DECEMBER 10TH PMI-OC PRESENTATION

Leading High Impact Teams

By Rachel Lewis

In this dynamic presentation, hear how Leaders and Coaches create High Impact Teams by making connections between business abilities, interdependent relationships and a compelling team vision. Gain an overview of the Top 10 High Impact Team Practices. Assess how your teams are performing by identifying their strengths and opportunities for improvement. Learn an effective model for decision making, building trust, and dealing with conflict.

Rachael Lewis, PCC, co-author of Leading High Impact Teams: The Coach Approach to Peak Performance (October 2001), brings over 14 years of business experience in the technology, retail, and hospitality industries managing geographically and culturally diverse teams. Her primary focus is on helping individuals and teams thrive in the workplace while producing breakthrough results.

Special for December 2002 Dinner Meeting. Please join us for our third year of providing joy to children during the Holiday Season. If you pay cash at the door, the PMI-OC dinner meeting cost will be $20 with donation of $10 or a $10 unwrapped toy for Toys for Tots. If you prepay via credit card, PMI-OC will donate $10 to Toys for Tots.

Vendor Showcase:
Innovative Management Solutions
See ad on page 5.

HAPPY HOLIDAYS FROM PMI-ORANGE COUNTY

THE PRESIDENT'S COLUMN

Thank You

In my last President's Column I want to reflect on things that I am thankful for over the past two years as the Orange County Chapter President.

I am thankful for the outgoing nature of the people in this chapter. I remember my first chapter meeting about four years ago when I walked into the Holiday Inn feeling pretty alone and lost. It wasn't but three minutes later that **Quentin Fleming** (at that point, the president) came up to me, started a conversation, hooked me up with a group of people and made me feel welcome.

Over the past four years I have had great conversations with hundreds of people at PMI-OC meetings. Such friendly and interesting people join PMI-OC. I love the networking time because there are so many interesting conversations going on. Anywhere you turn you can join in on something interesting from a problem someone is working on at their job, or a how certain software works, to "hey, I went sailing this weekend."

Some of these conversation turn into friendships. I have made so many wonderful friends through PMI-OC. I have met friends to go hiking with, shoot pool, do yoga, start a book club, start a business, drink beer, have great conversations, and so much more. The quality of the people at PMI-OC is top notch, and I feel so fortunate to have had the opportunity to develop rich relationships with so many of them.

I am always amazed by the number of people who are willing to volunteer their time to make our chapter better. Some of these people we can see at the dinner meetings cheerfully taking money, then there are some whose articles we can read in *Milestones*, or learn from as they teach the PMP Prep class. There are also so many volunteers behind the scenes, people who put together operations manuals, manage the website, take board meeting minutes, manage the membership database or manage the list server. These are people who have less visible roles, but make a huge difference in the having the chapter run smoothly.

And of course I am so very thankful for the opportunity to work with the Board of Directors of this chapter. What a fine group of people. All those who have ever served on the board have a huge selfless commitment to the chapter and the membership. To be a board member means to spend many hours every month organizing and managing a large area of responsibility. I get e-mails at 2 a.m., 3 a.m., 11 p.m., and anywhere in between from board members who are trying to balance work, family and PMI-OC responsibilities. What a passionate, competent, fabulous group of people.

I have learned so much in the past two years. I have developed leadership skills, delegation skills, conflict resolution skills, and confidence. I have learned to speak my mind even when I was scared, or knew that mine was not a popular position. I have had the opportunity to take responsibility for things that have happened in the chapter, good and bad, that maybe I had nothing to do with, but as president, I have been accountable.

I thank each of you for your participation and contribution to the chapter and to project management. And thank you for the opportunity to serve you as president the past two years. It has been an honor and a privilege.

Respectfully,
Cyndi Snyder, PMP

VOLUNTEER OF
THE MONTH

Dave Jacob Honored
as Volunteer of the Month

A resolution was unanimously passed at the October Board meeting of your Chapter, designating **Dave Jacob** as the Volunteer of the Month for November. Chapter Volunteer Coordinator **Brent Felsted** honored Dave at our November 2002 dinner meeting by presenting him with a Certificate of Appreciation.

Dave joined PMI-OC in 1995. He states that "after practicing program/project management for over 25 years I discovered the existence of PMI and the OC chapter through an accidental encounter with **Marty Wartenberg** in a UCI parking lot. I've known Marty for 30

Dave Jacob (left), November's Volunteer of the Month with VP Corporate Relations Frank Parth

years, and he was chapter president at that time." Dave recalls, "When I joined PMI-OC we averaged 25 people in attendance at dinner meetings, and our membership was under 200."

Dave has worked hard to help the chapter grow since 1995. His volunteer efforts have helped fulfill his personal mission statement that reads: "To internalize a feeling of accomplishment by sharing the hard-won wisdom I have acquired in my life; and as my legacy to embed that wisdom into as many critical thinking people as I can influence."

Dave served on the Board of Directors from 1996 to 2001 in three roles – VP Administration, President (two terms), and Trustee. Accomplishments during Dave's tenure as PMI-OC president include:

- Membership increased to over 600 persons
- Dinner attendance reached over 100 attendees
- Initiated the email list through Principal Technical Services announce PMI-OC events
- Establish the Chapter website

After leaving the Board, Dave did not rest on his past accomplishments. Instead he continues to be an active chapter volunteer. He is a regular *Milestones* contributor. He prepares the monthly PMP questions and answers. Dave also writes the Volunteer of the Month profiles. According to PMI-OC Advertising Director **Diana Goltzer**, Dave has "a gift to be able to describe other people's talents" and uses "language to capture qualities that may go unnoticed." Goltzer says, "Dave writes for the PMI-OC newsletter with such flair that the volunteer of the month being described is proud to be profiled. He is an eloquent writer who is a keen observer and makes us all aware of our own abilities. His praise is generous, but discerning."

Dave frequently submits *Milestones* articles on various project management topics that incorporate his personal experience and theoretical project management knowledge. Each article reflects his enthusiasm and passion for the project management profession.

This year Dave served as a member the of nominating committee with **Janice Preston** and **Quentin Fleming**.

