JULY 9TH PMI-OC PRESENTATION

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

By Mr. Ted A. Leemann, Executive Director, Management Concepts, Inc.

Most of us, hopefully, can remember being part of a project team that we thoroughly enjoyed. In this situation, you undoubtedly felt the team itself was worthwhile and rewarding and felt a sense of loyalty or personal commitment to the team and to the project. Typically, your productivity as a team member also was high in this situation. On the other hand, you probably also remember an experience in which your work on a project team was less than appealing, and you just wished the project would end or that you would be reassigned.

A project team, large or small, cannot exist without communication. It binds people to team membership and allows team members to fulfill the project team's purposes. Effective communication among team members then leads, in turn, to effective team decision making.

However, developing effective communication within a project team is not easy. There are no sure-fire principles, cardinal rules, or magic formulas. There are no models to follow in each and every situation. And, there are a number of misconceptions. How can we best promote cohesive and productive project teams?

You can't learn to swim without first getting wet, but also you cannot swim effectively if you just flounder in the water. The same is true on a project team. Anyone can be a member of a team and work on a project, but not everyone is a valued and effective contributor to the team's success. You must have both knowledge and understanding of communication and the team process. Timing also is critical to be able to know what behavior is most appropriate at what specific time during the team process.

Attend this interactive presentation so you can see how best to increase your effectiveness as a project team professional.

Mr. Leemann is a goal-oriented operating executive and consultant, well versed in project management skills gained through over 20 years of hands-on experience. His 20+ years of management experience in the public and private sectors with particular emphasis on project management, and strategic planning. He is a recognized expert in course development to include requirement determination, curricula design, and instructor course presentation skills.

Recent speaking engagements include an interview on United Airlines Sky Radio, Presentations at the Software Technology Conference, *Software Project Management: Solutions for Successfully Managing Risk, Complexity, Compatibility and Change*, as well as ASTD (American Society for Training and Development), *Project Management Disciplines for effective training*. Mr. Leemann has also authored a number of articles published Management Concepts, *Successful Project Management* newsletter, *Design/Build* Magazine and *Projects@Work* Magazine.

NEW! Regional PMO SIG for Southern California!

To find out more about the Regional PMO SIG and to begin participating, arrive early to the July dinner meeting. We will meet at 5:30 p.m. in the banquet room at one of the tables in the back of the room.

Look for the PMO SIG sign and Mike Beard.

Vendor Showcase: Management Concepts, See ad on page 8.

NEW PROJECT MANAGEMENT PROFESSIONALS

Donna Benzeval	PMP-#49982
Jeffrey Carter	PMP-#49974
Edward Curran	PMP-#49953
Lynn Drury	PMP-#50177
Glen Godbold	PMP-#49980
Leroy Lambright	PMP-#49371
Carol Markham	PMP-#49763
David Morgan	PMP-#37999
Mark Nguyen	PMP-#49927
Rodney Stevens	PMP-#49336
Declan Taaffe	PMP-#49774
Lynn Valenziano	PMP-#47040
Lewis Siegler	PMP-#48996

New PMI-OC PMPs: 12
Total PMI-OC PMPs: 268

NEW MEMBERS

Dima Ali
Nortel Networks

Nancy Belford
Seagate RSS

Larry Bob
Cognos

David Brenner
AMR Research

Karen Colby

Anthony Finefield

John Gerlach
Microsoft

Tarun Gupta
Syncata

Andre Hansen
A. Hansen Consulting, Inc.

Harry Hansen
Northwind Ventures, Inc.

Carol Harper

Eugene Herley

James Hollenbeck
End To End Computing, Inc.

Nita Jameson

Jesus Lopez
Lightbridge, Inc.

Melanie Marquez
Toyota Motor Sales USA

Zoriana Matviiv
Microgeneral Corp.

Ed Miranda
Peoplesoft, Inc.

Debashish Mittra
CAL2CAL Corp

Bernard Mondeau
BP-PSO

THE PRESIDENT'S COLUMN

The PMI-OC, Inc. Board of Directors is pleased to report that we continue to have a sound financial base as we go through the second half of 2002. Total assets were $69,933 of December 31, 2001, a 14.3 percent increase over 2000. We have no liabilities. Approximately $15,400 is held in certificates of deposit and in checking accounts.

For the year ended, December 31, 2001, revenues were $100,445, expenses $91,690 and net income $8,755. Revenues are generated from four sources: advertising, membership dues, programs and interest income. The largest source of revenue, $62,810, is from programs. This total includes the PMP Exam Workshop with $20,350, and dinner meetings with a total of $42,460.

A breakdown of income and expenses for PMI-OC is as follows:

The office of President does not directly generate revenue. Expenses include travel costs to the Assembly of Chapter Presidents meetings and to the PMI Seminar/ Symposium. Other costs include the Strategic Planning Meeting, monthly board meetings, and supplies. Total expenses for 2001 were $13,591.

VP Communications is responsible for the PMI-OC website, list server and the monthly *Milestones* newsletter. Revenue from advertising and the vendor corner was $5,644; expenses for printing and mailing and for maintaining the website were $20,675.

