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VISION  
▶ We are recognized as the volunteer organization of innovative project management professionals.

We provide value to our stakeholders and the community at large. We promote the development of project management as a benefit in all industries.

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

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## JANUARY 13TH PMI-OC DINNER MEETING

# No-Bull Project Management

By David A. Po-Chedley

Project leaders **can** remove barriers to ensure individual and team success. The number one barrier is lack of management support or buy-in. Critical in these times of changing priorities, **David A. Po-Chedley** will reveal the leadership practices that tend to lose management support and the practices that help gain management support. In addition, participants will be challenged to apply some of the ideas when they return to the office.

There are many things that cause projects (or project teams) to lose management support. Can you identify with all of the efforts to cover tracks, fuzzy communication, etc., that suck energy out of the project? If yes, you may recognize yourself and others in this lighthearted review of unproductive, time-consuming tactics that tend to impede rather than facilitate management support.

Project leaders can get so caught up in the business of surviving that they don't notice some of the downright silly things that they do. If we step back from the action, the games people play look pretty ridiculous. These include the "blame game," the dissension, internal turmoil, and finger pointing that loom when times get tough. The "hunker down game" is most visible during the gut-wrenching periods when conflict rears its hideous head. By playing the "information manipulation game," people covertly omit or twist data to suit their own political interests. In the "territorial game," people start to construct artificial boundaries between themselves and others; the resulting turf battles breed a mentality of us versus them. And then there are self-defeating behaviors such as C.Y.A., looking busy, droning on, dumping the problem on somebody else, or good old fashioned sucking up. Some of the charades and posturing such as "creating a crisis to get your budget increased" or using "flim-flam, gimmicks, bells and whistles" to get management's attention are funny.

All these practices impact productivity and the bottom line, and senior management is not impressed, nor particularly supportive. So what do effective project leaders do that positively attracts management's attention and helps to gain management support?

Join us and learn the No-Bull practices that work in the real world. This session is designed to be interactive, fun and productive. At the conclusion, attendees will walk away with practical tips for navigating the politics and people issues that challenge many projects.

**David A. Po-Chedley, PMP.** Dave has been actively involved in project management for over 25 years. During this time, he has worked on and managed projects and has helped others manage projects effectively through consulting and training. He is president of Cambridge Consulting, a firm dedicated to enhancing project effectiveness for clients around the world. Thousands of people from organizations in North America, Europe, Asia, Australia and South America have benefited from workshops and consulting services provided by David Po-Chedley. They include General Dynamics, Fleet Boston Financial, Boeing, General Motors, US Airways, IBM, Motorola, OppenheimerFunds, AT&T and General Electric. Dave is a faculty member for the PMI Seminars World program.

**Vendor Showcase: Compuware Corporation**

See ad on page 3

## PMP RENEWAL

Currently, PMI Records is processing claims within two to three weeks of receipt. Individuals should review their online PDU transcript to check their PDU history, <http://www.occe.ou.edu/aia/pmi/PDUlogin.php3>.

All PDU claims received by the end of the year will be processed before action is taken against any certification because of expiration date, suspension deadline or fee implementation date. Delays in claim processing are caused by last minute PDU submissions. To avoid these delays, PMPs should submit their claims when activities are completed throughout their cycle.

PMPs are automatically sent an Application for Certification Renewal when they meet their PDU requirement. Individuals who report the necessary 60 PDUs by the end of 2003 will be given 90 days to return this form without penalty, even if this timeframe extends beyond their deadline.

PMPs who are approaching their certification expiration date of December 31, 2003 must have all of their required PDUs completed and reported by the end of 2003 to avoid suspension.

Individuals who are approaching their PMP suspension deadline of December 31, 2003 must have all of their overdue PDU requirements completed and reported to the PMI Records Office by the end of 2003.

Failure to complete this requirement will result in the official expiration of their certification.

Questions on the CCR program can be directed to PMI's Certification Department at [adam.potts@pmi.org](mailto:adam.potts@pmi.org).

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## THE PRESIDENT'S COLUMN



### Happy New Year!

I am excited and overwhelmed to serve as the 2004 PMI-OC president. I'd like to take a few moments of your time to introduce myself and share with you the board's exciting 2004 plans.

### 30-Second Commercial (Give or Take)

I have managed a wide range of business process improvement and information technology projects in the finance, printing, and construction industries. My current projects focus on developing change control methodologies for software, infrastructure, and related documentation, as well as facilitating management responses to internal and external audit requests, at an investment management firm.

I joined PMI in 1999 and wasn't very active until I found PMI-OC in 2001. Choosing to become a PMI-OC volunteer was one of my best personal and professional decisions. As a volunteer, I learned about developing an e-commerce website, experienced the challenges of launching new career support services, gained first-hand experience with strategic planning, and honed my overall project management skills. Most importantly, I have the opportunity to work closely with so many other PMI-OC volunteers. I understand why the first line of the chapter's vision statement reads, "We are recognized as the **volunteer** organization of **innovative project management professionals**." I am looking forward to conquering new challenges this year together with other volunteers.

### 2004 Planning Process

The 2004 board members can definitely be classified as innovative project management professionals. As a team, the board synthesized the feedback received from the 2003 membership survey and the volunteer planning session. The board thoughtfully established challenging goals, set objectives, and planned strategic initiatives that will help PMI-OC achieve its vision and mission.