Professionally Dave is active in project management course development and teaching at UCI and for other training organizations. He consults on the application of project management best practices. His clients include Honda USA, Computer Sciences Corporation, Mitsubishi of America and Pixar Animation Studios. He assists his clients with:

- Project management training
- Development of program/project offices
- Supporting the development and integration of project management information systems.
- Mentoring specific projects to apply training knowledge into hands-on planning and implementation.

Dave creates opportunities in his professional life to extol the value of PMI-OC membership. It is not uncommon to meet someone at a dinner meeting who is attending for the first time because Dave recommended they attend.

When asked why he volunteers for PMI-OC, Dave replies, "There are so many bright people I've gotten to know at PMI-OC, it spurs me on to use whatever modest talents I possess to help out. It's also a nice feeling to be appreciated while learning from exciting new experiences with my friends and colleagues in the chapter."

Kristine Hayes Munson, PMP
VP Communications

PMI-OC Members
in the News

PMI-OC member **Ed Fern**, **PMP**, will be a featured speaker at the 17th IPMA World Congress on Project Management "PROJECT-ORIENTED BUSINESS AND SOCIETY" to be held in Moscow, Russia on June 4 – 6, 2003. At the conference Ed will be announcing his new book about mass customization. The book is being co-authored with **Bill Postma**, **PMP**, PMI-OC member; **Vladimir Liberzon**, **PMP**, PMI-Moscow President; **Norman Wolfe**, **NPDP**, PDMA-SoCal Founder; and **Kevin McGourty**, **NPDP**, PDMA-SoCal President.

The November 2002 *PM Network* featured an article entitled "Effective Processes Require Support Beyond the PMO" by PMI-OC member **Mary Sunday**, **PMP**.

Share your accomplishments with us. E-mail kristine_munson@hotmail.com.

PRINCIPLES
OF PROJECT LEADERSHIP

Principles serve as guideposts or beacons that help you stay on course with your project. Let's review seven principles of project leadership.

Principle number 1: People own what they participate in creating. When team members work together to create a project plan and then monitor and control the project, they take ownership not only for their own work, but also for the project as a whole.

Some projects leaders fear losing control of the project if the team participates. Actually the opposite is true – the project is under more control because teams make better decisions and are more committed to carrying them out.

Principle number 2: People are inspired by what is meaningful to them. To make a project meaningful to the team, you need to connect the project to the strategic goals of the organization. When people on a team understand the project – why it's being done, what they are supposed to do, how what they do affects others and fits into the whole picture, they are more effective as individuals and more effective as a team.

Principle number 3: Team members who understand how the parts of a project fit together are more committed to making the project successful. It's important for everyone to understand the interdependencies in the project and to see how their pieces are essential to getting the whole project completed successfully. Create the schedule on banner paper with sticky notes with the team. That way they'll understand how their pieces fit into the big picture.

Principle number 4: Team buy-in is increased if team members work from shared information. Use visual, team-based tools to guide the project management process so that everyone sees the same information presented. Record ideas and decisions on flipchart paper. Use sticky notes for recording ideas. Team-based tools provide a structured way for everyone on the team to contribute and to reach consensus on a decision or solution.

Principle number 5: Show your appreciation for the contributions of each individual on the team and for the team as a whole. People are more motivated to perform when they feel valued. When teams are valued, they also perform better. Not everyone on a team will feel valued in the same way. However, there are some standard ways in which to value people and teams.

Take time at each team meeting to recognize accomplishments and thank people for their contributions. Periodically solicit their feedback on how you can improve. In addition, when significant accomplishments are achieved, take time for a small celebration.

As important as recognition and celebration are, it's equally important for the team to feel you're on their side and if they take a risk that you'll support them. If you want a motivated team, remove obstacles and provide a shield that minimizes outside interference.

Principle number 6: To build a team you must build and maintain an environment of mutual trust and respect. Trust takes time to build. Tips for building trust include:

- Honor diversity of thinking, learning and other individual differences
- Don't make promises you can't keep
- Keep your commitments
- Maintain confidences
- Value each person's inputs and ideas
- Be honest
- Use good people skills
- Use good facilitation skills
- Eliminate blame

Although trust is built slowly, it can be destroyed in an instant, and when it has been destroyed, rebuilding trust takes a very long time.

Principle number 7: Empower the team. Try these tips for empowering the team:

- Have the team create the project plan
- Maintain team ownership during execution
- Create clear accountability and then don't micromanage
- Set up an oversight process so you have early warning signs if the project is off track
- Make sure people have the resources/cooperation they need to get the job done
- Make sure people have the skills to do the work assigned

Try applying these seven basic principles and see if they don't make you a more effective leader.

Paula K. Martin
CEO, Martin Training Associates

Paula Martin is the CEO of Martin Training Associates, a management training and consulting firm. For more information, visit the Martin Training website: www.martintraining.net *or our new Executive website:* www.mtaexec.com*. Phone: 866-922-3122 or 513-563-3512. Copyright 2002, Paula K. Martin, All Rights Reserved.*

NOVEMBER DINNER MEETING REVIEW

Awareness of Company Culture, Focus on Corporate Business Objectives, and Management Buy-In
THE KEYS TO SUCCESSFUL PMOs

Battle scarred as they are, **Adrienne Keane**, **Bob Johnston**, and **Stan Van Bibber** couldn't have done better with their straight-from-the-trenches account of what it takes to start a PMO and to make it work. During the November dinner meeting panel discussion moderated competently by **Bill Postma**, they shared the Dos and Don'ts with their audience. Here they are:

Postma: *Given that the* PMBOK® Guide *does not yet address how to implant and manage multiple simultaneous projects, what is the methodology for elevating the Project Management Office (PMO) to the enterprise level? What are the conditions in a company that would favor a PMO?*

Keane: A good example is my experience with the IT department of a manufacturing and sales organization that had been organized functionally for many years. Projects came and went, obtaining support from wherever available. Their outcome was often difficult to coordinate and predict. Here it made sense to task a functional unit with the creation of a PMO such that it can manage initiatives and change effectively.