VP Corporate Relations oversees income from corporate sponsorships. PMI-OC received $400 in sponsorships last year. Expenses for the annual planning meeting and supplies totaled $248.

VP Finance maintains the book of record for the chapter. A small amount of interest revenue is generated each year for cash balances maintained in certificates of deposit. For 2001, total revenue was $2,361. Expenses included bank charges, insurance, PO Box rental, postage, and taxes. Total expenses for 2001 were $1,196.

VP Membership has is responsible for oversight of membership dues. PMI-OC received $27,325 in membership dues for 2001. Costs associated with maintaining the membership database totaled $5,021.

VP Operations generated a small amount of revenue from logoware sales. Total revenue was $1,905. Expenses totaled $8,665, which included officer elections, the annual planning meeting, supplies, and other general overhead costs.

VP Professional Development is responsible for our highly successful PMP Exam Workshop, which is the major fundraising effort of PMI-OC. Three workshops were offered, generating $20,350. Expenses to support the workshop totaled $7,124. These expenses included workbooks for the attendees, printing, refreshments, and instructor acknowledgements.

VP Programs handles the monthly dinner meetings. Our dinner meeting program revenue was $42,600. Expenses resulting from the dinner meetings totaled $35,195, and included hotel meal service, copies, supplies and speaker gifts. Our challenge, as in past years, continues to be coming up with an accurate projection of the number of attendees who will attend the dinner meeting for any given month.

The Trustee position does not generate any income and expenses are minimal. Total expenses for the year were $4.

For the year 2002, we have established a budget to guide our financial future. We projected an increase in revenues from membership dues, the PMP Workshop and in the dinner meeting programs, based upon prior year trends. We expect expenses to be generally in line with those of last year. As a result, we believe that PMI-OC will be just as financially sound in 2002 as we were in 2001.

Stephen June, PMP
VP Finance

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.

New Members Printing Correction

In the June 2002 edition of *Milestones*, some names were inadvertently omitted. The following are new PMI Orange County members who should have been listed last month. Our apologies for the omission.

Glen Fujimoto
VP Membership

Richard Bell
Distinct Consulting Group

Jeannette Sanderson

Michael Patrick Tatu
KPIT

Rick Taylor

Andre Torng

Grant Travland
ProBusiness

Paavo Truuvert
Automobile Club of Southern California

Neeraj Vijay
Newport Corp.

Eric Bruce Wilson

VOLUNTEER OF THE MONTH

Diana Goltzer, PMP Honored as Volunteer of the Month

A resolution was unanimously passed at the May board meeting of your chapter designating *Diana Goltzer* as the *Volunteer of the Month for May*. Chapter Volunteer Coordinator, *Brent Felsted*, honored Diana at our June 2002 general meeting by presenting her with a Certificate of Appreciation.

Diana joined PMI-OC a little over a year ago and immediately plowed into volunteering. In that short span of time, she accomplished, and is continuing to accomplish, a formidable array of activities on behalf of our chapter. Diana took on the job of soliciting advertising for the chapter website and newsletter. Advertising can be a significant revenue source for the chapter. However, in the past this effort was pretty much done on an ad hoc basis. Diana jumped in with both feet and organized it as an on-going chapter operation. She maintains and tracks advertiser contact information, including the logistical issues of scheduling ads and distributing information regarding input deadlines and advertising rate structures.

And if that's not enough, she also coordinates with the printing service and advertisers to ensure that ads are received in time for publication. Providing cradle to grave support in this endeavor, Diana follows up this effort to ensure our advertisers are satisfied with their published advertisement. She also handles the monthly invoicing and distributes a copy of all invoices to our VP Finance, **Stephen June**, and VP Communications, **Kristine Munson**. She follows up with both of them regarding payment status of submitted invoices and to resolve any accounts receivables issues.

AND THERE'S MORE! Some of you, who were at the June meeting, may have talked to representatives of Microsoft, the vendor that was showcased that evening. The fact that the chapter does bring in high quality vendors, like Microsoft, to present and discuss their products and services at each meeting is largely due to Diana's outstanding work in coordinating this segment of our meeting.

With all this volunteering going on, Diana still found time to study for and take PMP exam. She passed it last September and is now a full-fledged PMP. We wish her well in her career as a Project Manager in Information Technology

Dave Jacob

MICROSOFT LAUNCHES PROJECT 2002

On June 6th, Microsoft launched its new version of Microsoft Project 2002. The local Southern California District office held two launch events—one in Universal City and one in Irvine, totaling over 500 attendees. Project Managers, Business Decision Makers, and Technical Decision Makers attended to take the first, exciting look at the new version of Microsoft's leading project management software offering.

During the event, Microsoft presented the exciting new capabilities of Project 2002 Professional and Project Server–showing Enterprise Standardization, Enterprise Resource Management, What-if modeling and analysis and Team Collaboration, as well as the new ease of use functionality with SmartTags, Project Guides and Office integration. Microsoft also presented Share Point Portal Server highlighting the integration that the new Project Server platform can provide for Enterprise customers.

