidates

Do you see room for improvement in PMI-OC and want to help?

OR

Do you like what's going on now and want to get involved?

The Nominating Committee has opened its search for candidates for the 2003 Board. Officer positions include President, VP Corporate Relations, VP Communications, VP Finance, VP Membership, VP Operations, VP Professional Development, VP Programs and Trustee. Director positions are also available.

We will be evaluating all candidate recommendations and preparing a slate of candidates to stand for election in the fall. If you're interested, please contact **Janice Preston** jypreston@paccos.com, **Quentin Fleming** quentinf@msn.com or **Dave Jacob** dorend@prodigy.net by June 25.

Members in the News

PMNetwork (the professional magazine of the Project Management Institute) published an article by PMI-OC member **Jeffery Blanton, PMP** entitled "Mergers and Acquisitions: Successful Integration with Project Management" in the May 2002 issue.

Mike Beard, PMP, PMI-OC VP Corporate Relations spoke on the Program Management Office at the May 23 meeting of the Association of Information Technology Professionals (AITP) at the Ramada Inn in Culver City. For more information about the AITP organization, their web site is www.aitp-la.org.

Share your accomplishments with PMI-OC members. E-mail your information to Kristine_munson@hotmail.com.

VOLUNTEER OF THE MONTH

K.C. Anderson Honored as Volunteer of the Month

A resolution was unanimously passed, at the April board meeting of your chapter, designating **K.C. Anderson** as the *Volunteer of the Month for April*. Chapter President, **Cyndi Snyder**, honored K.C. at our May 2002 general meeting, by presenting her—in absentia—with a Certificate of Appreciation. K.C. accepted a position in the Bay Area. She has already moved to her new "digs" and regretfully could not attend the meeting.

K.C. joined PMI-OC a little over a year ago. Not letting the proverbial "grass grow under her feet," she became an instant and dedicated volunteer—even before her membership materials arrived from PMI headquarters. Her early venture into volunteerism was attending one of the chapter's bi-annual strategic planning sessions. Bitten by the "volunteer bug" by her attendance and participation at that event, she immediately became a chapter ambassador, which lasted throughout her stay with our chapter.

Her crowning achievement was the initiation of the PMI-OC Breakfast Roundtables. This initiative was prompted by K.C.'s recognition early on that some members might want to get together to discuss PM issues in a more casual and interactive setting. Breakfast Roundtables are now regularly scheduled for the fourth Tuesday of every month at the Hilton in Costa Mesa. Thanks to K.C.'s singular efforts, the Breakfast Roundtable is an unqualified success and has become institutionalized as an on-going monthly chapter event. If this isn't enough, K.C. is also on the board of the L.A. Chapter as Director of Special Projects.

K.C. is a Business Development Manager for ESI, a PMI Registered Education Provider and a large Project Management training/ consulting firm based in Arlington, VA. Before her departure we asked her about her feelings and thoughts:

"This Chapter has so much energy! I compliment the leadership for creating the dynamics that attract so many people. As I will be in San Francisco for at least a year, my aspirations will have to go on hold. I'd sure love to see Breakfast Roundtables start up in North and South County. Also, there is talk of expanding the ambassador program and I'd love to participate in that if I return."

Our best wishes and future career success to you, K.C. Our chapter will surely miss you!

Dave Jacob

VOLUNTEER OPPORTUNITIES

PMI Educational Foundation Volunteer Opportunities

The PMI Educational Foundation is currently seeking project managers and team members to direct and manage the projects described below. This position may require a considerable investment in time and talent by the volunteer.

Career Day Tools

The development of presentations, career day sessions, classroom projects, templates, tools, and "games" to assist project management practitioners in introducing the profession to elementary school, middle school, and high school students.

Education Enrichment Initiative

The development of a wide variety of proven and tested programs and materials for use by educators worldwide in grades 3-12 that will introduce, explain, and teach application of project management language, concepts, and tools.

Component Partnership

This project will help to raise awareness regarding the activities of the Foundation in global communities by introducing the Foundation to component members. It will also provide an opportunity to identify and recognize those people whom are potential leaders of their components.

To volunteer, contact: **Cliff Sprague, PMP**

Volunteer Coordinator, PMI Educational Foundation

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Ray Strano, PMP RCDD

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Patricia McNabb, PMP

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DISCOVERY HAPPENS!