Because this functional unit was an actual business unit, it was capable of managing these initiatives as corporate objectives, rather than merely as IT issues. It did so by answering: How is a new initiative to support the business objective of the corporation? In other words, it gave guidance to how to do the right things, and how to do things right. Henceforth, all initiatives (IT and other) were managed as projects. Even the very establishing of the PMO was treated as a project.

Consider this analogy: You want to go for a trip and visit the Auto Club to ask for maps. Not only do you receive the desired trip planning assistance (doing the right things), but the Auto Club also offers you roadside assistance (doing things right).

Van Bibber: There are telltale signs when you need a PMO. Signs such as the majority of projects are over budget or behind schedule. Or what I would call the "white knight" syndrome. The white knight is usually an experienced project manager who is sent into action with the mission to rescue a troubled project and to bring it home.

Such ad-hoc replacement of an existing project manager reveals an underlying disparity in the project management skill set among the project managers in an organization. The first thing a PMO has to do is thus to close this gap in skills between the white knight and the also-rans. It can achieve that by taking on the role of a project governance office.

Keane: The PMO brings economy of scale, because with its procedures it establishes extra control and uniformity in project execution. Especially in a company of global reach, the PMO creates consistency in the deliverables and standardizes how the enterprise delivers its services worldwide. For example, documents delivered to customers everywhere have the same look and feel.

The PMO becomes thus the center of excellence for managing projects, whereby:

1. Project managers adopt and adhere to standard methods of excellence;
2. Project managers use a common language throughout the enterprise;
3. Outcomes of the projects become predictable.

Johnston: There is a crucial difference between the role of a project support office and a PMO, because the PMO operates at a higher corporate level. Clearly, to do so effectively, the PMO needs executive management buy-in.

The PMO Panel at the November Dinner Meeting

Postma: *What are the benefits of a PMO?*

Keane:

1. A PMO is highly effective in an environment with many on-again/off-again projects and frequently changing requirements.
2. The improved resource utilization brings a smoother transition of resources from one project to another, especially for projects that end in one geographical area and start up in another. It also brings fewer understaffed projects.
3. The constancy in the delivery process for products and services leads to better quality and results that are more predictable. An example is the identical quality in the same deliverables worldwide.

Johnston: It takes about 18 months for the benefits of a PMO to become manifest. It is not an overnight process. To this end, the PMO must drive the entire project management process, from initiating the project to serving the customer. It does not come in only after the fact.

Van Bibber: When you ask senior management about the benefits they reap from their PMO, they frequently do not have an answer because they are not aware of the everyday competition for resources among the projects around the enterprise and the chaos that often ensues. As an example, consider the difference between a patient visiting a doctor's office and a patient being admitted to an ER (hospital emergency room).

In the doctor's office, the patient signs in, waits, gets called, meets the physician, describes the situation, obtains advice and treatment, and leaves. In the ER, the patient arrives usually unannounced, often unable to communicate, and in severe distress. What to the uninitiated eye seems like utter chaos is really the efficient allocation of crucial resources paired with rapid execution of well-defined procedures by highly trained professionals who have only one objective: to save the patient's life, and fast. In the ER, the activities are response-driven; in the doctor's office plan-driven.

A PMO can bring similar benefits to a company. Instead of leaving project managers to fighting fires and managing by crisis, a PMO brings them operational structure, procedural discipline and professional training. The project managers can then execute their projects effectively, predictably and methodically. By performing either plan-driven or response-driven activities, they can avoid total chaos and frustration.

Postma: *What are the challenges of starting a PMO?*

Johnston: Senior executive buy-in is often a challenge to obtain. Management deems it a difficult decision. Yet, you need management's willingness to continue investing into the PMO, even while not seeing any immediate benefits.

Van Bibber:

1. A company's culture can make or break a PMO—tune its display of authority to the culture.

2. It is likely that some people will resist change—plan for it as you set up the PMO.
3. Politics—over time any organization will develop workarounds to overcome procedural obstacles. These people are often unwilling to give up their ways of doing things, especially if these ways have worked well for them.
4. White knights—they are usually among the more experienced project managers in the organization. They often have egos. Bring them into the PMO early on.

Keane: For the best proof of a PMO's usefulness,

1. Do projects where you have quick wins in an area that has high impact.
2. Do not underestimate the involvement of key people in the process of building the PMO. Otherwise, these people will likely reject the whole idea for not being theirs.
3. Ask: What do you do first? Where is the most pain? What can the PMO do to help?
4. Resist the temptation for jumping to use tools first, just because they are sexy.
5. Handle and manage the expectation of senior management. Because the setting up of a PMO can take up to three years, it is important that management recognizes this time frame and stays with it for the duration.

Postma: *What lessons have you learned in starting and running a PMO?*

Van Bibber: Treat the PMO like a project. Obtain a charter, allocate the resources, define the scope, and above all, seek authority commensurate with your responsibility.

This authority is crucial. You need it to get the project managers to follow a standardized methodology. Recognize that the PMO is a business function. Do not place it in the IT organization, because then it will handle only IT projects and not also all the other projects that make good business sense. Keep in mind the overall value that the PMO adds to the enterprise.

Keane: Keep articulating the value that the PMO adds. Have a good elevator pitch. Have ready answers to: How does the PMO contribute to the corporation?

Use KISS: keep it simple and straightforward. Add value quickly. Do not build a big behemoth. Rally your forces around those efforts for which, one or two years down the road, you can show how they have contributed real value.

Johnston: Clear and quick communication is key. Ask: What language should you be using to communicate? Avoid project "managementese." Instead, use numbers and charts that speak to executives.

As you build the PMO, you need to develop the language and foster the culture for communicating the PMO's message. Use your small wins to develop a marketing message to your organization. Continuously capture this message and communicate it to the rest of the world.

Postma: *Why is it worth it to build a PMO?*

Keane: It's important to understand the business case. You need to demonstrate how the PMO will impact the bottom line positively.

Johnston: The answer depends also on the business issue that the organization is grappling with, for there is a direct link between the business case or business initiative, and the PMO's value contribution. The PMO is worth it, if you are able to make this connection.