Specific to the Irvine event, the overall feeling was EXCITEMENT, and Microsoft definitely set the tone. The excitement was not only due to the great new features of Project 2002 and the cool prizes and freebies that Microsoft handed out to attendees, but also to peoples' quests to find a better way to manage the complexities and the projects that they are facing currently. It was great to see professionals at all levels in attendance who are new to Project Management and who are now realizing that they are involved in and have responsibilities specific to Project Management.

Chris Johnston commented, "I was very pleased with the enthusiasm around the Project Management profession as a whole. We had an incredible turnout for such minimally marketed event – it was the same turnout as we get for MS Office which is usually heavily marketed. I was approached by an attendee who said, based upon what she had heard and seen at Microsoft's launch event that morning, that their company was going to send a letter to rescind their recent purchase of a competing product. Also, seeing the turnout at the June 11 PMI Dinner Meeting was what really excited me." Microsoft realizes that such a strong response to these recent Project Management events demonstrates the need for such tools and the need for Microsoft and its competitors to better collaborate with businesses to bring Project Management solutions into their organizations.

The OC Chapters for PMI and MPUG (www.mpug-oc.org) showed their support by manning booths at the Irvine event. PMI's booth was represented by **Cyndi Snyder, Victoria Flanagan, Frank Parth, and Ed Walker** (all PMI members). "The event was awesome! I was really impressed with the number of people there. We were blown away that we ran out of all our handouts (at the PMI booth) before the event even finished. This was a great opportunity to collaborate with Microsoft on the Project 2002 release, and we are looking for more opportunities to collaborate with them in the future." said Cyndi Snyder. MPUG's booth was represented by T**om Sippl** and **Patricia Justice** (PMI members), and Bob Smith (MPUG board member). Tom Sippl commented that they collected approximately 90 business cards from people who were interested in the MS Project Users Group. Also, several people from San Diego and the Inland Empire inquired about MPUG chapters in their areas. (Hint, hint: opportunity for the PMI chapters in those locations!)

Supported by a network of professional partners and sponsors, the events were well attended with an enthusiastic audience that helped welcome and launch successfully, the new release of Microsoft Project. Partners and Sponsors that participated included:

For more information on Microsoft Project 2002, see their product home page at www.microsoft.com/office/project. For more information on the Microsoft Project Users Group, refer to the Orange County Chapter web site at www.mpug-oc.org.

Victoria Flanagan

WHAT CONSTITUTES
A SUCCESSFUL PROJECT?

As good project managers our immediate response to this question may be that a successful project must satisfy all requirements of the product, that the project was chartered to create, while executing it within the allocated budget and schedule. These three principal constraints are often manifested as an equilateral triangle whose legs are identified as (1) performance (or scope), (2) cost and (3) time. The equilateral triangle further symbolizes a balance among the constraints. In other words, any two constraints must be optimized to the third. The triangle further symbolizes that each constraint is intimately related to the other two. For example, scope changes will likely impact cost and time, and re-planning the remaining effort is needed to restore balance.

But is that all there is to project success? One may construe that satisfying the triple constraints may very well be a tactical achievement but not necessarily a strategic success. Let's look at a hypothetical project. What if you were chartered to develop a widget, including a pilot run that demonstrates its producibility and validates the prescribed unit target costs defined in the project charter? You complete the project by meeting or exceeding all product objectives while staying within cost and schedule constraints. The widget is now in full-scale production, but there is little or no interest in the customer community in procuring the widget. This scenario, albeit simplistic, can be characterized by the well-known saying, "the operation was a success, but the patient died." One may judge that, although the widget project was a tactical success, it was strategically flawed and should have never been initiated in the first place.

There is a "real world" infrastructure project that parallels the hypothetical widget project. It's the toll roads system built in Orange County over the last two decades. Some of you may recall a speaker on this topic at a PMI-OC dinner meeting several years ago. The project manager of the construction consortium that built the Eastern Transportation Corridor (highway 241) impressed us with how his team successfully completed the project nine months ahead of schedule and 20 percent under budget. By any criteria this project was both a tactical success–and arguably a strategic success for the construction consortium. But what about the project sponsor –the owners and operators of the toll roads? A month never goes by without an article in the local press about their financial difficulties. They are chronically unable to generate the revenue stream as originally projected to meet their operating costs and debt obligations. The utilization of the toll roads, over any one-week cycle, is an abysmal 5 to 20 percent of the available traffic capacity. Why are we Southern Californians eschewing these scenic, safe and "ergonomically-friendly" highways? Is it because the rates are too "pricey" or because (even if affordable for many) paying toll rubs against our Southern California cultural grain to drive on a freeway that's not "free"–or a combination of both? It would take a discussion much longer than this article to ascertain the underlying reasons. However, we can generally conclude that the toll roads (the product of the project) have not fulfilled the client's

expectations. It would seem to me that the strategic issues were not thought through sufficiently by the owners of the toll roads. Perhaps time will tell whether they will ever realize their original strategic goals. Based on this story, one may conclude that *strategic* issues, on just about any project, must take precedence over those within the triple constraints. Not only must the "operation" be successful, the "patient" must live.