The good news is that we learn something new every day. The bad news is that we learn something new every day. Such is the dilemma of the project manager who is working on a developmental project. Typically these projects move through requirements definition, specification development, design, product implementation, testing, acceptance, and delivery. If it were only so straightforward! The real problem is that at each step we learn more about what we are trying to do, and that can cause us to have to re-visit previous work. This is not a result of poor quality. Simply we learn as we go and sometimes it means what we did is now wrong. For example, we test what we built but it doesn't pass. Now we've "discovered" the design or implementation was flawed, but we didn't know, and couldn't have known at the time.

We might do better project planning and risk management if we had a tool that would help show where we might have to redo past work due to discovery. Such a tool is the Decision Support Matrix* (DSM). This surprising simple tool can help the project team in planning the network of activities to minimize rework due to discovery, and provide risk budgets to accommodate rework if needed.

The Decision Support Matrix is applied once we have the project activity network complete. Those activities where we obtain new knowledge are listed across and down the matrix in network sequence, first to last. For example, suppose the project is to plan the next PMI-OC monthly dinner. I've never done this, I leave that to our Board. But the planning steps, in order, might be Select Speaker, Review/Approve Topic, Budget Event, Estimate Attendance, Reserve Room, Select Menu, Advertise Speaker/Topic/Event, Count Registrations, Estimate Walk-ins. A Decision Support Matrix for these activities is shown in Figure 1.

Note the layout. Activities are listed across the top and down the left in the planned sequence. To complete the matrix we examine each activity to see if it provides any information to a later activity. If so we place an "X" in the column across from the activity that receives the information. This is completed in Figure 2 for the "Select Speaker" activity.

Once the speaker is selected we can plan the topic, budget including any transportation costs for the speaker, and advertise the dinner meeting.

Continuing through each of the listed activities produces Figure 3 Decision Support Matrix.

Knowing the topic will help us estimate how many people will attend and we can add the speaker's topic to our advertising effort. Our budget will influence the room we rent, the menu, and our advertising methods. After we estimate the attendance we have information for reserving the room and selecting the menu. However, since we have a limited budget, reserving the room can also influence the menu since the room might cost more or less than budgeted and then we can adjust the menu accordingly.

The Decision Support Matrix columns show information "provided" while the rows show information "needed." For example, "Budget Event" provides information for Reserve Room, Select Menu, and Advertising. Select Menu depends on information from Budget Event, Estimate Attendance, and Reserve Room.

The power of the Decision Support Matrix comes from determining if any events cause us to have to re-do previous activities. This is done by examining the rows above the activity being considered. Figure 4 on the next page shows this result.

This shows that when we "Review/Approve Topic" we may want to re-do "Select Speaker!" Similarly when we "Budget Event" we may realize we can't afford the speaker's costs. Although you may not agree with my analysis, the Decision Support Matrix shows what knowledge goes where (columns), and what activities are dependent on this knowledge (rows).

Repeating a previously completed activity is possible for every "X" above the shaded diagonal. The closer the "X" is to the diagonal the less the impact since fewer intermediate steps will need to be repeated. The farther the "X" is from the diagonal the greater impact as more intermediate steps will need to be repeated.

Continued on page 7

| OC DINNER PLANNING | Select Speaker | Review/Approve Topic | Budget Event | Estimate Attendance | Reserve Room | Select Menu | Advertise Speaker/Topic/Event | Count Registrations | Estimate Walk-ins |
|-------------------------------|----------------|----------------------|--------------|---------------------|--------------|-------------|-------------------------------|---------------------|-------------------|
| Select Speaker | | | | | | | | | |
| Review/Approve Topic | | | | | | | | | |
| Budget Event | | | | | | | | | |
| Estimate Attendance | | | | | | | | | |
| Reserve Room | | | | | | | | | |
| Select Menu | | | | | | | | | |
| Advertise Speaker/Topic/Event | | | | | | | | | |
| Count Registrations | | | | | | | | | |
| Estimate Walk-ins | | | | | | | | | |