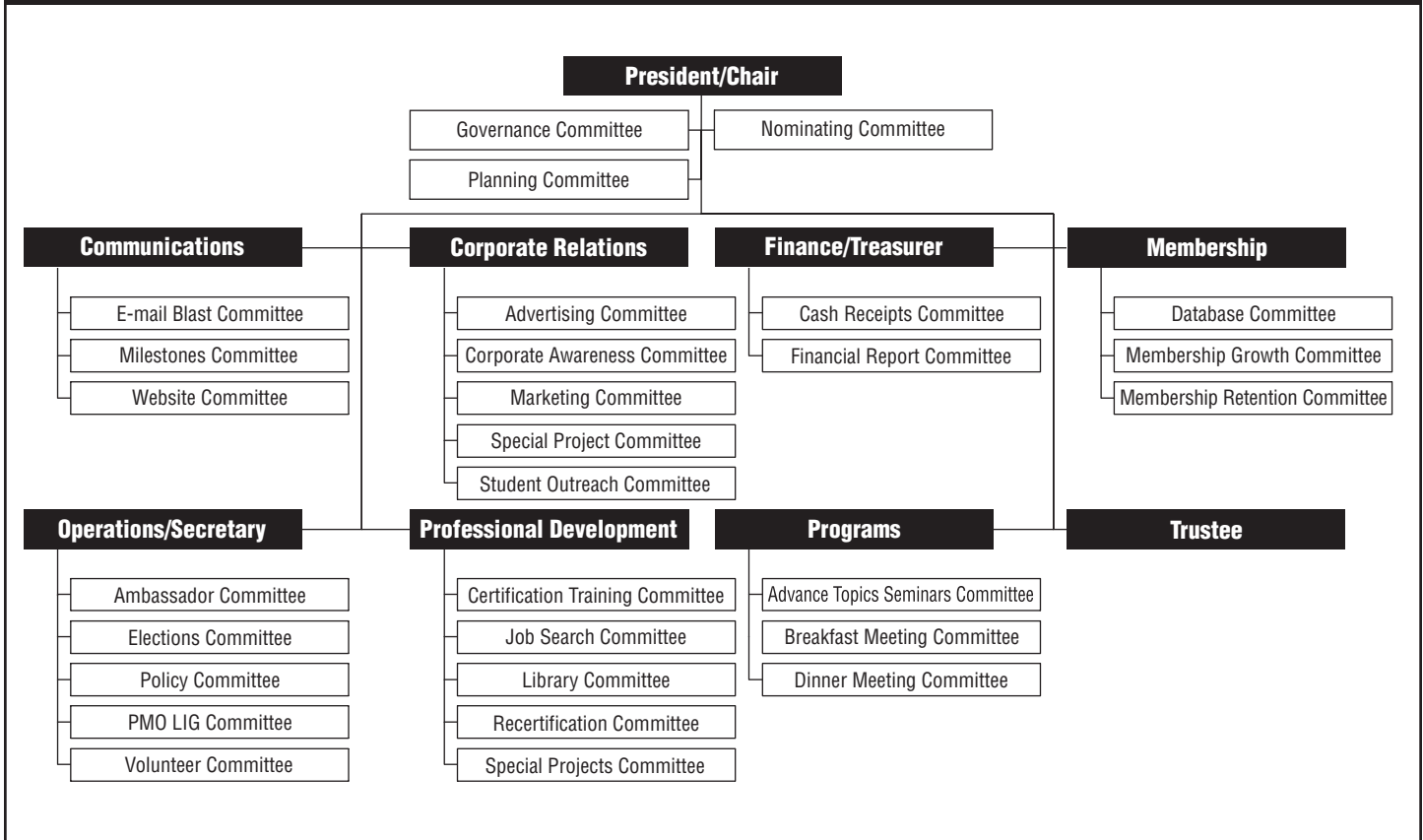
### Three to Five Year Goals

1. **Maximize Stakeholder Value.** We will enhance the value of our chapter products and services offered to individuals and businesses to attract and retain members and business partners at a rate consistent with market trends. We continue to make strides to achieve this goal originally set by the 2003 board.
2. **Strengthen Volunteer Organization.** We will improve the way we recruit, manage, and recognize our volunteers to attract more volunteers and to achieve our goals more effectively. This is a new goal in 2004.
3. **Run the Chapter Like a Business.** We will enhance our chapter infrastructure to more effectively manage and operate an organization of this size. The 2004 board revised this goal to include achieving the PMI component maturity model's strategic level.

### 2004 Objectives (Strategies to Achieve Our Goals)

1. Enhance the **volunteer program** to increase participation and satisfaction by defining and communicating volunteer opportunities, increasing and enhancing volunteer recognition, and improving volunteer management processes.
2. Support members' project management **career development** and employment needs by enhancing existing services, and building employer and recruiter relationships.
3. Enhance **continuous improvement** processes to increase stakeholder satisfaction and organizational responsiveness by building formal, repeatable mechanisms supporting all key programs, and developing processes to gather, analyze, incorporate, and report.
4. Build **brand recognition** in Orange County by educating stakeholders, and enhancing existing programs while establishing new offerings.
5. Develop a **strategically focused board** to improve chapter effectiveness, efficiency, and stakeholder satisfaction by evaluating and recommending appropriate changes to the chapter governance model, establishing recommended infrastructure, and enhancing supporting capabilities.
6. Enhance **fiscal controls** and accountability to decrease chapter risk and improve effectiveness by modifying financial organizational structure, and developing supporting processes, standards, and metrics.

# 2004 PMI-OC Organization Chart



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**Managing Multi-Site Projects**  
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to view complete schedule and course details.**

**For more info, call (949) 824-5414**

W04-41J

## 2003 Toys for Tots Drive



Members of Costa Mesa's Fire Station No. 6 stopped by our December dinner meeting to pick up PMI-OC's Toys-for-Tots donation.



Thanks to the generosity of our members, we were able to fill the washing machine box with wonderful toys. It was a great experience for everyone involved. The chapter will make a \$10 cash donation to Toys for Tot and other deserving charities for all dinner meeting attendees who were unable to bring a gift.

# VOLUNTEERS OF THE MONTH



**Dan Stadler, PMP** (left), receives Certificates of Appreciation from Volunteer Coordinator **J.C. Moreno** honoring him and **Victor Prebyl, PMP** as Joint Volunteers of the Month for December.