If this last conclusion is true, it begs looking at the question another way. Can project success be achieved even though budgets are severely overrun and schedules extended? To answer this question in the affirmative, I am reminded of yet another major Southern California project. It's the movie "Titanic." James Cameron, the producer (think project manager) established a plan. He raised over $100 million and committed to release the movie in the early summer. Schedule was the overriding priority. An early summer release (high season in the movie industry) was considered essential to capture the anticipated revenue stream from the teen-age and young-adult market, the largest movie-going demographic sector; and to capitalize on the fact that "matinee idol" Leonardo DeCaprio was a prime box-office attraction for this market sector. Good strategic thinking!

Midway through production, Titanic ran out money, driven by Cameron's uncompromising quest for high quality computer-generated special effects, for which software tools were being developed in parallel with movie production–a high risk venture at best. With sheer persistence and tenacity, Cameron was able to raise almost a near equal amount of money. He achieved this in spite of the buzz on the "street," that the project surely would be scrubbed. Even with the new infusion of funds, the sacred summer-release deadline was no longer viable. The movie was finally released to the theaters in early December–six months late. The rest is history. Titanic, the movie as well after-market sales and rentals of home videos, was an unqualified success–a blockbuster in Hollywood parlance. The return on investment realized by all investors (old and new) was well beyond expectations. Moreover, Titanic was by far the largest Oscar winner and nominee that year including many awards from other film institutions. The movie industry and general press showered accolades on Cameron, equating him to other stalwarts, contemporary and past–Steven Spielberg, Ron Howard, George Lucas, Frank Capra, Alfred Hitchcock, Charlie Chaplin and others.

But is strategic success enough? Strangely, we haven't heard much about James Cameron in many a year. What happened to him? Curious about this, I inquired of several of my contacts in Hollywood business circles. Much to my surprise I found that many, who were members of the Titanic team, shun him. Buzz-words characterizing Cameron's style of leadership as "despotic," "tyrannical," "humiliating," "morale-killer" and others not fit to print were pervasive. On further inquiring about other feelings, words like

SOUTHERN CALIFORNIA RISK MANAGEMENT SYMPOSIUM

125 registrants at last count and it keeps growing, and growing, and growing. The SoCal Risk Management Symposium is going strong. This will be the project management event of the year and you can still register for the event at only $395 until July 15.

Chuck Bosler, Chair of the Risk SIG is committed to making this event one that will be talked about for a long time to come. The Risk SIG has partnered with PMI-LA, PMI-OC, and PMI-SD to bring this event to Southern California.

With the state of the economy today. how can a business survive without performing some type of risk management to prepare and win? This symposium promises to provide one of the most in-depth, three-day knowledge centered sessions on risk management from the most knowledgeable risk experts in the world.

Some of the key speakers at the event are:

Barry Boehm
TRW Professor of Software Engineering, Computer Science Department;
Director, USC Center for Software Engineering

Barry Boehm received his B.A. degree from Harvard in 1957, and his M.S. and Ph.D. degrees from UCLA in 1961 and 1964, all in mathematics. Between 1989 and 1992, he served within the U.S. Department of Defense (DoD) as Director of the DARPA Information Science and Technology Office, and as Director of the DDR&E Software and Computer Technology Office. He currently serves as Chair of the Air Force Scientific Advisory Board's Information Technology Panel, and Chair of the Board of Visitors for the CMU Software Engineering Institute.

Robert Charette
President, ITABHI Corporation

With 25 years of experience in a wide variety of software, systems and management positions, Dr. Robert N. Charette is an internationally acknowledged authority and pioneer in IT management and engineering, business and technical risk management, and the lean development & management of large-scale software-intensive systems. Dr. Charette is the President of the ITABHI Corporation, an international high technology company involved in information and telecommunications systems management consulting. Dr. Charette serves as a senior advisor to a wide variety of Global 100 companies, high tech consortiums, as well as government departments.

Brian Hagen
Managing Principal, Strategic Decisions Group

Brian Hagen, Managing Principal of SDG's value delivery practice, has extensive experience in strategy development, strategy implementation, program management, and business-process reengineering. Before joining SDG, Dr. Hagen directed strategic planning for Hughes Aircraft Company and established the Decision Focused Strategy Development Process–the corporation's risk management and new business investment productivity assessment process. He was also a member of the program management team, directing a $1 billion defense program deemed the most successful in US Air Force history.

A complete listing of speakers as well as other important information about the event is available at the event web site below. Join us September 12-14, 2002 at the Hyatt Regency in Long Beach, California. You just can't Risk not attending.

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

Mike Beard, PMP
VP Corporate Relations, PMI-OC
projectm@pacbell.net

Successful Project

"burn-out," "career-limiting" and, most importantly, "I'll never work for that–*expletive deleted*–again" kept cropping up.

This last story brings up another significant measure of project success that should *never, ever* be overlooked. I call this the "posterity" criterion. Organizations who ignore this success criterion–care and nurturing of their people–will lose valuable talent and will ultimately fail in future projects. On completing a project, team members (the internal stakeholders) must perceive a feeling of accomplishment; that they have increased their skills and knowledge without burnout; that they eagerly seek another challenging project; that they have a clear perception of their identity and worthiness to the organization; and that they receive praise and recognition for their contribution.