Figure 1. Format of the Decision Support Matrix

| OC DINNER PLANNING | Select Speaker | Review/Approve Topic | Budget Event | Estimate Attendance | Reserve Room | Select Menu | Advertise Speaker/Topic/Event | Count Registrations | Estimate Walk-ins |
|-------------------------------|----------------|----------------------|--------------|---------------------|--------------|-------------|-------------------------------|---------------------|-------------------|
| Select Speaker | | | | | | | | | |
| Review/Approve Topic | X | | | | | | | | |
| Budget Event | X | | | | | | | | |
| Estimate Attendance | | | | | | | | | |
| Reserve Room | | | | | | | | | |
| Select Menu | | | | | | | | | |
| Advertise Speaker/Topic/Event | X | | | | | | | | |
| Count Registrations | | | | | | | | | |
| Estimate Walk-ins | | | | | | | | | |

Figure 2. Analysis of "Select Speaker" results

| OC DINNER PLANNING | Select Speaker | Review/Approve Topic | Budget Event | Estimate Attendance | Reserve Room | Select Menu | Advertise Speaker/Topic/Event | Count Registrations | Estimate Walk-ins |
|-------------------------------|----------------|----------------------|--------------|---------------------|--------------|-------------|-------------------------------|---------------------|-------------------|
| Select Speaker | | | | | | | | | |
| Review/Approve Topic | X | | | | | | | | |
| Budget Event | X | | | | | | | | |
| Estimate Attendance | | X | | | | | | | |
| Reserve Room | | | X | X | | | | | |
| Select Menu | | | X | X | X | | | | |
| Advertise Speaker/Topic/Event | X | X | X | | | | | | |
| Count Registrations | | | | | | | | | |
| Estimate Walk-ins | | | | | | | | | |

Figure 3. Analysis of activity results

| OC DINNER PLANNING | Select Speaker | Review/Approve Topic | Budget Event | Estimate Attendance | Reserve Room | Select Menu | Advertise Speaker/Topic/Event | Count Registrations | Estimate Walk-ins |
|-------------------------------|----------------|----------------------|--------------|---------------------|--------------|-------------|-------------------------------|---------------------|-------------------|
| Select Speaker | X | X | X | | | | | | |
| Review/Approve Topic | X | | X | | | | | | |
| Budget Event | X | | | | X | | | | |
| Estimate Attendance | | X | | | | X | X | X | X |
| Reserve Room | | | X | X | | | | | |
| Select Menu | | | X | X | X | | | | |
| Advertise Speaker/Topic/Event | X | X | X | | | | | | |
| Count Registrations | | | | | | | | | |
| Estimate Walk-ins | | | | | | | | | |

Figure 4. Completed Decision Support Matrix

The Decision Support Matrix is used in project planning to show us where discovery can cause us to repeat work and thus miss milestones and/or incur unplanned costs.

During planning we should try to rearrange the sequence of activities to reduce the number of "X"s above the diagonal or move the "X"s closer to the diagonal. Better yet, we can realize where discovery can occur and *plan* to revisit impact activities by creating events like "Revise Budget. Then the "X" that points *back* to "Budget Event" can now point *forward* to "Revise Budget" and we can plan to revise the budget if needed at that time.

The Decision Support Matrix tool can help your project team see where discovery can occur and cause them to have to revisit past efforts. Once the team knows that you realize they are learning as they go, and that sometimes a step backward is a step forward, they will be more open to tell you, "We just learned something and we have to re-visit last month's work."

Ray W. Stratton,
President, Management Technologies

**Modeling and Analyzing Cost, Schedule and Performance in Complex Systems Products Development, T.R. Browning, MIT*

Ray Stratton is a member of the Orange County PMI chapter and president of Management Technologies. He is currently a lead author of the PMI Practice Standard on Earned Value, and authored the Earned Value Management Maturity Model.® Ray is also a member of the "Projects@Work" editorial board. He can be reached at Ray.Stratton@mgmt-technologies.com.

RISK MANAGEMENT SYMPOSIUM

100 registrants and growing very fast. With registration opening in late March the SoCal Risk Management Symposium is off to a blazing start. And it will keep going so read on and then sign up early. For those of you that missed the early bird registration you still have a chance to register for only \$395, but that will only last until 14 June.

The people putting on this symposium are really great project managers. First time in my life that I saw a symposium or conference with a complete project charter, project plan, detailed WBS, project schedule, budgets, cash flow analysis, you name it they have it. What a great group of professional to work with.

Chuck Bolser, Chair of the Risk SIG is the Chair of the symposium and Mike Wakshull is the Project Manager. Behind them is a very energetic, pro-active team of professional from around the USA and Southern California. The Risk SIG has partnered with PMI-LA, PMI-OC, and PMI-SD to bring this event to Southern California. I see many more symposiums of this type in the future for these partners.

