PMI ORANGE COUNTY MILESTONES

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PMI-OC VISION

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

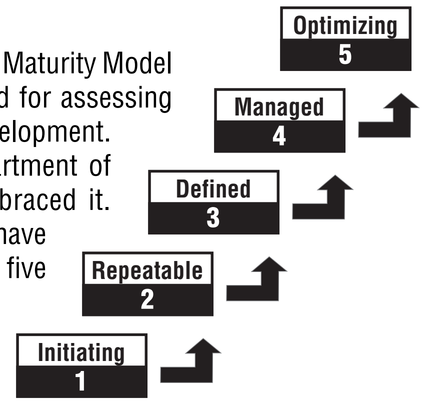
PMI-OC MISSION

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

February 10th PMI-OC Dinner Meeting

Our Journey to CMM Level 5

By Jim Cisneros



The Software Engineering Institute's Capability Maturity Model (SEI-CMM) has become the de-facto standard for assessing an organization's capabilities in software development. While it was initially developed for the Department of Defense, many in private industry have embraced it. Thousands of companies around the world have been assessed and are certified at one of its five levels. However, the top rating of "Level 5" has been achieved by fewer than 100 companies worldwide, and by only 12 in the United States.

- What would drive a small, young, Orange County based firm to pursue this difficult goal?
- How did they go about it, and how long did it take?
- What worked well, and what didn't?
- What benefits have they seen since they were certified?
- What can they take away from their experiences?

Learn the answers to these questions and more!

Jim Cisneros has overall responsibility for all application development and support activities for ITresources' clients. Major clients include Isuzu Motors America, their North American affiliates and subsidiaries, Newport Corporation, Asics Tiger, Mitsubishi Motors North America, Edwards Lifesciences and American Honda Motor Company. Jim has provided the strategic direction for systems development, including the initiative for ITresources' Systems Development Methodology to become certified by the Capability Maturity Model.

He previously held information technology management positions at Sears Roebuck and Nissan North America and was responsible for sales and distribution, marketing, manufacturing, retail, and financial systems. He has twenty-five years of experience, and has led several mission critical system development efforts, participated in the development of strategic technology plans and in the re-engineering of information technology organizational functions.

Vendor Showcase: SCOPE iT
www.scopeit.com
See ad on page 3

INSIDE THIS ISSUE

November and December, 2003

NEW PROJECT MANAGEMENT PROFESSIONALS

Chean Fong	**Marilynne Sims**
Elaine Larsh	**Michael Thomas**
Matt Holt	**Yoram Neumark**
Joy Gumz	**Gregory Cimmarrusti**
Michael Dowell	**James Bennett**
Thorsten Huhn	**Paul Leyva**
Raveesh Hampapur	**Debra Squicciarini**
Michele Farmer	**Roger Lang**
Daniel Berg	**Jennifer Lowe**
Yvonne Kwan	**Total New PMPs 21**
Vicke Spencer	**Total PMPs 421**

NEW MEMBERS

Sanjeev Kumar
SEI Information Technology
Leonardo Rodriguez
Artemis International Solutions
Edward Hermelin
Charlie Gorlinsk
Lauren Kelly
Maryam Madjid
Unisys
Donald Couch
Luanne Diehl
Lawson Software
Ross French
Cap Gemini Ernst & Young
Keith Lennox
Web Safe Security
Blake McCoach
ByNet Software
Heather Nguyen
GCAP Services
Steven Allen
Michelle Combe
Fiberlink Communications
Yvonne Kwan
Valerie Mauro
Triversity
William Mullan
Deloitte
Catherine Vu
FileNET Corp.
Shirley Huffman
Option One Mortgage Corp.
Franco Colantonio
Unisys
John Davis
College Loan Corp.
Annice Jackson
Unisys
Douglas McRae
JP Morgan Chase
Michael Cafferty
Option One Mortgage
Dick Norris
SKA Consulting, Inc.
Stephen Crabtree
Computer Associates, Inc.
Tom Lightfoot
Medtronic, Inc.
Andrew Nagata
CKE Restaurants, Inc,
Piron Vossoughi
AAI ACL Technologies
Vicki Desler
Prescription Solutions

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THE PRESIDENT'S COLUMN

Quick Wins!