As we have seen, although meeting the triple constraints has its virtues, the overarching criteria are strategic success of the product as well as a revved up team that is eager to take on new challenges. In conclusion, I ask again,–"What constitutes a successful project? My short answer is: **A project is successful when *all* stakeholders are happy with the results.**

Dave Jacob

Dave Jacob is a project management consultant and principal of Doren Associates, Irvine, California. He is a past president of the Orange County chapter of PMI.

You may contact him at dorend@prodigy.net.

PMI-OC WEB SITE
Visit our web site at:
http://www.pmi-oc.org
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.

PROJECT FROM HELL

Back in Fall of 1998 I was working for a third-tier consulting company and I was asked by their San Francisco Branch to lead a Y2K project for a high-tech manufacturing company in the Bay Area. The project started next week and they were desperate for a project manager.

Despite the fact that I worked in another branch, the San Francisco office asked to borrow me to manage this project because they had nobody available who could do this. My own branch manager told me it was up to me to determine whether my schedule could support it. After some phone conversations with the SF manager on the schedule, the effort required, and the team size, I determined that this was a straightforward IT/LAN Y2K upgrade (although on a tight schedule) and I could spare the 11 weeks that the project was scheduled for. The only glitch was that I couldn't start the same week as the rest of the project team, I needed to start a week later to clean up some other work.

My first mistake was to agree to do the project just based on what the SF Branch Manager told me. Three days before I was scheduled to start I called the branch and asked them to fax me the Statement of Work and the contract for the project. There were a couple of things that were unclear from the conversations I'd had with the manager and I wanted to see what had been documented.

When I started reading the documents it was immediately obvious that the branch manager had just lied to me about the scope of the project. She had convinced the client that in 11 weeks, with five people, we could completely upgrade all of their systems as well as do a complete Y2K remediation effort. Since they had over 5000 desktop computers worldwide and no standard configuration it would have guaranteed failure to even try to do this within the scope of the project. They had also not bothered to keep with the current versions of much of their enterprise-level software, and most of the major applications they owned needed to be brought up to the latest revisions before any remediation efforts could be applied. I found out later the branch manager was also the salesperson for this contract.

My first task was to convince the client, the company's CIO, that what had been agreed to was completely unrealistic and not achievable. Ever try to convince a client that you can't do what your salesperson promised you could do? It's not a pleasant activity. But in this case his response surprised me. He said he knew it wasn't possible when the Branch Manager proposed it to him. He agreed to it because when we failed he could point out to his company that he'd hired the best he could and since we failed he obviously needed a significant increase in his budget to upgrade and maintain the IT system. So I was caught between an overly-aggressive salesperson who promised the world to the client and the client himself, who was looking to our failure to benefit himself.

I was able to convince the client that the application upgrades required before we started the Y2K work could be done much more efficiently by his own organization, since they were familiar with the system and we weren't. So we scoped down the project a little and signed a change order. Despite the slightly reduced scope of work most of the team still put in 70-80 hours work a week. Except for one team member who had been promised by the branch manager that he could take three weeks out of the middle of the project to return to India, and another team member who had told the branch manager that he couldn't work more than 40 hours a week due to his child care responsibilities. Neither piece of information was passed on to me by the branch manager.

This project was as big a struggle as I've had in my career. The salesperson/manager promised the client much more than could be delivered in order to make the sale, and the poor project manager (myself) who had to deliver an impossible project was going to be the one to take the blame when the project failed. I don't know how the project ended, because I was pulled back into my own branch after two months to recover a project that was failing locally. I found out a year later that the SF branch manager was finally fired because of ongoing problems like this.

What did I learn from this?

- Never trust anybody's word on what a project entails when there is written documentation available. We had a SOW and a signed contract that I should have read before I agreed to take the project.

- An experienced project manager should always go with a salesperson on a client call to make certain that what is promised can be delivered. If an impossible schedule is signed, when the project fails, the client is unhappy with the consulting company and the company is unhappy with your inability to deliver (regardless if it was possible).

- I showed poor judgment in accepting the assignment. I was swayed by the branch manager's pleas for help rather than insisting on determining if the effort was do-able.

If you have any of your own stories you'd like to share, send them to either Frank Parth, fparth@projectauditors.com, *or to Kristine Munson at* kristine_munson@hotmail.com. *All possible names, places, and associations will be removed from the stories and they will be published in confidence.*