Van Bibber: For the PMO to be worth it, you must ensure that the organization is willing to support it. PMO work is very satisfying, as is watching the PMO development grow. The PMO "architect" enjoys mentoring any person who starts out with a new project, explaining the role of project sponsors, how to work with sponsors, and how to control changes in project scope. The PMO is worth it, if you can make just one person in the organization become an effective project manager. Raising a person's skills lifts the skill set of the entire organization.

Postma: *What function, or value, does the PMO serve in your organization?*

Johnston: It gathers the project management capabilities and makes them grow into an enterprise-wide PMO that focuses on:

1. Education
2. Direct management of projects
3. Requirements gathering
4. Mentoring and training
5. Improving methodologies for serving clients

Van Bibber: A rising tide lifts all ships.

Keane: The PMO initiates projects that support the corporate strategy. It manages the resources around these projects, and it gives senior management the necessary visibility for knowing what is going on in the projects.

Questions from the floor:

What metrics do you use to evaluate the effectiveness of PMOs?

Van Bibber: The value of a PMO is reflected in the quality of the projects that the PMO is managing. The PMO's effectiveness is manifest in the projects' performance.

Johnston: A good example is warranty rework reduced by 30%. Other manifestations are increased follow-on business from existing customers (because they are satisfied) and more new business.

Keane: We used questionnaires to measure customer satisfaction. The low scores we attacked with project management.

What would you do differently with your next PMO?

Johnston: Identify the champions in the projects early on. Win them over to the PMO's mission such that they do not become saboteurs of it.

Keane: Strive to communicate the PMO's value more objectively and less subjectively.

Van Bibber:

1. Reevaluate the PMO's role more often.
2. Do not place the PMO into IT, but instead into the business office.
3. Avoid any ambiguity about who owns the PMO.

What kind of training did you provide to your staff?

Keane: On-the-job mentoring and contract training in project management.

What is a good size for a start-up PMO and what role should this PMO take?

Johnston: This depends on the size of the organization, on the budget and on the staffing that the organization is willing to support.

Keane: We started out with just myself, another project manager and two analysts. Later on, we added more people to the PMO and ended up with a team of 20. However, you cannot just add more staff without also showing the value coming from it.

Van Bibber: The answer depends also on the model you choose for the PMO. The PMO can either be a center of excellence that promotes standards and procedures for managing projects, or it can be a project governance office, which monitors, manages, and measures projects and their outcomes. This second model requires more resources.

George D. Meier, PMP

PMI-OC 2003 STRATEGIC PLANNING

The PMI-OC Board of Directors is committed to the success of the chapter. The PMI-OC Board has been actively listening to chapter members and developing a strategic plan for 2003 and beyond.

In August of this year the Board and chapter members met at a planning session to begin the development of long-term strategic and short-term tactical plans for the chapter. Session attendees developed a planning framework based on the PMI Component Maturity Model. The PMI Maturity Model stages are:

- Organizational
- Operational
- Developmental
- Strategic
- Maturity
- Revitalization
- Dissolution

The August planning session attendees agreed that PMI-OC is completing the development stage other and has recently broken ground into the strategic stage. As the chapter moves from one stage to the next the structure, governance, and core competencies shift. Subsequently, Board job descriptions change, the Board shifts focus to a more strategic nature, committee structures are developed to spread the responsibility and fine tune operations, benchmarking activities are employed, value-added to members is enhanced, and policies and procedures are changed, accordingly.

In October volunteers **Adrienne Keane** and **Victoria Flannigan** worked the Board to develop an initial draft of goals and objectives using the August planning framework. Board members wanted to see if the draft goals and objectives met the membership's needs. Subsequently the Board put together a survey in order to provide all PMI-OC members with the opportunity to communicate their expectations for the chapter.

The member response to the survey by those polled was phenomenal. **We sincerely appreciate all the responses**. Without the candid and direct comments provided, it would be difficult to direct and increase focus to targeted areas for improvement. (VP Membership Glen Fujimoto is reporting detailed membership survey results in a series of *Milestones* articles. The second of this series appears this month.)

The comments from the survey indicated areas that the chapter was doing well and areas that needed improvement. These include:

- Dinner Meeting Logistics
  - Food and Service
  - Cost
  - Location
  - Alternate Meeting Dates
  - Networking
  - Facilities
  - Parking
- Educational Institutions Relationships
- PMP Preparation Workshops
- Volunteer Opportunities
- Board of Directors Responsiveness to Questions
- Opportunities for SIG Participation
- Career Development Opportunities
- PDU Opportunities
- PDU Tracking
- Association with Other Professional Organizations

We hear you and we are taking action.

The Board to meet to further develop strategic and tactical means to focus on areas of the survey. This was not an easy task. The Board put aside family and the weekend to sift through history, data, and strategize for 2003 and beyond. Over two and a half days together in November 2002 the Board accomplished the following:

- Finalized Long-Term Goals (3-5 year range)
- Finalized 2003 Objectives
- Identified 2003 Chapter Initiatives
- Revised and Completed Board of Director Job Descriptions
- Identified Operating Committee Structure
- Defined Board of Director Responsibility Matrix
- Determined Budgeting Strategy to Meet Revised Structure
- Developed Feedback Mechanism to Members
- Developed Chapter Knowledge Management Repository

These are exciting times for our chapter. Many of you indicated in the survey that you are willing to volunteer some of your time to help manage the chapter. The membership and the Board sincerely appreciate the offer to volunteer. We have and will be contacting you before the end of the year to plan for a great 2003. As we move forward with a higher level of change I recall an old Chinese saying, "Change is difficult but crucial to success."

The Board and committees will be communicating to members on a continuous basis as the chapter continues to grow and prosper. **Help our chapter by giving us feedback, any kind, any time, any where. We Welcome It.**

If you have any comments or questions, please call or send any of Board member an e-mail.

Mike Beard, PMP
PMI-OC VP Operations (acting)

PMI-OC Board Strategic Planning Session attendees at work.