## Dan Stadler and Victor Prebyl Jointly Honored as Volunteers of the Month for December

A resolution was unanimously passed at the November board meeting of your chapter designating **Dan Stadler** and **Victor Prebyl** as **Volunteers of the Month for December**. Chapter Volunteer Coordinator **J.C. Moreno** honored them at our December 2003 general meeting by presenting each with a Certificate of Appreciation. Unfortunately Victor could not attend, but Dan accepted the certificate on his behalf.

Dan has been a member of the chapter for over three years now, since about September of 2000, while Victor joined in July 2003, a relative newcomer. Both have become PMPs, Dan in 2000 and Victor in July 2003, almost as soon as they became members of our chapter.

The board unhesitatingly selected them for this month's award for their exemplary volunteer work in support of the hugely successful recent seminar with **Dr. Harold Kerzner**, which was hosted by PMI-OC. But the board's decision was not based solely on this event. Victor is recognized for his invaluable support to the election committee during the balloting process this past October. Dan, on many occasions, was involved in a multitude of small but important tasks, such as helping to set up the registration table, put out the meeting name tags, or help set up or clean up at various PMI-OC events. By his own admission, Dan believes in "servant" leadership, which to him means serving others, setting examples, and giving back to the community in any way possible.

Dan has over 25 years of experience in the software industry as a programmer, quality assurance engineer, project manager, program manager, section manager, as well as product marketing and applications marketing management. Regarding his career aspirations, Dan is interested in directing a project management or quality assurance office. His current goal is to undertake employment in an organization where his varied experiences, skills, talents, and interests can be appreciated.

Both Dan and Victor offered similar comments when asked about their respective career aspirations.

**Victor:** "I want to further explore, develop, and implement best practices in project management."

**Dan:** "I'm looking for someone [company] who is not afraid to hire outside of the box."

We further asked what volunteerism means to each of them:

**Dan:** "PMI-OC is a great organization to be associated with and to get involved with. There are so many people who are great leaders in the project management profession and are great examples and mentors to all of PMI-OC members."

**Victor:** "I have found the PMI-OC chapter to be very supportive, inclusive, and one that you want to be a part of. I have met and worked with some great people and hope to continue to support the chapter."

**Dave Jacob**

# YOU TOO CAN LEAD GEEKS

## Will You Try?

### Geeks? Who are they?

**Paul Glen** gave this definition: geeks are the nerds, computer jockeys, or knowledge workers (aha!) who design, build, test, install, and support computer technology.

In today's knowledge-driven, hyper-competitive 24/7 economy, geeks have become a key weapon in a business' arsenal. Just getting the best geeks isn't good enough. Success requires not just having good geeks, but also knowing how to lead them.

Paul's presentation revolved around this simple point: Geeks are notoriously difficult to manage and lead. They rarely respect (and even if they do, not for very long) the traditional methods for command and control. Ouch!

Where should management turn for help? As Paul couldn't find ready answers in a book, he decided to write his own<sup>1</sup> because in his experience, the common wisdom about leadership doesn't work with geeks. Here are his three reasons:

**Reason 1: Geeks are different from other people.** They respond not at all to traditional leadership, which holds as its fundamental precept that (1) leadership is a relationship between leader and follower, and (2) the focus is on the leader's knowledge, attitudes, beliefs, and ethics. This precept pays little heed to the nature of the followers; it ignores that all followers are not alike and do not all respond to leadership in the same way. Paul referred to geeks as a very special group that "requires different care and feeding."

**Reason 2: Geek work is the intrinsic technological knowledge work that geeks perform.** This work is very different from other types of work. Hence, leaders of geeks should be aware at all times that whom they lead will affect how they lead.

**Reason 3: Power is useless with geeks.** Conventionally, power confers authority; those who are in power command and have influence over others. However, it doesn't, because they aren't, they haven't, and nobody cares. Power simply doesn't work with geeks. Geeks deliver their value, not so much through acts, but through their thoughts. Power is useless for controlling thoughts. Paul couldn't have stated it better, when he observed, "You can use power to make them do things, but you can't use power to make them dream up beautiful things."

Even if geeks aren't the source of innovation, they are very much the implementers of it. Eventually in the course of doing business, any organization is going to rely on technology and will come face-to-face with geeks. It will need the productivity of its innovators and knowledge workers, otherwise it cannot carry out its competitive quest for ever-increased efficiency.

That certainly begs the question: How do you improve the productivity of knowledge workers? The answer, as Paul went on to describe, is rather different from what "common sense" might infer. He began by dispelling the following three common myths:

**Myth 1: Leadership is universal.** Good leaders treat everyone alike. Leaders are by nature people of action. Often, though, they focus on their own tasks and activities without thoroughly understanding the context of their leadership and team environment. These leaders assume that what works in leading sales people, marketing folks, or logistic people will also work with geeks. Wrong! With geeks, most of what works with others is ineffective, if not altogether counterproductive.

<sup>1</sup> Paul Glen: *Leading Geeks—How to Manage and Lead People Who Deliver Technology*. Jossey-Bass (Wiley) 2003. ISBN 0-7879-6148-5.

<sup>2</sup> A quote from Mr. Spock: <http://www.cs.ubc.ca/cgi-bin/nph-spock>



*Frank Parth, VP of Programs, with speaker Paul Glen, author of "Leading Geeks—How to Manage and Lead People Who Deliver Technology," at the December dinner meeting.*

What's so special about geeks? Geeks are very much a self-selecting group. They are more loyal to their technology than they are to you, their supposed leader. How something works attracts geeks far more than what it actually does, because they revere the rational. It's no accident that Mr. Spock is so popular with geeks. They see him as cool, emotionless, godlike.