The symposium is 12-14 September 2002 at the Hyatt Regency in Long Beach, California. There are over 20 professional speakers from NASA, TRW, Disney Imagineering, Boeing, Flour, and many others. Robert M. Charette, Ph.D. and Brain Hagen, Ph.D. both gurus' of risk management will be speaking at the symposium.

Anyone attending this symposium is going to walk away thinking differently about performing risk management on a daily basis no matter what industry or field you are in. This symposium promises to provide one of the most in-depth, 3-day knowledge centered sessions on risk management from the most knowledgeable risk experts in the world.

PMPs will not only enhance their risk management knowledge but will also earn valuable PDUs. If you are interested in volunteering to help out the Risk Symposium Project Team contact us and we will get you going in the right direction. If you are a PMP and volunteer you will also earn PDUs for your volunteer time.

So there it is, this is going to be a fabulous symposium that I am not going to miss. I signed up early, I think I was number 2 or 3, to ensure myself a place. That was the confidence level I walked away with after first talking with the Core Project Team. I was not going to miss one of the best and the first one of its kind in Southern California.

Take the plunge! Sign up at www.risksig.com/socal/.

Mike Beard, PMP
VP Corporate Relations, PMI-OC

SCQAA Orange County Chapter

Based on numerous requests for a chapter meeting location in Orange County, the SCQAA LA Chapter is moving forward to help resurrect the SCQAA Orange County Chapter.

Brenda Ingham has volunteered to work with those interested in forming the NEW Orange County Chapter, and is seeking volunteers to work on forming a new Board of Directors, Committee Chairpersons or worker bees.

If you or someone you know would be interested in forming this Chapter and making it a successful part of the Orange County Quality community, please contact Brenda or Jim to get started.

Brenda Ingham, Brenda.Ingham@rcmt.com
Jim Stoumpos, Qualityone@usa.net

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I wanted to take a moment to thank you for the wonderful tool you have. I passed my PMP Exam with ease. Being able to emulate the test environment by using PMPPrepare was truly instrumental in my being very comfortable during the test. Your test questions challenged my understanding of the material, and ensured that my depth of understanding went well beyond just memorization. I highly recommend your tool to others in preparing for the test.

Ann Jacobs-Long Atlanta, Georgia

VISIT

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WHAT IS A SCOPE STATEMENT?

Probably the single most important controlling document of the project is the Scope Statement. It tells the project team how far they can and cannot go when planning. It tells the team what the customer bought and when it is expected to be delivered. It also includes reasons why the project was chosen, how much there is to spend, and how the team will know the project was a success!

“... But why does the team have to continue project planning after the Scope Statement is developed and approved? It sounds like it includes all the normal planning requirements for all the team's objectives...”

What it is, and is not!

The Scope Statement is *not* the final Project Plan (*PMBOK® Guide, 4.1.3 and 5.2.3*). The Scope Statement is the basis *for* planning. It is the spark that brings the team to understand exactly what the customer is expecting, when it is expected and how much there is to spend. It is not an excuse to justify more scope. It is the key to placing boundaries around scope.

How would one go about creating the project Scope Statement in a systematic way?

Justification will lead the team in conquering risks and objectives!

First, the team (especially the PM) should know why the project was selected and was the project a justifiable choice. For example: will this project make the company money? Will it place the company on the map in some sort of technical arena? If this project is a “low margin” undertaking, what are the future benefits? Is this project in line with what we do? Was there a demand for this deliverable?

Before a project is “authorized” to begin it is analyzed and certain risks are identified (*PMBOK® Guide, 5.1*). The team must discover facts regarding those risks (good and bad) *or the management of objectives will be difficult*. Project justification should be included in the Scope Statement and understood by the execution team.

Who wrote the proposal and who is our customer???

A meeting with the person who issued the project charter and gave the PM the authority to begin planning is a very good starting point for gathering information about the scope (*PMBOK® Guide, 5.1.3.1*). This person(s) will tell the PM two very important bits of information: who wrote the proposal and who is the customer. By understanding the sales relationship with the customer, the scope and justification become more clear to the team. This is also the point where the Product Description is probably released for evaluation and progressively elaborated (*PMBOK® Guide, 1.2.3*).

Product Description! What they want!