The 2004 PMI-OC Board of Directors invested many hours prior to taking office planning for our term so we could hit the ground running. Running is an understatement. Board members are actively working on multiple initiatives as seen by the many quick January wins. The most significant January quick wins address the board's key strategic initiative to implement enhanced financial processes and procedures to improve accountability.

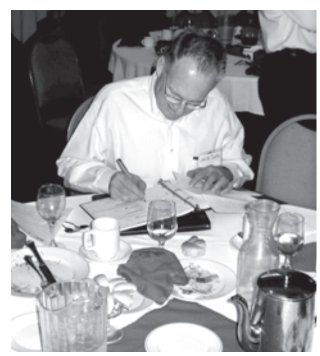
Segregation of Duties.

2004 VP Finance **Gene Dutz**, working with 2003 VP Finance **Stephen June**, established process and procedures to segregate PMI-OC financial activities into four major areas:

• **Authorization.** Board members must now authorize expenditures based on the approved budget by linking expenditures to a specific line item in the budget. Previously board members merely tied expenditures to a general category in the approved budget. A redesigned expense form will ensure this enhanced procedure is followed.

• **Safekeeping of Assets.** Strict cash control processes have been introduced to protect the chapter's financial assets. Part of these processes involves establishing the position of Assistant Treasurer. The Assistant Treasurer is responsible for collecting all chapter revenues and accounts receivable, focusing especially on event registration fees and advertising fees. The Assistant Treasurer, or someone he designates, will be at all functions where revenue is anticipated. In addition, the Assistant Treasurer will be responsible for promptly depositing the revenue into the chapter's bank accounts. Stephen June has agreed to serve as the 2004 Assistant Treasurer. Previously the VP Finance performed this duty in conjunction with the expenditure control and record keeping duties.

• **Expenditure of Funds.** Only the VP Finance (or the VP Operations serving as a back-up) is authorized to pay invoices on behalf of the chapter. This creates a level of segregation of duties that is in keeping with generally accepted accounting principles since the individual assigned the duties of receiving cash will no longer be able to spend cash or have access to the chapter books or record.



*2004 VP Finance **Gene Dutz** writes checks at the January dinner meeting.*

• **Record Keeping.** Enhanced record keeping procedures have been implemented to ensure accurate financial records of all revenues and expenses. VP Finance Gene Dutz will maintain the official chapter books and ensure that a board member authorizes all chapter expenditures. He will also provide monthly financial reports to the board tracking cash flow, net income, and budgetary adherence. In addition, the VP Finance will be researching ways to separate the bookkeeping functions from the expenditure of funds responsibilities, further improving segregation of duties.

New Record Keeping System

Chapter financial records have been transitioned from our former accounting software package and are now being maintained using Intuit's QuickBooks. QuickBooks employs double-entry accounting, mandatory journal entries, and a permanent audit trail of all transactions. Financial reports at the January board meeting were generated using QuickBooks.

Professional Accounting Services

PMI-OC retained the accounting firm Richard A. Blithe, Certified Public Accountant, A Professional Corporation, of Woodland Hills, CA. Lou Kalof, the accountant working directly with PMI-OC, reviewed the chapter's financial records and financial controls. Kalof recommended many of the procedural changes to support segregation of financial duties.

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Volunteer of the Month

Melanie McCarthy Honored as Volunteer of the Month for January

__Melanie McCarthy__ (left), PMI-OC Chapter's January Volunteer of the Month with VP Operations __Glen Fujimoto.__

A resolution was unanimously passed at the December 2003 board meeting of your chapter designating **Melanie McCarthy** as **Volunteer of the Month for January 2004**. VP Operations **Glen Fujimoto** honored Melanie at our January 13, 2004 general meeting by presenting her with a Certificate of Appreciation.