*"Emotions are alien to me. I'm a scientist."*

*"I object to intellect without discipline; I object to power without constructive purpose."*

*"Without facts, the decision cannot be made logically. You must rely on your human intuition."*

*Mr. Spock<sup>2</sup>*

**Truth:** If you want to lead people, start out by understanding them.

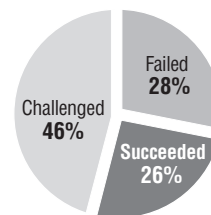
**Myth 2: If you understand the tree, you understand the forest.** Geeks ignore a company's hierarchy deliberately. They have little respect for degrees, PMPs, etc. This doesn't mean that geeks have no hierarchy at all. Instead, they build their own. Their hierarchy is completely separate from that of their leaders. If leaders don't grasp this perspective, they cannot effectively manage their project. In addition, there's usually one or more unofficial leader among the geeks. As their manager, you must recognize, accept, and respect their influence and authority.

**Truth:** Groups are not just a collection of individuals.

**Myth 3: Good leadership can lead anyone to do anything.** Recognize that geek work is completely different from other work. Accept failure as normal (Figure 1). This situation is a common feature of technical work. Not acknowledging this reality is simply foolish. Estimating cost and duration of tasks is difficult, and schedules are in constant flux.

**Truth:** What you lead people to do affects how you lead them.

### Failure is Normal!



*Figure 1: About 46 percent of geek projects are delivered late, over budget, or with many of the promised features missing. 28 percent fail altogether. A mere 26 percent truly succeed.*

*Continued on page 6*



*Paul Glen signs copies of his bestselling book for eager dinner meeting attendees.*

Managers have a hard time dealing with these truths, for their subordinates know more than they do. Such knowledge inversion violates every one of their assumptions about leadership. Paul's key here is not to resist, but to accept it as inevitable. "This is the law of the land. It's neither good nor bad; it just is."

What does leadership mean to geeks? Paul went on to introduce the contents of traditional and geek leadership (Figure 2) for a better picture of the lay of the land.

Consider first the more conventional ideas about the responsibility and tasks of leaders. Conventional leaders focus their attention on directing the activities of followers, and they make the decisions for them.

Most important to the traditional leader: establish and maintain a powerbase. The traditional leader's ability to apply power to enforce decisions, direct activities, and motivate followers drives the responsibilities and tasks of conventional leadership (Figure 2). By definition, or by fiat, there is no ambiguity.

makes progress difficult to measure and elusive to foresee. Rather than being certain about what should be done and how to do it, geeks are often not certain about what precisely they try to accomplish, let alone how to go about it. This is not confusion, but the very nature of geek work.

**3. Provide internal facilitation.** Conventionally, leaders cast themselves as figures of authority to command their followers' action with explicit directions. Rarely productive as an exercise of power in a technical organization, such authority tends to arouse geeks' resistance and consequently limits quality and quantity of their creative output. Geek leaders are much more effective if they facilitate the flow of ideas and activities by ensuring that geek teams and individuals remain connected and coordinated as they independently pursue their work. Geek leaders are thus in the middle of their organization's activities; they have no need for controlling them in a hierarchy. In this way, geek leaders can establish, and maintain, a work environment that accommodates the technological work, and that favors the human needs of geeks.

**4. Furnish external representation.** Effective external representation is crucial to any organization. (Project managers often call the associated activities "stakeholder management.") Geek leadership is no different. The quality of external representation defines the success of a technological group. No matter the technical sophistication and capabilities of a group of geeks, if their geek work is misaligned from the needs of the business they are in, they will not deliver peak value.

- Responsibilities of External Representation**
- Acquire Information
  - Establish and Maintain Alignment
  - Obtain Resources
  - Manage Expectations
  - Project Prominence
  - Protecting Geeks
  - Insulating Geeks
  - Attracting Geeks

What should leaders do to motivate their geeks? Traditional managers often assume that if they identify a goal and provide an explicit incentive (e.g., money, time off, promotion, recognition) their employees will do what they want them to do.



Figure 2: The well-known content of traditional leadership.



Figure 3: The different content of geek leadership: four key responsibilities.

How do leaders of geeks succeed? How do they cope with ever-present ambiguity? To this end, they have the four key responsibilities that appear in Figure 3.

**1. Nurture motivation.** Most leaders want to inspire their followers, imbue their work with passion, and spur them into action. They seek to foster the energy, drive, and commitment of a motivated workforce. As using the same individual techniques with geeks as with other employees won't work, geek leaders do much better by creating conditions under which motivation can develop.

**2. Manage ambiguity.** This is a geek leader's most important responsibility. It's also very subtle. In creative work, ambiguity, as the absence of clarity, is inherent everywhere. It

Not so with geeks! For geeks, leaders must do more than merely elicit behavior; they must encourage creativity. Extrinsic motivation alone can hardly do that. Geek leaders can't create intrinsic motivation either, but they can create the environmental conditions that favor its development.

Here's Paul's recipe for creating a work environment where creativity and energy thrive.

**1. Select Wisely.** The most important thing you, as the leader of geeks, can do to encourage motivation is to choose the right people to be on the right projects. It may seem obvious, but to help a team build intrinsic motivation is to pick people who want to be on the team in the first place. Since you can't imbue geeks with internally generated enthusiasm, select for it.

**2. Manage Meaning.** In their often frustratingly ambiguous world of questions and assumptions, geeks constantly need to make sense of their environment and the meaning of their work. That's where you as the leader come in. You must deliver the meaning of all the disparate facts, frame the situation, and define reality.

**3. Communicate Significance.** Too often, a leader will explain what role a new technology plays in a business and assume that everyone on the team shares the same understanding and appreciation of its significance. Geeks will much more likely develop intrinsic motivation for work that they consider significant, rather than marginal or, worse, irrelevant.

**4. Show Career Path.** Many geeks have a vague sense that there is more to advancing their careers than the mere acquisition of knowledge. You can show them how to grow and coach them in enhancing the value they deliver in ways that are compatible with their interests and skills.

**5. Projectize.** To you project managers, this is the very essence of your professional value.

**6. Encourage Isolation.** Although geeks need free-flowing communication within their own work groups, collective seclusion provides fertile soil for motivation and cohesion. Physical isolation enhances motivation. It provides an opportunity for focusing on the geek work at hand without tripping over the distraction from other projects or office gossip.