The most important input in writing the Scope Statement is the Product Description. This document is usually created and driven by the customer. It may include elaborate expectations or a simple statement of cursory requirements. Either way, it is the team's job to pick through this document and read every letter. It is also the team's responsibility to find holes, assumptions, missed information and vague definitions of quality expectations that may affect future planning as well as performance. When the team and the customer agree on the initial Product Description, it can be added to the Scope Statement.

The Product Description is also used to define the “boundaries” of the scope, which lead to the creation of project deliverables. The “deliverables list,” as many describe it, uses the Product Description to breakdown the project into “...*summary-level subproducts whose full and satisfactory delivery marks the completion of the project*...” (*PMBOK® Guide, 5.2.3*).

Developing the deliverables list may also be customer driven. This is the time to make sure the customer understands the “pieces” necessary to create the “Product Description.” They should understand what is—*not* included as well.

Objectives? Yes, objectives! Don't leave home without them?

The final element of the Scope Statement must be the Project Objectives. At this point, the team has studied the Product Description, understands the justifiable need for the project and has developed a list of major deliverables. Now it is time to agree on **Schedule**,

Cost and Performance boundaries. *These objectives are critical for the team to begin the planning process.*

The team will need a clear idea of how long this project is expected to take. Most project schedule expectations govern the need for extra resources or, possibly a shift in resources. The initial schedule also sets up cash flow plans and revenue recognition forecasts. Occasionally, the Scope Statement schedule is referred to as the “*Milestone Schedule or Chart*” (*PMBOK® Guide, 6.4.3.1*).

Cost estimates are necessary for several reasons. Although the final project budget is not determined at this phase, the initial estimate for deliverable costs set the stage for how much and how many resources will be needed to buy for, and implement the project. For example, a \$500k project in a \$12MM company will have a substantial impact on resources and their suppliers.

Quality and performance criteria are the final documents needed to start the planning process. One can spend money . . . one can build something . . . but does it really work? What does the customer want this project to do for them? How can the final “product of the project” be acceptable to the customer? Is it “Fit for use?” (*PMBOK® Guide, Chapter 8*). The acceptance criteria are established in the Scope Statement as part of the three main objectives.

Justification, Product Description, Deliverables and Objectives . . .

In summary . . . companies meet with clients and ask them for business. Companies want to make money and gain status. Smart companies are careful not to over extend their capabilities. Yet with every new project, they tend to stretch the Product Description to maximize the gain. The project is justified when both the internal and external customers agree on the Product Description **and** the risks. The Product Description helps the team to create a basic set of deliverables. After all, this is the tool used to create the clearest objectives possible: When, how much and what will make the customer happy!

By creating the Scope Statement, project teams are insuring their projects start out right and gain stakeholder buy-in. The Scope Statement is not to be taken lightly. No decisions should be made without consulting this document. The Scope Statement is a dynamic document that may change over time. It can also to help determine what changes can earn an extra few bucks from the customer. Take heed, project managers . . . Don't start, commit, agree or approve . . . without it!

Margaret Cunningham, PMP

MEMBERSHIP TREND CHARTS

Starting this month, we have improved the Membership and PMP Trend Charts included in *Milestones*. The old charts previously displayed information for the current year, which made seeing trends difficult with a few months of data. The new charts have been expanded to include 12 months of data so that you can see one year moving trends for membership and PMPs.