FIRST ANNUAL O-C CHAPTER MEMBERSHIP SURVEY RESULTS

Part 2 The following is the second part of a three part series, publishing the **First Annual Orange County Chapter Membership Survey** results.

The Board has reviewed the survey results and has used them in determining the chapter's direction for 2003. We have also read through the comments and are working to address any concerns that were raised. We also heard from a number of members indicating their willingness to volunteer their time for the chapter. Anyone who expressed interest in volunteering should be receiving some contact from one of the Board members. As we put together our committee structures for 2003, we will be able to convey the current chapter needs and match them with our volunteers.

If anyone has any questions regarding the survey, feel free to contact me.

Glen Fujimoto
VP Membership

3. What attracts you to attend the monthly dinner meetings? (Select at least one)

	Response Percent	Response Total
Sharing Knowledge with Others in the Profession	34.1%	92
Networking	51.5%	139
Presentation Topic	68.7%	184
Do Not Attend Dinner Meetings	20.4%	55
Other (please specify)	6.7%	18
Total Respondents		270
(skipped this question)		17

4. Why don't you attend dinner meetings? (Select all that apply)

	Response Percent	Response Total
Inconvenient Day	14%	7
Inconvenient Time	34%	17
Inconvenient Location	16%	9
Too Expensive	12%	6
No Interest in Presentation Topics	10%	5
No Value	6%	3
Other (please specify)	44%	22
Total Respondents		50
(skipped this question)		237

5. What are your plans for Project Management Professional (PMP) certification?

	Response Percent	Response Total
Currently PMP	45.3%	122
Within One Year	35.6%	96
More Than One Year	8.1%	22
No Plans	10.4%	28
Not Familiar with PMP Certification	0.7%	2
Total Respondents		270
(skipped this question)		17

6. Does your employer reimburse you for any of the following? (Select all that apply)

	Response Percent	Response Total
Annual PMI Dues	54.1%	145
Monthly Dinner Meetings	26.9%	72
Exams - e.g., PMP	39.4%	103
Classes	39.6%	106
Seminars	27.6%	74
No Reimbursement	21.3%	57
Not Applicable (Currently Self Employed/Unemployed)	14.9%	40
Total Respondents		268
(skipped this question)		19

WHY I VOLUNTEER
FOR PMI-OC

- To expand my knowledge of project nanagement:

  Being a member of a prestigious organization like PMI and by being active in the local chapter, i.e. PMI Orange County Chapter, helps me in expanding my knowledge on project management. I meet several interesting people during chapter meetings, and during my volunteer work for PMI Orange County Chapter, which helps me to gain more depth in practical project management methodologies.

- To help the PMI Orange County Chapter grow. My active participation role with PMI Orange County Chapter included or includes:

  I am now a Website Committee Member for PMI Orange County Chapter and called the Quality Guru by Kristine Munson, VP Communications of PMI-OC.

  Attended the PMI-OC 2002 Planning Session held in November 2001, however my viewpoints were successfully put in the parking lot at the end of the planning session.

  Recently I participated in a golf putting competition at Irvine on the PMI-OC Volunteer Appreciation Day here in California.

- To share my practical and theoretical knowledge of project nanagement:

  Immediately after I passed the PMP Examination in September 2001, I shared my PMP (passing) examination experience with the PMI-OC group by writing an article on Tips & Techniques for passing the PMP Examination that appeared in PMI-OC December 2001 *Milestones*.

- To get PDUs to maintain my PMP Certification:

  As every PMP knows, that in order to maintain one's PMP, one has to continue to excel in the project management profession. To volunteer with PMI would be one of the several ways to achieve excellence in the project management profession.

  Being a member of PMI since May 1999, some of the key benefits that I obtained from PMI-OC include:

- Learning about a PMP Workshop organized by PMI-OC along with the PMI LA Chapter in 2000 and participating in the workshop that led me to achieve the goal of obtaining my PMP Certification. I still remember the effort I took to attend the workshop and the effort following that to pass the PMP examination. I used to work for Ernst & Young Application Services LLC (now called Cap Gemini Ernst & Young Global Operate – Americas) and I was on a project assignment at Overland Park, Kansas. I used to fly from Kansas, MO to Orange County and then drive to LA County to attend the PMP workshop. The PMP Workshop was well organized and I met very friendly workshop participants who were willing to share their knowledge. I was also in a group study program resulting from the PMP Workshop. I also got encouragement from my management superiors at Ernst & Young Application Services LLC, in my preparation for passing the PMP examination.

- Obtained significant networking opportunities that helped me to advance myself in the project management arena. Through the PMI-OC Chapter, I came to know of gantthead.com, and I recently published an article on gantthead.com. The article titled "How to Avoid Common Pitfalls in Project Management" appeared on September 30, 2002 on gantthead.com. Seeing the common pitfalls in project panagement in my 16+ years experience in the IT Industry across the globe, I provided my tips for better project management in this article .

- Received many job leads from PMI-OC during this difficult economic period.

The bottom line of why I volunteer for PMI-OC is that I want to make a significant contribution to the PMI Orange County Chapter and to the project management profession.

Shyamkumar Narayana, PMP

Let us know why you volunteer. Send your reasons to Kristine Hayes Munson (kristine_munson@hotmail.com) for inclusion in an upcoming issue of Milestones .

PMI-OC
Long-Term Goals

1. **Maximize Stakeholder Value**
   We need to enhance the value to our Chapter membership and the products and services we offer to individuals and businesses in order to attract new members and business partners (businesses, educational institutions, vendors, etc.) at a growth rate consistent with PMI trends and increase membership and partner retention and satisfaction at rates above PMI trends.

2. **Achieve Strategic Organizational Maturity** According to the Component Organizational Development Model, our Chapter is currently in the Developmental Stage of maturity. We need to fulfill the requirements for the Developmental Stage and focus on fulfilling the Strategic Stage requirements.

3. **Run the Chapter like a Business**
   Due to continued and projected growth of our Chapter, we need to establish the infrastructure required to more effectively manage and operate an organization of this size.