**7. Engender External Competition.** Geeks love a good contest. It brings out their competitive spirit and love for games. They can engage in their otherwise seldom expressed enthusiasm. A good competition also helps develop group cohesion. Nothing is as unifying as the presence of a common opponent; intragroup rivalries are set aside, and power struggles are subordinated to the common goal of winning the competition.

**8. Design Interdependence.** The personal bonds of loyalty that develop between peers can greatly enhance intrinsic motivation, much more so than can bonds between a geek and a leader. When they know that a colleague is relying on them to complete their work, they find it much easier to put in the extra effort than they would for meeting some externally imposed deadline.

**9. Limit Group Size.** The larger the work group, the less conducive is the environment for developing intrinsic motivation. If a geek feels like a minuscule cog in some giant machine, the pull of interdependence weakens. Large abstract groups don't elicit the same feelings of loyalty and obligation, as do tightly cohesive ones.

**10. Control Resource Availability.** Carefully control the resources available to a project team, be that money, people, time, or training. There's a delicate balance of resources that will encourage a group's enthusiasm. Too many, or too few, resources will diminish the geeks' interest in their work.

**11. Offer Free Food – Intermittently.** Never underestimate the power of free food. There's no rational explanation, but to geeks, free food offers major support in developing motivation, far more than does the equivalent amount of cash.

One other aspect of geek leadership deserves mentioning. It is in many ways easier to sap enthusiasm out of, than inspire it into, a group of geeks. These are the common pitfalls:

- Exclusion from Decision Making
- Inconsistency
- Excessive Monitoring
- Focus on Tasks not Goals
- Unqualified Evaluation
- Misaligned Extrinsic Motivators
- Artificial Deadlines
- Changing Deadlines
- Organizational Disinterest
- Teams Without Skills

Geeks hate being left out of the decision-making loop, Paul explained. They hate being at the receiving end of directions after all the discussions and deliberations are finished. In their technocentric view of the world, it is inconceivable that anyone could make a good decision without first consulting them. They perceive their feelings of competence and independence undermined. They feel limited in their sense of control over their environment. Leaving them out destroys their intrinsic motivation and makes them insecure. Obviously, not all decisions can include everyone, but explaining the decisions and involving key geek representatives will alleviate this problem.

Geeks expect their expertise to confer them the respect awarded to any professional. Having someone look over their shoulder makes them feel like an apprentice, which they take as a sign of lack of confidence. Geeks also hate it when someone picks a date for an important deadline randomly out of a hat and expects him or her to work day and night to meet it. Schedules are most effective when everyone involved accepts them as reasonable and necessary. Good deadlines enhance motivation; artificial ones undermine commitment.

Likewise, feeling helpless or adrift diminishes a geek's motivation. When a project team is assembled without the requisite technical and management skills, the geeks on the team are the first to notice. They feel helpless and their work will receive little energy.

Paul's presentation ended too soon. His exuberant style and well-rooted competence had by now enthralled everybody in the room. He earned a long applause as he concluded with: **You, too, can lead geeks. Will you try?**

*George D. Meier, PMP*

*Continued from page 2*

## 2004 Strategic Initiatives (What We Will Do)

1. Develop a **volunteer program** management strategy including recognition, recruiting, and resource management.  
(Owner: Glen Fujimoto, VP Operations)
2. Improve logistics, speaker, and value of the **dinner meeting** experience.  
(Owner: Terry Ehrhard, VP Programs)
3. Develop relationships with recruiters and businesses to encourage sharing **employment opportunities** with PMI-OC's membership.  
(Owner: Frank Parth, VP Professional Development)
4. Implement enhanced **financial processes** and procedures to improve accountability.  
(Owner: Gene Dutz, VP Finance)
5. Recommend an appropriate **governance model**, revise the bylaws and other impacted governing documents, and develop an implementation plan.  
(Owner: Kristine Hayes Munson, President)

## Resources:

### People (a.k.a Volunteers) and Money

Each officer charted specific volunteer committees to work towards achieving the strategic initiatives along with maintaining daily chapter operations and executing officer-specific initiatives. An organization chart detailing the 29 committees can be found on page 3. **We need your help!!!** If you are interested in volunteering, please contact any board member or e-mail [volunteer@pmi-oc.org](mailto:volunteer@pmi-oc.org).

The 2003 board approved the 2004 budget at the December board meeting. We decided to budget a \$15,000 draw from the chapter financial reserves in order to fund outside assistance from an accountant, governance consultant, and legal counsel to complete our strategic initiatives. With this draw, the 2004 budget forecasts the chapter will show revenue of approximately \$173,000 with approximately \$173,000 in expenses. If you would like more information about the budget, please contact VP Finance Gene Dutz at [finance@pmi-oc.org](mailto:finance@pmi-oc.org).

## Parting Thoughts

Wow! We have ambitious plans for this year—three goals, six objectives, five initiatives, and 29 committees—designed to benefit you and each individual PMI-OC member. (Remember, it's all about the members!)

I look forward to sharing this journey with each of you throughout the year. **Get involved today! You'll be glad you did.** Contact any officer or e-mail [volunteer@pmi-oc.org](mailto:volunteer@pmi-oc.org).

*Kristine A. Hayes Munson, PMP  
President*



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# Try Your Knowledge on PMP Exam Questions

Answers are on page 12

Here is a sample of some questions:


1. As applied to projects, **temporary** means that:
  - a. Projects are short in duration.
  - b. Every project has a definite beginning and end.
  - c. The undertaking will end at an undetermined time in the future.
  - d. Projects can be cancelled any time.
2. The schedule development technique that provides early and late start and finish dates for each activity is:
  - a. SPC analysis.
  - b. GERT.
  - c. CPM.
  - d. Monte Carlo analysis.
3. All the following are inputs to the initiation process **except** the:
  - a. Product or service description.
  - b. Organization's strategic plan.
  - c. Project selection criteria.
  - d. Project charter.
4. When a process is considered to be in control, it:
  - a. Should not be adjusted.
  - b. May not be changed to provide improvements.
  - c. Shows differences caused by expected events or normal causes.
  - d. Should not be inspected or reworked for any reason.