Glen Fujimoto, VP Membership



Collaboration with SIGs

Program Management Office (PMO) SIG Meeting

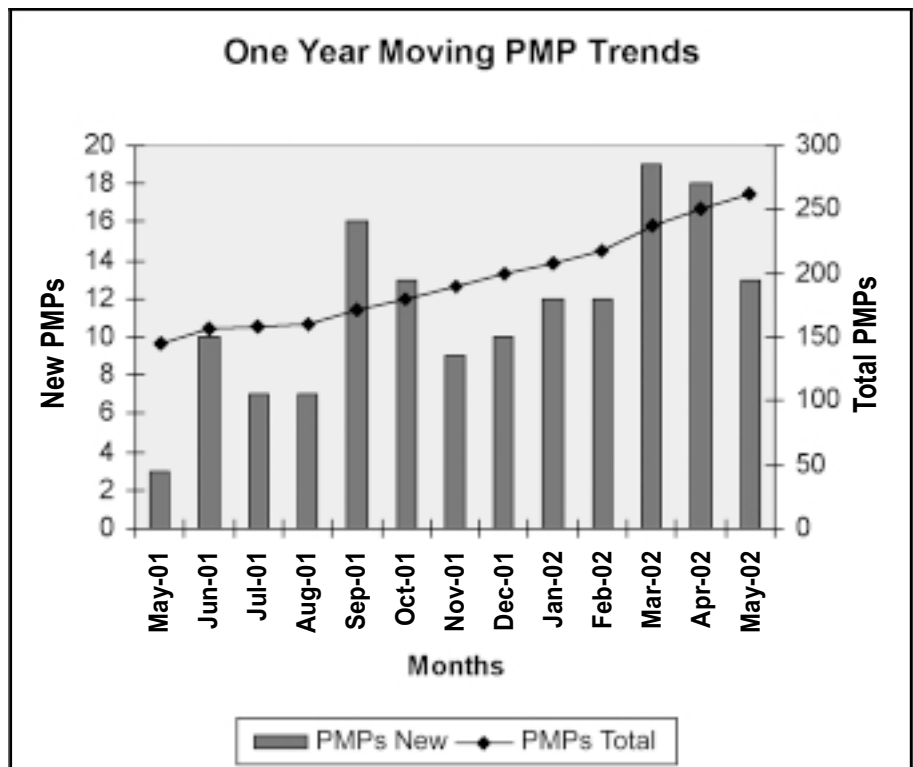
For those of you who are interested in discussing a PMO and potentially starting a PMO Regional Group (PMORG) in Southern California, we will be meeting at 5:30 prior to the PMI-OC Chapter meeting at the Wyndham Gardens Hotel. For further information contact Mike Beard at projectm@pacbell.net.

Women in Project Management (WiPM) SIG Meeting

For those of you who are interested in discussing WiPM in Southern California there will be meeting at 5:30 prior to the PMI-OC Chapter meeting at the Wyndham Gardens Hotel. If anyone would like to start this meeting off please contact Mike Beard at projectm@pacbell.net.

More SIG meetings to come.

Mike Beard
VP Corporate Relations
PMI-OC





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Register now for June SeminarsWorldSM Events. The first SeminarsWorld event in Cannes, France is scheduled for 17-18 June 2002. These seminars are linked with the fifth annual European Project Management Conference (PMI Europe 2002). Both take place at the Noga Hilton, with the conference held 19-20 June 2002. Also, join PMI again in Burlington Vermont, USA for seminars in Burlington held 11-14 June 2002. Please visit the PMI Web site at www.pmiseminars.org for more information. (rita.pagan@pmi.org)

The PMI Corporate Council would like to welcome its newest participant, Sun Microsystems. For the most up-to-date listing of Corporate Council participants, as well as links to their Web pages, please visit the Corporate Council Web page at www.pmi.org/corporatecouncil. (corporatecouncil@pmi.org)

Wanted: Proven, successful seminars that address topics of great interest to the project management community. Submit your proposals on or before 3 June 2003 and become part of *SeminarsWorldSM 2003*, the world's premier gathering of project management training and educational opportunities for project management practitioners. Thirty to forty seminars will be selected for presentation and offered in 21 locations in North America, Asia and Europe.

Please visit the PMI Web site (www.pmi.org/education) for a copy of the application or for more information. For applications filed for previous years, please contact Rita Pagan, Education Seminars Coordinator by e-mail to notify PMI that you are interested in reapplying for 2003 and to verify if your information is current. (rita.pagan@pmi.org)

Watch out for PMI e-Learning Connection's new offerings including *eSeminarsWorldsm*, "An Applied Framework for Project Management" and numerous other e-Forums. These courses offer learning opportunities in live and independent formats, ranging from multi-week to hour-long virtual seminars across a variety of disciplines. PDUs will be awarded upon course completion. Log on to www.pmi.org/education/elearning for more information. (john.roecker@pmi.org)

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Board Member Stephen Harrison represented PMI at the first International Conference on China Project Management held in Beijing, 24-26 April 2002. This highly significant conference was sponsored by the China State Economic and Trade Commission, the China Ministry of Personnel, The China State Administration for Foreign Expert Affairs, the Chinese Academy of Science, and the United Nations Industrial Development Organization. The purpose of the conference was to promote the adoption of systematic project management principles within all state-owned enterprises and to initiate the development of standards and certifications for China. Harrison spoke to approximately 800 attendees on the topic of "Evolution of a Global Profession" and PMI's support for its continued development. Denny Smith, PMI Manager, Certification; and Mike Price, PMI Senior Manager, Special Projects also attended the conference. For more information, please contact Mike Price at mike.price@pmi.org.