PMI-OC
2002 Objectives

1. Develop a strategically focused Board by establishing operational committees.

2. Support PMI-OC member project management career development by:
   - Enhancing existing services
   - Establishing one to three new services

3. Build PMI-OC brand recognition in Orange County

4. Build current and future leadership within PMI-OC

5. Establish a process to gather, analyze, incorporate, and report stakeholder feedback

6. Establish an infrastructure that supports efficient chapter operations and management

7. Establish the capability to capture, manage, and deliver PMI-OC intellectual property

Watching for Reverse Delegation!

You're a pretty good project manager, and you've got the best people you can find on your team. They bring you the technical skills and knowledge to bring the product to your customer. You are respected by both the customer and team. Then one day one of your technical leaders asks you if he/she should go with technical option A or B. What do you do? Nothing!

If you make the decision, you are stripping the technical leader of their delegated power over technical decisions in their area of expertise. Their expertise is exactly why you selected them to be part of your team, to keep you out of technical problems. Your skill is in project management; theirs is in depth technical knowledge.

What do you do? You force the decision back to them, as long as they can meet your cost, schedule, and performance requirements. It's a technical decision. It's their decision.

Why did the technical leader come to you in the first place? They respect your authority as project manager and sought your advice in this technical area. After all, you are the project manager! Or, they may not have felt empowered to make the decision, a problem you need to fix.

What if you make the decision? Then you, who lacked the expertise (or you would not have this person on your team), perhaps made a flawed decision. 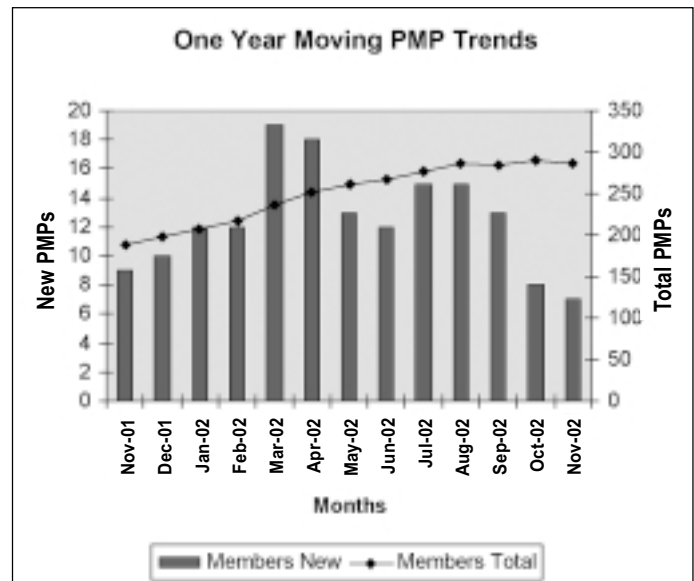Now the downstream problem you have created is due to you, not the technical team. The decision you delegated to them has been delegated back to you. Reverse delegation.

So when do you need to act? When the technical team can't agree, you need to break the deadlock. Or if one approach has more risk than another, you need to make the decision since you manage project risk. Perhaps you're not a expert in the technology, but you have to make the call. You get as educated as possible from your technical team, weigh the possible outcomes and risks, and make the decision. The project was stalled, and you had to make the best decision you could, and now you've removed the risk from the technical team and put it own your shoulders. The result is now simply due to your decision, not the technical team. You acted when action was needed and assumed the risk for the team. You have advanced from demonstrating management skills to showing leadership.

Ray Stratton

Ray Stratton is president of Management Technologies. His firm provides project management process engineering, scheduling services, training and consulting. Ray has recently presented at PMI 2002, Project World 2002 – Chicago. He is the newly elected VP of Research and Standards for the PMI College of Performance Management, and Chair of the Cal Poly San Luis Obispo Computer Science Industry Advisory Council.

Membership and PMP Trends

Try Your Knowledge on PMP Exam Questions

(Answers are on page 18)

Here is a sample of some questions:

1. A key tool and technique used in project plan development is*:*
   a. Performance measurement.
   b. Computerized tools.
   c. Alternatives identification.
   d. Project management information system.

2. The purpose of scope planning is to:
   a. Define the project manager's authority and responsibility.
   b. Establish the business need for implementing the project.
   c. Link the project to the organization's strategic plan.
   d. Develop a scope statement as the basis for making future project decisions.

3. The project manager is responsible for both leadership and management of the project. Leadership differs from management in that:
   a. Leadership is concerned with consistently producing results stakeholders expect.
   b. Management is concerned with consistently producing results stakeholders expect.
   c. Leadership involves making sure all of objectives of the triple constraint in the project are met.
   d. Leadership involves establishing direction, aligning, motivating and inspiring others.

4. Tools and techniques for quality control are:
   a. Benefit/cost analysis, flowcharting and cost of quality.
   b. Control charts, Pareto diagrams and inspection.
   c. Work results, checklists and rework.
   d. Quality audits and operational definitions.

PROJECT FROM HELL

As project managers, we're always concerned about how well our projects are managed and whether or not they'll be successful. We concentrate on managing the efforts and communicating the project status to our managers. This month we'll take a different look at a "Worst Project." We'll look at it from the perspective of a technical team member who walked into an existing Data Warehouse effort and immediately recognized that this was a project in serious trouble.

In the past, I've always enjoyed the more challenging projects on which I've worked. Sure, there were horror stories, but technical people love to share them at lunch or over drinks and to talk about how dumb some of the management decisions are. It's a bonding thing.

I enjoyed the challenges until I consulted at what I call, "The Bad Data Place." I use capital letters because, even after 20 years in technology I'd never seen anything to approach it for sheer incompetence. I am grateful that this company is only a national telecommunications provider. If they were in a critical industry like health care, I would be on the first plane out of the country as soon as I needed medical treatment.

How did I immediately recognize there were problems? My first clue was the lack of a project plan to implement the data warehouse. In fact there was no plan at all – no risk mitigation plan, no scope management plan, nothing. All they had was a deadline from management saying the data warehouse would be operational by a certain date.