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# SHORING UP THE OFF-SHORE PROJECT

## A View from the Trenches

There has been a great deal of press lately about the use of off-shore resources for IT development projects. Based upon experiences that I encountered on two recent projects for different clients, there are both benefits and challenges for project managers involved in managing such projects. While my experiences should not be taken to reflect upon all off-shore teams, stories shared with fellow PMs led me to believe that my experiences were not unique. As such, I hope that sharing my observations and “lessons learned” will help other PMs who are embarking on projects using similar resources.

Overall, I found the off-shore staffs to be friendly, intelligent, enthusiastic, and more than willing to put in extra effort when schedules got tight. Both teams were comprised primarily of young, well-educated men, and the personnel costs were low, the key driver for the off-shore trend. English was generally well understood and spoken, although thick accents occasionally led to difficulty in verbal communications. Both teams had good programming skills and, because of the time zone differences, were often able to make code changes “overnight” and have updates available for the U.S. based teams the next morning. However, distance, differences in training and experience, and communications provided challenges in ensuring that these resources were effectively utilized.

**Lesson 1:** If there is a lack of a commonly understood development process, the team leads should identify and agree upon their deliverables early in the project life cycle.

Although both of the off-shore teams with which I was involved claimed to have mature processes, the actual practices fell short. This led to initial confusion within and between the teams as to who was responsible for what. It also led to misunderstandings about what was to be included in each project deliverable. While this problem is not unique, it is compounded when part of the team is a dozen time zones away.

When defining the deliverables, include the completion and acceptance criteria for each. Enforce these criteria – especially early in the project when the teams are learning to work together.

**Lesson 2:** The use of video conferencing tools and shared work spaces, such as electronic whiteboards and co-authoring tools, helps to supplement limited communications.

Weaknesses in processes or project deliverables can sometimes be reduced when open and frequent communication exists between team members. This is difficult when dealing with remote teams. On my projects, the communications tended to be formal conference calls or informal e-mail messages. On the conference calls, many participants were half asleep because they were a dozen time zones away and had already put in a full day of work. The e-mails were often message threads with a day’s delay between responses because of time zone defined work schedules. In neither case was the communication optimal. Once introduced, however, the use of the supplemental communications tools helped make the experiences more interactive and productive.

As a side note, many foreign workers and offices have limited access to high-speed telecommunications. Even if the necessary services are offered in foreign countries, acquiring them can often take months.

**Lesson 3:** Build shared experience at key points in the project. This is preferably done in person.

Getting the team leads together for the initial project meetings was critical. The initial shared understanding of the project’s goals and domain level requirements was more than worth the expense. Team meetings at the end of each development iteration were also extremely beneficial. My meetings included team leads, but not the full team. In retrospect, I would have pushed for a broader audience, even if some had to attend via video or teleconference.

In addition to kick-off and review meetings, I would especially recommend having architects attend the project domain level modeling sessions in person. Off-shore development teams are fine, but architects need to have extensive face-to-face time with analysts and project/problem domain experts. This can not be easily replaced even using supplemental communication tools.

**Lesson 4:** Put an extra emphasis on continuous architectural review and enhancement.

On both of my projects the team’s programming skills were good, but there were few skilled, senior-level architects. After the initial product design, the original architects

often moved on to other projects and left future architecture decisions to less experienced designers on the team. The development teams tended to throw programming resources at problems before considering design impacts. The resulting code had the potential for being poorly designed, brittle, and difficult to maintain. I found that I had to be constantly vigilant against the short-sighted “quickie” solution.

**Lesson 5:** Review your assumptions about “common understandings.”

An issue that arose with the foreign teams was the lack of “shared experience” with their U.S. counterparts. This was much broader than just project/problem domain experience or even general U.S. business process experience. Items which I’ve rarely had to review with U.S. coders had to be addressed in detail with foreign programmers including basic Windows design standards. This “shared experience” gap required much clearer and more detailed documentation for some items which I generally assume to be understood by U.S. coders.

**Lesson 6:** Stay on track by implementing and enforcing an iterative development life cycle. Time-box the efforts to control schedule creep, and keep the iteration durations short.

As with any group of people, I found that subtle differences in understandings of requirements led to different visions of the objective. The geographic separation of my teams increased the difficulty in discovering these differences until they were reflected in code. Introducing an iterative life cycle helped to ensure that products didn’t get too far off target before problems were identified and corrected. This would have been especially beneficial at the beginning of the projects when the teams were just learning how to work together.

**Lesson 7:** Build a schedule including national and regional holidays.

Not only were foreign national holidays different than those in the U.S., but there were regional holidays as well. Some of these lasted weeks and had the potential for severely impacting staff and support resources during those times.

The challenges that I encountered were not unique to foreign development teams, but were exacerbated by time/geographic distance and differences in culture and experience. Generally, these challenges had a basis in communication problems and weak inter- and intra- team processes. The earlier these are considered and addressed in your project, the better the chances for a successful collaboration between local and remote teams.

*Craig D. Wilson*



## News from Headquarters

**PMI plays important role on team studying project management within the United States government.** The Federal Project Management Working Group, a cross-governmental agency team formed in February 2003, is starting to publicly release information on its proposed recommendations to a number of systemic problems seen across the U.S. government. This team was formed to study ways to raise the capability and maturity of project management in the government. The goals are to:

- Create a U. S. government PMO;
- Strengthen strategic planning and governance;
- Establish project management standards;
- Create a project management career path and job series;
- Add project management competencies to Senior Executive Service.