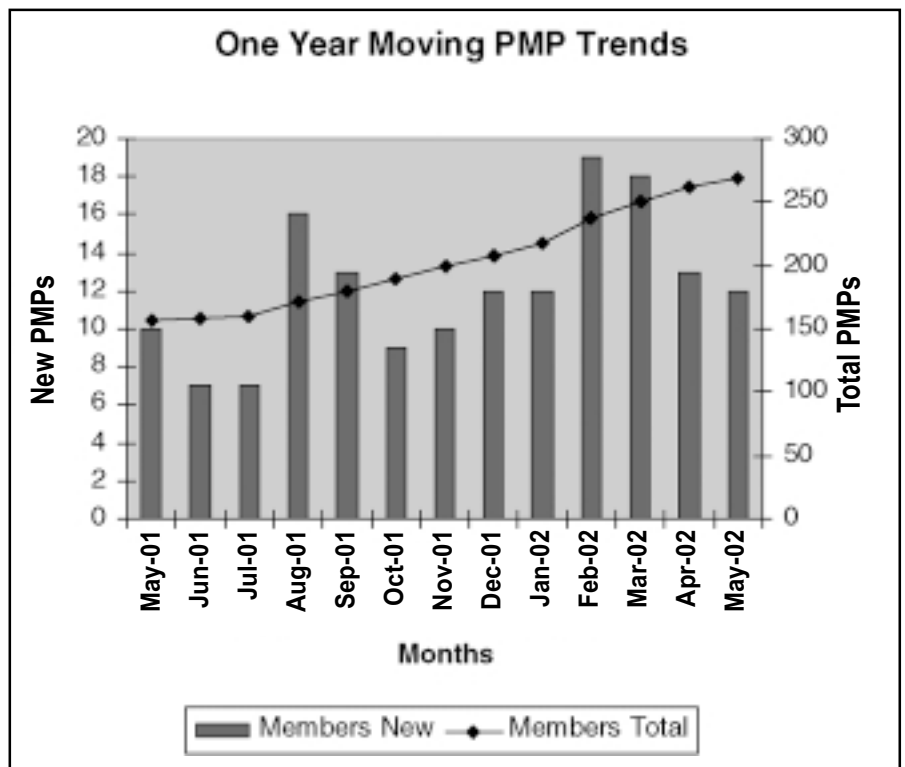## Update from the California Inland Empire Chapter

On June 18th, the California Inland Empire Chapter of the Project Management Institute held its first open membership meeting at the Courtyard by Marriott in Riverside, California. Our speaker was Mr. Henry Rogers, who has served in a variety of technical, supervisory and managerial positions in both the public and private sectors. The meeting was a great success and was a fabulous start for the new chapter.

Many have asked how to join the new chapter. Any PMI member wishing to transfer from a PMI chapter to a new PMI Potential Chapter can contact PMI at e-mail address chaptertransfer@pmi.org with their PMI ID# and the request to transfer. This will forward the request to the PMI Membership Department for processing. If a renewal is due within three months, then the member must use the renewal form and clearly mark the chapter they wish to join. Any PMI member who wishes to hold joint membership in their current chapter and the new California Inland Empire Chapter can contact PMI at (610) 356-4600 with their PMI ID# and ask to be a member of the California Inland Empire Chapter. No dues will be collected at that time.

If you have any questions about the new chapter, please email Michael P. Toothman, Vice-President of Membership, at toothman@deltanet.com.

Michael P. Toothman, PMP, MCP
Vice-President, Membership

MEMBERSHIP AND PMP TRENDS

One Year Moving Membership Trends

One Year Moving PMP Trends

PMO Reading List

Below is a preview copy of the PMO Certificate of Added Qualification (CAQ) study list.

- *The Project Office*
  by Thomas R. Block
  and J. Davidson Frame
- *The Strategic Project Office:
  A Guide to Improving Organizational
  Performance*
  by Kent Crawford
- *The Project Management Office Toolkit*
  by Jolyon E. Hallows
- *The Advanced Project Office:
  A Comprehensive Look at Function and
  Implementation*
  by Parvis F. Rad and Ginger Levin
- *Project Portfolio Management*
  by Dye and Pennypacker
- *Winning in Business with Enterprise
  Portfolio Management*
  by Dinsmore
- *Continuous Improvement Process
  Principles and Practices*
  by Mansir and Schacht
- *Implementation of Project Management*
  by Stuckenbuck

Board Appointments

At the June meeting of the PMI-OC Board of Directors, **Mike Beard**, VP Corporate Relations, volunteered to assume the position of VP Professional Development, which had been previously vacated by the Ed Fern's resignation from the Board. Subsequently, **Frank Parth** volunteered to assume the position of VP Corporate Relations. Both proposed changes were discussed and approved by the Board, and, in accordance with the Bylaws, President Cyndi Snyder duly appointed Mike and Frank to their new Board positions for the duration of the 2002 Board term.

Congratulations to Mike and Frank on their new appointments, and thank you to both of you for your continuing and increasing support of the chapter.

Members are reminded that the chapter is continually in need of volunteers to support chapter operations and that board positions are open to all members who wish to run for election. If you are interested in volunteering, please contact **Brent Felsted** at Flash10k@earthlink.net. If you wish to run for election to the board for the 2003 term, please contact the nominating committee. A call for candidates is contained in the June and July issues of *Milestones.*

Terry Warner
VP Operations

NEWS FROM PMI HEADQUARTERS

It's That Time of Year Again . . . Advance Registration Opens on 3 June for PMI's Annual Seminars & Symposium. Slated for 3-10 October in San Antonio, Texas, USA, this year's Symposium program has been shortened by a half day, thereby allowing PMI to reduce conference registration fees by $200.00 (US)! Attendees can expect the same high-quality professional development experience as in past years.