Try Your Knowledge on PMP Exam Questions

Answers are on page 15

Here is a sample of some questions:

1. Of the following, which is not a core planning process:
 - a. Procurement planning.
 - b. Scope planning.
 - c. Resource planning.
 - d. Activity sequencing
2. An example of a quality management policy that may need to be considered during project plan development is:
 - a. Standard quality provisions.
 - b. Quality assurance tools.
 - c. Quality assurance responsibilities
 - d. Quality improvement targets.
3. On a project the project team should recognize that:
 - a. Both low grade and low quality are problems that need attention.
 - b. Low grade is always a problem.
 - c. Low quality is always a problem, but low grade may not be a problem.
 - d. Quality and grade are synonymous terms on projects.
4. The tool and technique used in communications planning is:
 - a. Benefit/cost analysis
 - b. Benchmarking
 - c. Templates
 - d. Stakeholder analysis.

PMI REDESIGNS CONGRESSES

TO MATCH GROWING GLOBAL MEMBERSHIP

The Project Management Institute (PMI®), the world's leading not-for-profit professional association for project management, has announced that it is launching a major conference redesign to meet the needs of its increasingly global membership.

The new PMI conferences will build upon the strengths and best traditions of its well-respected Seminars & Symposium and have been tailored to meet the membership's growing demand for project management knowledge, professional development and networking on a global basis.

Recognized as the world's premier project management event, PMI's Annual Seminars & Symposium will now become a series of congresses held throughout the world, kicking off with PMI Congress – Europe 2003.

Later that year, PMI Congress – North America 2003 will continue the Institute's tradition of delivering quality professional development, knowledge and skills. Other congresses are being developed to meet the needs of key global stakeholders. All new PMI congresses will be in place by 2005.

PMI volunteers and members have been invaluable in the development of the congress model. The motivation for the redesign was based on PMI membership and PMI Symposium attendance. PMI has seen an increase in its global membership and now the congresses will work toward incorporating this growth into other areas proportionately. The volunteers will be responsible for selecting areas of topical focus, subject matter experts, and speaker selection recommendations.

The new congress process is more inclusive of all participants and has a broader focus than just industry related topics on project management. A variety of presentation formats to address a variety of learning styles will be offered, including papers, panel discussions, showcase presentations, case studies, group problem solving and more. This new format allows for broader and more interactive participation from all stakeholders.

Each new PMI congress will be delivered in a similar format that offers a Leadership Training Component, educational seminars, and a minimum two-day congress with professional development, networking and an awards presentation. However, each event will be tailored to reflect the cultural interests of its attendees.

PMI Congress–North America will continue to host the Annual Membership meeting.

A Congress Knowledge Advisory Group (CKAG) has been developed that will be the overarching advisory group for all PMI congresses. The CKAG will determine the areas of focus for all stakeholders through multiple communication paths. Other responsibilities of the CKAG include: creating a subject matter expert database, working with PMI to identify topics of interest, and responding to volunteer issues related to congress content. The CKAG is comprised of 5 volunteer members with staggered one to three year terms.

Working with the CKAG, is a Congress Project Action Team (CoPAT) of volunteers which has been created for each of the conclave to oversee geographic areas of focus that will help to ensure an appropriate cultural flavor and format, including content, knowledge experts and potential presenters.

The congress redesign aligns with and supports the PMI Ends Policies which state the need for new and improved programs, products and services; enhanced networking and professional development opportunities; and the promotion of the project management profession globally.

More benefits of the conference redesign include: leading-edge professional development; continued member-driven presentations; continued revenue to support PMI Member Benefits; the enhancement of PMI's leadership role within the project management profession; flexibility to respond to emerging issues; and the building of a greater identity globally.

Further information about the conference redesign and the enhanced benefits it provides are to follow. Please check the PMI Web site for more information.



PMI-ISSIG Presents “Adventures in Project Management”

The Project Management Institute's Information Systems Specific Interest Group (PMI-ISSIG) will hold its 6th annual Professional Development Symposium from **July 28th through July 30th, 2002.**

Where: Hilton Walt Disney World Resort
Lake Buena Vista, Florida



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- \$650 per participant prior to March 15, 2002
- \$775 per participant March 16 to June 14, 2002
- \$975 per participant June 15, 2002 and after

Register for the conference now at: www.pds02.org

Questions: Your inquiries regarding registration should be directed to Meetings Plus at 877-240-4200 (Toll Free) or email to Roxanne Hall at roxhall@aol.com.