PMI was invited to join the team along with academic and other not-for-profit organizations. **Emory Miller**, Director, Office of Government Policy, General Services Administration, is leading the team. Miller presented the findings at PMI's Corporate Council Partners Meeting on November 7, 2003. Prior to this meeting, Miller had met with **Marty Wagner**, Director, Office of Government Wide Policy; **Mary Mitchell**, Director, Office of Electronic Government and Technology; **Ira Hobbs**, Chair, Chief Information Officer Council-Information Technology Workforce; and the Federal Computer Week-Conference on Program Management. A report of the team's findings is anticipated by end of November. (walter.moore@pmi.org).

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## PMI-OC Library

**New PMI-OC Library Book.** Long-time PMI-OC member **Quentin W. Fleming** donated a copy of his new book *Project Procurement Management: Contracting, Subcontracting, Teaming*. He also donated three copies of this volume for the December dinner meeting raffle. PMI-OC appreciates Quentin's generosity.

The PMI-OC Library is available at each monthly dinner meeting. PMI-OC members may check out the books for one month. Books should be returned at the next dinner meeting.

For more information about the PMI-OC Library, contact **Frank Parth** at [professionaldevelopment@pmi-oc.org](mailto:professionaldevelopment@pmi-oc.org).

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## LESSONS LEARNED

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Experience **IS** the best teacher. Unfortunately, there are several things that I have been taught multiple times and keep forgetting. So experience alone is not enough. Thinking about what you've learned is the key. Regrettably, that is one of those things that I have to keep learning. Recently, I have been forced to rethink the fact that I can't do it all.

### Lesson Learned: You can't do it all.

Taking on more responsibility is what made most of us project managers. We get pleasure from doing a good job and rewarded for doing more. Most workaholics don't start out trying to avoid family and friends. They get satisfaction from the physical and emotional rewards that come from their accomplishments. The more successful you prove to be, the more people are willing to give you the work. There are two pitfalls when you forget that you can't do it all. The first is technical, and the second is saying "no."

### Technical Pitfall

As you make the transition from the technical realm to management, you quickly realize that your technical skills will slip. You can't stay current with technology because you aren't living it any more. You need to be able to speak to it, but others are better at doing it. The difficulty is in letting go. You always have that feeling that you could do it better, faster, and with less headaches. You may even catch yourself starting sentences with phrases like "when I was a coder . . ." or even "when we were saving the world from Y2K . . ."

The technical pitfall may seem harmless; however, ramifications **WILL** emerge.

First, it doesn't give you time to do the important project management activities. If you are writing the conceptual design or trying to add web content, you aren't tracking your project, communicating with your client, or directing your team. This can lead to scope creep, unidentified customer expectations, and total chaos because no one is steering the project. This temptation hits me hardest when things in the management realm aren't going smoothly. I'm sure it is a form of escapism.

The second problem is that your team isn't doing the work. Subconsciously, it tells them that you lack confidence in their ability or allows them to rely on you to carry the load. This struck home when one of my team members came to me with a question on the correct version of a spreadsheet. She had v2.0 and v2.1 in her hand and simply asked if I knew the difference between them. I immediately took them from her and began comparing them. By the time I got to page three, I realized what I was doing. By my actions, I was telling her I could do this faster than she could.

### Just Can't Say "No" Pitfall

I have become good at responding to e-mails at 2:00 a.m., but there are still only so many hours in a day. At some point enough is **too much**. You do have to say no, even to your manager. From a project perspective, it is easy to determine workload by creating a project plan to break the job down, assign resources, and estimate the duration. From this, you can determine if you have enough resources and time to complete the project.

Personally, it is more difficult. "Just one more thing" eventually breaks your back. Task lists are a possible solution. Much like a work breakdown structure, a list can help you grasp everything you are currently committed to and prioritize it. As your manager asks you to add something to your list, evaluate where it fits in priority and timing to determine if it is appropriate for you to say "yes." It is usually better to say "no" than to end up not being able to complete it when expected.

Whether it is the urge to be technical again, or the desire to be the go-to person for everything, you can't do it all. Learn how to let your team support you and how to say "no" by being selective of the tasks to which you say "yes."

**Thomas Cutting**  
*Project Manager, Keane, Inc.*



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<b>Location:</b>	40 Plus of Orange County, 2040 South Santa Cruz, Anaheim, CA 92805, 714-938-0161
<b>Time:</b>	6:00 p.m. – 8:30 p.m. (Registration and pizza start at 6:00 p.m. Program starts at 6:30 p.m.)
<b>Register:</b>	<a href="http://www.pmi-oc.org">www.pmi-oc.org</a> (Pay at the door.)
<b>Questions:</b>	<a href="mailto:professionaldevelopment@pmi-oc.org">professionaldevelopment@pmi-oc.org</a>
<b>Cost:</b>	\$5.00 PMI-OC members / \$10.00 non-members (Covers pizza and soft drinks.)

## Answers to PMP Exam Questions

From page 8

1. **b. Every project has a definite beginning and end.** The end is reached when either the project's objectives have been reached or they are recognized to be unachievable and the project is terminated. [Planning] *PMOK*, paragraph 1.2.1, page 5
2. **c. CPM.** CPM determines the longest path of logic through the project activities. Comparing the difference between early and late starts will determine float or slack. [Planning] *PMBOK*, paragraph 6.4.2.1, page 75
3. **d. Project charter.** The charter is a document that formally authorizes the project. It is an **output** of the Initiation Process. [Initiating] *PMBOK*, paragraph 5.1.3.1, page 54
4. **a. Should not be adjusted.** Processes may be changed only through established change procedures. An adjustment implies an informal change falling outside those procedures. [Controlling] *PMBOK*, paragraph 8.3.2.2, page 103