Watch your mail for a pre-Symposium mailer going out this month. Visit www.pmi.org/pmi2002 on or after 3 June for all the event details and to register. For questions, contact PMI's Registration/Housing Bureau after 3 June at 800-713-0774 (toll-free within the U.S. only) or +847-518-1593 (from all other locations). Or e-mail pmi2002@cteusa.com. (conventions@pmi.org)

PMI 2002 Keynote Speaker Seth Godin discussed breaking through the white noise of millions of Internet messages and beginning the one-to-one interaction necessary for successful Internet strategies when he addressed PMI '99 attendees in Philadelphia, Pennsylvania USA. Godin has been invited back this year to PMI 2002 in San Antonio, Texas USA, to bring to life the breakthrough concepts from his latest book, *Survival Is Not Enough.* Godin is a best-selling author, entrepreneur and speaker, who will address future trends, change and important issues for the project management profession. For more information about PMI 2002, or to register online, visit www.pmi.org/pmi2002. (conventions@pmi.org)

Hugh Woodward, PMP resigned from the PMI Board of Directors on 15 May 2002. Woodward has served on the PMI Board of Directors since 1997, most recently serving as Secretary-Treasurer for 2002, after fulfilling two consecutive terms as Chair of the Board. Woodward intends to remain active in the Institute. The PMI Board of Directors is scheduled to fill the Board vacancy created by Woodward's resignation at their June Board meeting. Until such time as the Board takes formal action at their June meeting, PMI Chair, Becky Winston, J.D. has appointed Louis J. Mercken, MBA, PMP to fulfill the role of interim Secretary-Treasurer. The Institute extends its sincere thanks to Woodward for his many contributions and years of service to the organization. (karen.alfonsi@pmi.org)

David L. Pells, PMP, PMI Fellow has been elected to the PMI Board of Directors. The PMI Board of Directors met in Brussels, Belgium with Assembly Representatives and members of the PMI management team to conduct its June 2002 meeting. At this meeting, the PMI Board of Directors elected David L. Pells, PMP, PMI Fellow, to fill Hugh Woodward, PMP's unexpired board director term through the remainder of 2002. Louis J. Mercken, MBA, PMP, was elected Secretary/Treasurer by the Board and will also serve as Chair of the Board's Performance Oversight Committee through the remainder of 2002. (karen.alfonsi@pmi.org)

PMI congratulates the following individuals on their selection for the PMI Leadership Institute Class of 2003: Roger Beatty, PMP; Cynthia Berg, PMP; Paul Bruno, PMP; Donna Detisch; El Sayed Mohamed El Baz, PMP; Donald Gardner, PMP; Joanne Gumaer, PMP; John Hacker; Jane Holum; Kathryn Perito; Pamela Robinson; Marilynne Rodgers, PMP; Karen Tate, PMP; Kathie Tennent, PMP; Fabio Pereira Teixeira de Melo, PMP; and Jeffrey Wells. Due in large part to corporate travel restrictions, PMI received only 18 applications for the Class of 2003, despite close to 8,000 queries related to the program.

SHARPENING
YOUR INQUIRY SKILLS

We all know that communication is a critical component of a project manager's job. Up to 90% of a project manager's time is spent communicating and a significant portion of that time should be spent gathering information from others. One way to gather information is through inquiry.

Most of the time we use an informal inquiry process, which is what happens over the course of a conversation when we ask questions. In conversations we typically switch back and forth between inquiry, asking questions, advocacy, and stating our ideas on a subject. "What do you think about the new PM methodology we're adopting?" (inquiry) "I think it's too complex." (advocacy)

Sometimes we need to use a more formal, structured process for gathering information from a person or from a group. An example would be when you are gathering customer requirements. Formal inquiry can also be used in conflict resolution, when you're trying to understand both sides of an issue. The Martin Training approach to formal inquiry is divided into four phases.

Phase 1. Preparation.

a. Prepare for the inquiry meeting. Define the outcomes you desire from the inquiry. What do you want to know? Prepare your inquiry questions. What questions will help your client provide you with the information you need? Next, determine how you will have the client analyze their responses. What tools will you use?

b. Choose a time and space. Choose a time and place that will minimize interruptions. Find a meeting room that will make the client feel comfortable and that provides enough wall space so that you can record the client's responses to the inquiry on banner paper. That will allow everyone to see what is being said. When you've finished your planning, send out the agenda.

c. At the meeting. Make sure all the participants have introduced themselves and then get consensus on the outcomes and the agenda. Review ground rules for the inquiry. Make modifications, as needed, based on group needs. Now you're ready to start.

Phase 2. Inquire.

There are four steps in the inquire phase and you'll cycle through these as you move from one question to the next.

a. Pose the question.

b. Listen carefully to the response. Do you understand what the person means? Check your understanding by probing for clarification. Check your assumptions with the other person. Do not challenge or disagree with what the person is telling you. This is an inquiry, not an inquisition. Your purpose is to understand the other person's point of view, not to debate it.

c. Record the response. It's best to record on self-stick notes (using a marker) and slap these onto banner paper. You want everyone involved in the process to be able to see the response. Do not edit the person's comments. If what they said is too long to fit on a self-stick note, ask them how you might abbreviate what they said. Make sure, however, that you don't lose the client's meaning; notes that are too short are prone to misinterpretation.