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DINNER MEETING

TUESDAY, JUNE 11, 2002

Program: **Developing a Project Management Office
and Culture within a Highly Technical Company**

Location: Wyndham Gardens Hotel
3350 Avenue of the Arts, Costa Mesa
Behind the O. C. Performing Arts Center

Time: 5:30 - 9:00 p.m.

| | | |
|-------|---------------------|---------------------|
| Cost: | In Advance: | At the Door: |
| | Members \$30.00 | Members \$45.00 |
| | Non-Members \$35.00 | Non-Members \$45.00 |

Please register at www.pmi-oc.org. You can pay via credit card in advance or by cash/check at the door.

Make your reservation by 5:00 pm, Thursday, June 6th, to obtain the "In Advance" price. Reservations made after 5:00 pm, Thursday, June 6th, will be charged the "At the Door" price.

If you are unable to attend, please cancel your reservation at www.pmi-oc.org. Members and non-members who cancel after Sunday, June 9 at 6 p.m. will be invoiced a \$15 cancellation fee. Members and non-members who make reservations and do not show up at the meeting will be invoiced a \$15 no show fee.

PMI-OC BREAKFAST ROUNDTABLE

TUESDAY, JUNE 25

Join us for breakfast on the fourth Tuesday morning of every month to discuss project management issues that impact you.

Location: **Hilton Hotel**
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3050 Bristol Street (near Paularino)
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Time: 7:15–8:45 a.m.

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Register: e-mail Tom Sippl: tsippl@pacificlife.com

PMI-OC WEB SITE

Visit our web site at:
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to make your reservation for the dinner meeting and to stay informed of events that are important to members and to project management.

E-MAIL

If you would like to receive e-mail announcements about upcoming PMI-OC events, contact Rstein@PTSStaffing.com.

NEW MEMBERS *Continued from page 2*

Mahesh Mandavgane
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Judith Leona Obarr
IBM Global Services

Larry Douglas Prior
Compaq Computer Corp.

Vijayaraghavan Ramaswamy
Syncata

Bernadette Reid
Cerner Corp.

Answers to PMP Exam Questions

From page 12

1. a. Procurement planning

Core processes are those that have clear dependencies. Facilitating processes like procurement planning are more dependent on the nature of the project.

[Planning] *PMBOK Guide 2000*, pg. 33-34

2. d. Quality improvement targets.

Organizational policies, which are inputs to Project Plan Development, include quality management policies encompassing continuous improvement targets.

[Planning] *PMBOK Guide 2000*, pg. 43

3. c. Low quality is always a problem, but low grade may not be a problem.

"Grade" is a category or rank to items having the same functional use but different technical characteristics. For example, a software product may have high quality (bug free, user-friendly) and low grade (limited features) or vice versa, e.g. Low quality (poor overall performance) and high grade (many features). [Planning] *PMBOK Guide 2000*, pg. 96

4. d. Stakeholder analysis

Stakeholder analysis is the only tool and technique for communications planning.

[Planning] *PMBOK Guide 2000*, pg. 119.

PMI Orange County MILESTONES

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MILESTONES is published for the members of the Orange County Chapter of the Project Management Institute for the purpose of notifying members of meetings, Chapter activities, member accomplishments, and to provide information regarding project management in local business and government agencies. Advertising is welcome. However, its publication does not constitute endorsement by the Chapter or the Project Management Institute.

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COMING EVENTS

JUNE 11 DINNER MEETING

Developing a Project Management Office and Culture within a Highly Technical Company

Guy Morris

Vendor Showcase: Microsoft

See page 1

JUNE 24 BOARD MEETING

E-mail info@pmi-oc.org for time and location

JUNE 25 BREAKFAST ROUNDTABLE

See page 15

JULY 9 DINNER MEETING

Communication and the Project Team process: Lessons from the Zin Obelisk

Ted A. Leeman

Vendor Showcase: Management Concepts, Inc.

SEPTEMBER 7 PMI-OC PMP PREPARATION CLASS

See insert

SEPTEMBER 12-14 RISK MANAGEMENT SYMPOSIUM

See page 7



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