## PMI SALARY SURVEY

**The PMI Project Management Salary Survey, Third Edition, is now available.**

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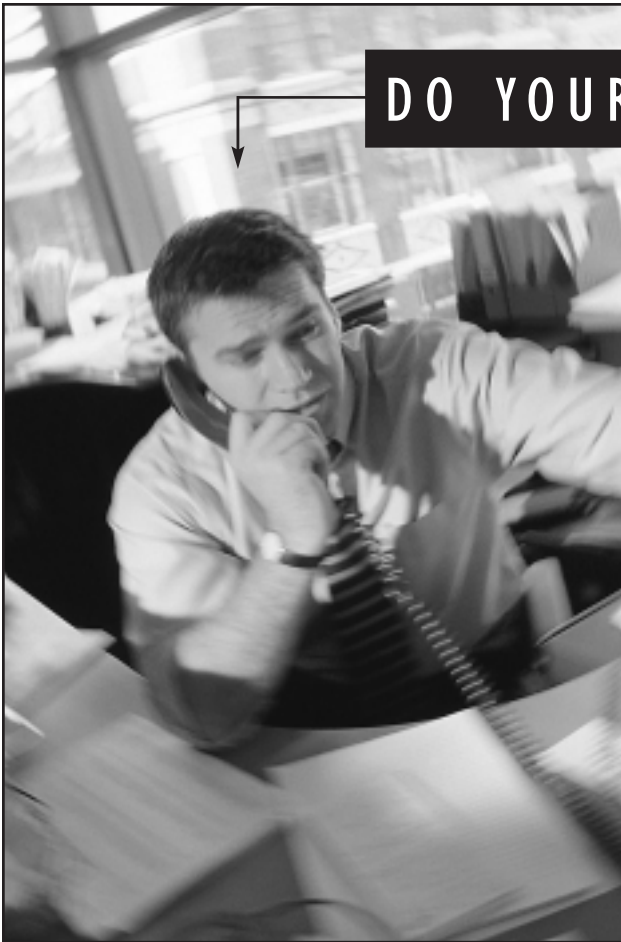
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The full report, which includes cross-tabulations of salary data by 12 key demographic variables on a country-by-country basis, is available in PDF through the PMI® James R. Snyder Center for Project Management Knowledge and Wisdom.

**Order today!** The cost is \$90.00 (U.S.) for PMI members and students and \$135.00 (U.S.) for non-members.

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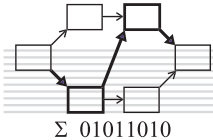
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# PMI-OC DINNER MEETING

**Tuesday, January 13, 2003**

Program: **No-Bull Project Management**

Location: **Wyndham Orange County Airport**  
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 \$40.00  
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Please register at [www.pmi-oc.org](http://www.pmi-oc.org). You can pay via credit card in advance or by cash/check at the door.

Make your reservation by 9:00 p.m., Thursday, January 8, to obtain the "in advance" price. Reservations made after 9:00 p.m., Thursday, January 8, will be charged the "At Door" price.

If you are unable to attend, please cancel your reservation at [www.pmi-oc.org](http://www.pmi-oc.org). Members and non-members who cancel after 9:00 p.m. on Sunday, January 11, 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 MEETINGS

### PMI-South OC Breakfast Club

**Friday, January 16, 2004**

Third Friday of Every Month

Location: **Cocos**  
Lake Forest and I-5

Time: 7:15 - 8:45 a.m.

Register: Send your e-mail reservation to Thomas Sippl at [tsippl@pacificlife.com](mailto:tsippl@pacificlife.com)

Cost: Self-paid breakfast

### PMO-Local Interest Group (LIG) Breakfast Roundtable

**Tuesday, January 20, 2004**

Third Tuesday of Every Month

Location: **Hilton Hotel** (formerly The Red Lion)  
3050 Bristol Street (near Paularino)  
Costa Mesa  
Atrium Café, Lobby Level, 714-540-7000

Time: 7:15 - 8:45 a.m.

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### PMI-Central OC Breakfast Roundtable

**Tuesday, January 27, 2004**

Fourth Tuesday of Every Month

Location: **Hilton Hotel** (formerly The Red Lion)  
3050 Bristol Street (near Paularino)  
Costa Mesa  
Atrium Café, Lobby Level, 714-540-7000

Time: 7:15 - 8:45 a.m.

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Because of these factors, it is difficult to estimate how much lead-time a candidate will require when scheduling an exam at a center. PMI therefore suggests that candidates allow six weeks in advance to schedule an exam. This should ensure that the candidate secures his or her preferred testing date, while also leaving adequate time for final study preparations.

We are sharing this information with you to help you manage exam expectations and to ensure that the same message is being communicated by PMI leaders and staff.  
**[laurie.cooke@pmi.org](mailto:laurie.cooke@pmi.org)**

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Find your ideal project management job or find an experienced resource for your organization. For more information, contact the **Career Center** at [careers@pmi-oc.org](mailto:careers@pmi-oc.org).

### E-MAIL BLAST

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### PMI-OC WEBSITE

Visit our website at **[www.pmi-oc.org](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.

## PMI Orange County MILESTONES

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

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## COMING EVENTS

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### **JANUARY 13 DINNER MEETING**

No-Bull Project Management  
Speaker: David A. Po-Chedley  
Vendor Showcase: Compuware Corporation

### **JANUARY 16 BREAKFAST MEETING**

South Orange County Breakfast Club  
See page 15

### **JANUARY 20 BREAKFAST MEETING**

PMO-Local Interest Group (LIG) Breakfast Roundtable  
See page 15

### **JANUARY 27 BREAKFAST MEETING**

Central Orange County Breakfast Roundtable  
See page 15

### **FEBRUARY 10 DINNER MEETING**

How Your Company Can Achieve CMM Level 5  
Speaker: Jim Cisneros  
Vendor Showcase: SCOPEiT

### **MARCH 22-25 PROJECT WORLD LA**

Los Angeles, California

### **APRIL 27-28 2004 ISA AUTOMATION WEST**

Long Beach, California

### **OCTOBER 21-23 2004 PMI LEADERSHIP MEETING**

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For details and registration information on all events for PMI-OC, see [www.pmi-oc.org](http://www.pmi-oc.org).



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