Phase 3. Analysis.

After you've gathered the client's responses, it's time to have THEM analyze them. In a requirements gathering process, you might ask the client to rate the requirements as *must haves, highly desirables and nice to haves.* You might ask them to rate the performance level required for each feature. You might have them rate each feature versus a competitive offering. (You may have your own analysis work to do on the results of the inquiry, such as defining resource requirements to provide the feature set, but do that after the inquiry process is over.)

Phase 4. Consensus.

After the client has completed the analysis, it's time to summarize and check for consensus. The client's responses and analyses should be clearly visible on the wall. Review what has been covered and ask if this represents their thinking. If it doesn't, go back and revise until they feel you've fully represented their point of view.

As a project leader you are in the business of communicating. Formal inquiry is one of the skills that every project leader will have a need for at one time or another. Have you sharpened your inquiry skills lately?

Paula K. Martin, CEO, Martin Training Associates
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Paula Martin is the CEO of Martin Training Associates, a management training and consulting firm. She's the author of seven books including the Project Management Memory Jogger™ *and* Executive Guide: The 7 Keys to Success. *For more information, visit the Martin Training website: www.martintraining.net.*

Job Postings Table

An additional benefit to attending the highly popular PMI-OC meetings has been included as of the May 14 meeting.

We now have a Job Postings table!

Any potential employer who has job opportunities for project managers may contact **Theresa Theiler** at tt1591@sbc.com.

Your job request will be compiled and listed in the database, and your request will be posted at the meeting.

There are only two requirements:

1. Send in your posting in the simple format that can be acquired by contacting Theresa.

2. So that the site will remain meaningful, let Theresa know when a job has been filled.

So that we know if our efforts are helping, if a job is filled by using this site, please let us know.

Good luck!

PMI. FALL 2002 PMP WORKSHOP

We are pleased to announce that the Orange County Chapter will hold a PMP® certification examination preparation workshop again this fall during September and October. This workshop is intended for members of PMI who wish to achieve their PMP certification, who have had a minimum of three years project management experience (see http://www.pmi.org/certification/) AND who have studied project management literature including the PMBOK® Guide. This workshop will help you prepare for exam success and meets PMI's new exam requirement for 35 contact hours in project management education. *(Only PMI members may attend. New members who have not yet received their membership number should include a copy of their PMI membership application when registering.)*

Site: UCI Extension Learning Center in Orange
200 S. Manchester (west of 1-5 on Chapman Ave.)
Second Floor

Schedule:
Six Saturdays from 8 AM till 5 PM.
September 7, 14, and 28 and October 5, 12, and 26

Fees:
The workshop fee is $500.00 per participant, payable at the time of registration. The class is expected to fill very fast, and cannot exceed 40 participants, so get your reservation and money in early to guarantee a seat.

Registration:
To register contact Adrienne Keane then make payment by check to the address below. *(Space will only be reserved upon receipt of fully paid registration fees.)*

If you have questions you may contact Adrienne Keane at keanepmp@socal.rr.com

Make payment payable to **PMI Orange County Chapter, Inc.** and mail to:

Adrienne Keane, PMP
18894 Deodar Street
Fountain Valley, CA 92708-7223

Please be sure to include the following information with your registration:

• Your full name, as you want it to appear on your Workshop Certificate of Completio
• Your mailing address, city, state, and zip code
• Your telephone number
• Your e-mail address
• Your PMI membership number

PMI. MONTHLY MEETINGS

DINNER MEETING

TUESDAY, JULY 9, 2002

Program: **Communication and the Project Team Process: Lessons from the Zin Obelisk**

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, JULY 23

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

Location: **Hilton Hotel**
(formerly The Red Lion)
3050 Bristol Street (near Paularino)
Costa Mesa
Atrium Cafe, lobby level

Time: 7:15–8.45 a.m.

Cost: Self-paid breakfast
Parking is validated

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

COMING EVENTS

JULY 9 DINNER MEETING
Communication and the Project Team process: Lessons from the Zin Obelisk
Ted A. Leeman
Vendor Showcase: Management Concepts, Inc.
See page 1

JULY 22 BOARD MEETING
E-mail **info@pmi-oc.org** for time and location

JULY 23 BREAKFAST ROUNDTABLE
See page 15

AUGUST 10 VENDOR SHOWCASE AND CONFERENCE
See insert and page 4

AUGUST 13 DINNER MEETING
Project Survival Tips and Characteristics of Successful Smoke Jumpers
Vicki Wong, Project Manager, IBM
Vendor Showcase: ProjectWorld

SEPTEMBER 7 PMI-OC PMP PREPARATION CLASS
See page 15

SEPTEMBER 12-14 RISK MANAGEMENT SYMPOSIUM
See page 7

Project Management Institute
Orange County Chapter, Inc.
P. O. Box 15743
Irvine, CA 92623-5743

RETURN SERVICE REQUESTED