The second clue? There were very few standards in place, and even the standards that existed were violated because there was no enforcement. There were no standards for reports. Table and field names were not consistent. There were no standards for queries against the database. For the data in a data warehouse to be accessible the first step in the process is to always define a naming convention and follow it religiously.

My third clue was there was no complete log of project issues or whether known issues had been resolved. Similarly, there were no change control processes. Updates to processes changing how data was loaded or changes to the database structures were done on-the-fly, even though this was a production environment. Sometimes, if your karma was good and the person making the change remembered, you'd receive an email that briefly described some recent changes.

My last clue was that the project sponsor wanted the users to sign off on the data warehouse without current and accurate documentation. Basic documents that were missing or outdated included ERP diagrams, data conversion field mappings, and a data dictionary.

By the time I had been there for two weeks, I was getting a clue as to how bad the situation was. But these problems were only the tip of the iceberg. The serious problems became apparent as the information from the data warehouse was accessed. The reports that the executives used to manage the company came out of data warehouses that contained massively inconsistent, and sometimes missing data. And since this was a telecomm firm the amount of data was massive. This was a multi-terabyte database with millions of records.

The fact that the data was just Plain Bad should have been no surprise given the fact there was no project plan, inaccurate documentation, no standards, no change control and no problem resolution. What was most amazing was that management expected the data to be accurate within 2 or 3%. They wanted results they could compare to other systems they had so they could assure themselves the numbers were consistent. But getting accurate data for analysis requires standards, processes, and procedures, none of which they had.

As a consultant, I'm used to being on projects that need help. But this project amazed even me. I did take away a lot of horror stories and lessons on how not to do something that I'll share with other developers.

I did learn some lessons from this horrible assignment:

One: Even if you're great, change has to come from the top down. You can't clean up the Aegean stables by yourself.

Two: Don't take the bad data personally. If a company's processes are poor, no amount of scrubbing will resolve those issues.

Ed. Comment: No project plan, no standards, no issues log, no change control. Would you have wanted to manage this project? Would you want to be held accountable for the accuracy of the reports coming out of this data warehouse?

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 Hayes Munson, kristine_munson@hotmail.com. All possible names, places and associations will be removed from the stories and they will be published in confidence.

"I DON'T KNOW HOW TO DO THIS."

I recently met with a client's project team. Five of us were eating pizza and discussing an ongoing multi-million dollar negotiation with one of their clients, Acme.

The project was at a review milestone . . . a go/no go decision was pending. Project definition was complete. Detailed project plans had been created, and the team believed they were credible. The business case had been analyzed, and costs (and price) had been determined. The problem was this: Acme didn't want to pay what the project team believed it would cost to get the job done.

The team told me that they were trying to faithfully respect their project triangle.[1] They didn't believe the resources required to do the work could be reduced further without compromising the quality of the product, increasing risk beyond tolerable levels, or extending a schedule that wasn't negotiable. My client is an expert in this field, and they had done their homework.

They were concerned Acme's procuring agent was asking them to cut their price just to see what would happen. They weren't sure how to respond. There wasn't huge profit built into the price, and the margins could not be trimmed further. Canceling the project would be painful after the investment to date. If the project had to be canceled, my client wanted to do it with as little damage to the relationship as possible.

Having explained the situation, they looked to me. I tried to confirm my understanding, "What you are telling me is that you don't know how to reduce the price further without jeopardizing project success?"

They agreed.

" . . . and Acme approached you because of your expertise in this field?"

Again, they agreed. "We aren't the lowest price developer in our industry, but we have one of the best track records of timely delivery of quality products."

"And you aren't sure what to say when they push back on price?" I continued.

Again, agreement, "It is hard to discuss with the Acme business people conducting the negotiation without getting into technical details they don't understand," the project manager said.

"All I can recommend is that you tell them what you told me." I said.

"But they don't seem interested in our explanation."

"Then stop explaining unless they ask. Tell them what you told me: **'We don't know how to do this for less than our quoted price,'** and wait to see what they say."

I wish I were the original author of this advice, but it's ancient – If you don't know how to do something, the best thing to say is **"I don't know how to do this."**

Assuming your integrity is not an issue, this statement is hard to argue with. The project sponsor may be disappointed, but has only four rational options:

1. Review existing plans with the team and other subject matter experts to see if collectively they can discover something the project team didn't see
2. Change the project triangle boundaries to match what the team believes is needed
3. Find someone else to do the project
4. Cancel the project

If you REALLY don't know how to do something, none of these options should be too intimidating.

- The first gets new eyes on the problem and will either confirm the original finding or help gain new insight into the problem
- The second addresses the team's concerns
- The third puts the monkey on someone else's back . . . either the new team knows something you don't (and watching them will be educational) or they are going to make a smoking crater in the ground (and your credibility should improve)
- The final option may be the best if the business case doesn't justify what the project will really cost . . . cut your losses early

If I were a project manager working for you, and I didn't know how to meet the objectives you laid out for me, wouldn't you want to know?

Payson Hall

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[1] Project boundaries can be thought of as a triangle comprised of Schedule, Scope, and Resources. Projects are defined in terms of the triangle, planned in terms of the triangle, and tracked and measured in terms of the same triangle.

1. **d.** **Project management information system.** Project Integration Management, *PMBOK® Guide 2000*, paragraph 4.1.2.3, [Planning]

2. **d.** **Develop a scope statement as the basis for making future project decisions.** Scope planning output [Planning] *PMBOK® Guide 2000*, paragraph 5.2.3.1/

3. **d.** **Leadership involves establishing direction aligning, motivating and inspiring others.** The project management context, *PMBOK® Guide 2000*, [Leading] paragraph 2.4.1.

4. **b.** **Control charts, Pareto diagrams and inspection.** [Controlling] *PMBOK® Guide 2000*, paragraph 8.3.2.

REALITY CHECK

Sex and the Management Information System

Not far from my house is a glorious park. Very near this park, at the intersection of two privately-owned homes' lots, is a crabgrass hedge of Cecil B. DeMile proportions. It's apparent that each homeowner, if he or she even notices, believes the flora monstrosity to be the other's responsibility. In the meantime, this one plant, all by itself, may attain crabgrass sentience, and thence civilization. I'm fairly sure each lawn in my zipcode battles the offspring from crabzilla.

If only perpetrating project management was as easy! Well, perhaps it is – and we just need to recognize the most effective models for furthering it. In other words, our project management tricks and tactics need to reproduce, and often. We need to make it so easy for PM to proliferate that those opposed can't offer up the same lame excuses about "It's too expensive!" or "It's too difficult!" In furthering our agenda, let's make it sooo easy and soooo common, that the nay-sayers will need to get soooo far out on that idiot limb of theirs that cutting them off is virtually automatic.

Certainly, within PMI's own ranks are those opposed to quick, easy, and widespread dissemination of project management. These people often rely on the implementation of PM as their main source of income, and if it's quick and easy, their big fat consultant's fees become superfluous. I actually know one fellow who insists that *any* risk analysis *must* be performed using Monte Carlo simulations. While conveniently ignoring that categorized risk or even decision tree analysis are usually much simpler and cheaper, he is very aware that Monte Carlo almost always requires specialized software – software that he just happens to operate proficiently. Quick and easy risk management would undermine the demand for this fellow's services, so . . .everything absolutely has to done using Monte Carlo, or else it's just not *right*, don't you know. I wonder, if this fellow were to find himself near starvation, if he would reject proffered food if the garnish was not posed just so.

Generally speaking, there are two main barriers to implementing project management: the technical aspects, and organizational resistance. The technical aspects really aren't that tough, but organizational resistance, often grounded in sheer unreasonableness, can be overwhelming. If the political resistance can't be helped, the answer lies in making the technical aspects so falling-off-a-log simple that any resistance will be seen as, well, stupid.

For example, does your organization eschew basic schedule management? That's unfortunate. Do they have any kind of an action item tracking system? Humbly make this suggestion: by collecting percent complete data, and dividing that number into cumulative duration (we *do* know then the action item was opened, don't we?) you can calculate estimated duration. By comparing that date to the original target completion date, you know instantly which action items are going to be late, early, or on time. This knowledge is so much more powerful than the insipid number of action items, number overdue, blah blah blah, that you will make the next step towards legitimate scheduling much easier.

The same trick works for easy-to-implement Earned Value. A project doesn't do Earned Value? Not at all? I can hear the "it's too hard to baseline" bleating from here. Capture that percent complete number, and divide it into the cumulative costs to date. You instantly know how much this project will cost at completion – without weighted milestones, time-phased estimates, none of the nominal ecroutrements associated with a full-up Earned Value system. Again, do you realize how powerful this can be? The accountants would give anything to attain this brass ring, this ultimate knowledge of what the project will cost at its completion – and you can have it, using a couple of simple tricks!

If the accountants and financial managers are going to sneer at project management practitioners as if we were pernicious vermin anyway, let's show them – we'll just reproduce our simple systems like crabgrass until no organization is free of them.

Michael Hatfield

Article originally appeared in October's Measurable News. *Reprinted with permission.*

PMI® MONTHLY MEETINGS

DINNER MEETING

TUESDAY, DECEMBER 10, 2002

Program: **Leading High Impact Teams**

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

Bring a toy for Toys for Tots*

*If you pay cash at the door, the PMI-OC dinner meeting cost will be $20 with donation of $10 or a $10 unwrapped toy for Toys for Tots. If you prepay via credit card, PMI-OC will donate $10 to Toys for Tots.

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, December 5th, to obtain the "In Advance" price. Reservations made after 5:00 pm, Thursday, December 5th, 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, December 8th 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

The Breakfast Round Table meeting of November 26, 2002 was another great success.

There were sixteen attendees in all, including large publicly owned companies, medium sized consulting firms, self employed and those seeking new positions. We even drew from the Columbus, Ohio chapter of PMI with **David Davis** visiting relatives here in the west and considering Southern California for his next career move. There were a total of nine PMPs and three non-members of PMI who I am sure received a very favorable impression.

Topics suggested for discussion included overcoming PMI resistance, managing small projects, cost control, time reporting, project change management, training project managers, and projectizing workflow. And those are just the ones we didn't get to. After the usual vote for the three winning topics, those that would be discussed for fifteen to twenty minutes each, the winners for in-depth discussion were project management measurements of success, post project assessment processes, and Critical Chain theory. As usual, there were experts in each topic and contributions by many. Judging from the post meeting comments, all benefited by the discussions and I counted at least ten still in discussion ten minutes after meeting end at 8:30 a.m.

Some of the sub-topics with the main topics included how to schedule multi-tasking, buffer management, pre-project selection, scope verification, when to terminate a project, ensuring repeatability, public versus private project assessments, brainstorming versus questionnaires, using questions, the answers to which can be metrics for growth and future project management maturity measurement, among many others.

As usual, the inputs were many, varied, experience tested and pragmatic. Bring your best note taking techniques and join us for the **NEXT PMI-OC Breakfast Round Table**, **NOT in December, but in JANUARY, the fourth Tuesday at 7:15 a.m. at the Costa Mesa Hilton**. Register online at www.pmi-oc.org. Call or email Tom Sippl at 949-219-7798 and tsippl@PacificLife.com for comments or questions.

Thomas L. Sippl, PMP

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**.

JOB POSTING TABLE
Share available employment opportunities with PMI-OC dinner meeting attendees. Submit your opening to Theresa Theiler, **tt1591@sbc.com**.

COMING EVENTS

DECEMBER 10 DINNER MEETING
Leading High Impact Teams
Speaker: Rachel Lewis
Vendor Showcase: Innovative Management Solutions
See page 1

JANUARY 14 DINNER MEETING
Doing More with Less – Four Productivity Life Savers
Speaker: Joan Knutson
Vendor Showcase: ESI

JANUARY 25 PMP PREPARATION 2003 WORKSHOP
See insert

JANUARY 27 PMI-OC BOARD MEETING
E-mail info@pmi-oc.org for meeting information

JANUARY 28 BREAKFAST ROUNDTABLE
Note: No Breakfast Roundtable will be held in December
See article on page 19

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RETURN SERVICE REQUESTED