Melanie attended her first PMI meeting back in 1995, but never joined because she was heavily involved two other stellar organizations, Association of Information Technology Professionals (AITP) and the Southern California Quality Assurance Association (SCQAA). Our chapter is fortunate that she decided to join PMI this month. With tongue-in-cheek she said, *"So far, it's the only New Year's resolution I've stuck to!"*

Melanie is recognized for her outstanding contributions to PMI-OC's Career Networking Forum, initiated in May 2003 as a monthly program. The Career Networking Forum assists PMI members in career transition in undertaking effective job searches. Together with **Rod Hendrixson**, a former VOM honoree, and several other dedicated team members, she formulated insightful programs that deal with various aspects of finding work. Melanie brings valuable experience to PMI after volunteering for three years at 40 Plus of Orange County, a non-profit career transition center for senior executives. In addition to serving on the board of governors for that organization, she is an instructor in the art of networking and development of stand-out resumes that support one's job search strategy. Leveraging from her experience from 40 Plus, she has been instrumental in arranging knowledgeable speakers and conducting innovative sessions that take one's job search to the next level.

A highlight of the Career Networking Forum is the Karma Club. Melanie leads the group in highly interactive exercises in lead generation and networking by capitalizing on the collective knowledge of fellow members. Exercises include developing a 30-second commercial to introduce yourself to the group, informing participants about your background and what kind of job you are looking for. Members then collectively assist you by passing on leads, personal contacts and company information pertinent to your job search. Melanie's goal is to have participants leave with a fist full of names and numbers that could help them land new positions. As she succinctly puts it, *"It's all about networking, networking, networking."*

Melanie has provided IT resource contacts to companies in Orange County for 15 years. She established her staffing business three years ago. She points out that the skills she uses to identify openings for consultants are no different from the methods that active job seekers should use in their quest for employment. As a headhunter, she knows the resume format that hiring managers respond to. She willingly shares these insights and techniques that empower job seekers to get back to work, as well as setting up informational interviews.

Melanie wishes to remind you that the Career Networking Forum meets on the *third Wednesday of every month.* Come and join us to experience first hand why Melanie is a worthy recipient of this award. Congratulations once more to Melanie!

Dave Jacob

Membership Accomplishments in 2003

- Surpassed the 1,000 member mark
- In the top 15% of the largest U.S. chapters
- In the top 10% of worldwide chapters
- Surpassed the 300 PMP mark
- Finalized privacy policies that will safeguard sensitive member data
- Changes in dinner meeting format to improve new attendee experience and improve networking abilities
- Improved collaboration with Corporate Development to increase public awareness of the Orange County Chapter
- New marketing tools deployed to increase awareness of Orange County Chapter
- Continued work to encourage member volunteer efforts

NO BULL
PROJECT MANAGEMENT

• Build Relationships
• Communicate
• Increase Your Sphere of Influence

With his **NO BULL! PROJECT MANAGEMENT** presentation, **Dave Po-Chedley** shared with his audience six success factors that he found should not be missing from any project. His mission was simple enough: to get some of the all-too-common bull out of projects. In his view, the biggest challenges in making any project successful are people issues, such as attitudes, motivations, sponsorships (or their lack), private agendas, and ignorance.

He never wavered from his focus on the practical. "It doesn't matter what project managers know, but only what they can do with what they know, what they remember and what they can deploy by the deadline."

Dave's presentation style was very refreshing. Inserted in between his statements of wisdom came little quizzes and exercises. The answers appear on page 8.

To wit, here's one exercise Dave asked his audience to do. "For the next ten seconds name the ten human body parts that have only three letters." Eye, ear, leg come to mind readily, but what about the other seven?

"Sorry, time is up!"

Of course, we all know the seven other three-lettered body parts. We use them every day. Yet, most of us, me included, failed to name them in a timely fashion. Dave's point is clear; it doesn't matter how many things we know if we can't deliver them on time.

Let's turn now to Dave's success factors in detail.

1. Position your project as a strategic investment. The term "strategic investment" refers to a company's executive perspective. If a project is seen as such, it will get support. It will likely get support even in the face of competing requests for resources. Communication between the project manager and the executive suite is key. The project must be kept visible. It would seem that telling the executive about the project occasionally would suffice. Not so! Remember Jack Welch:

"To get your message across, you must repeat it over and over and over until you are sick of it. And then you must repeat it some more."

Communicating a message to executives once does not mean that they will remember it. Yet it is crucial that they do remember. In so doing, connect your project to your organization's goals, orient it for customer satisfaction, and tune it to the bottom line.

You gain visibility for your project by communicating the right message about the right events to the right people. Ask the recipients how they prefer to receive communications from you, what level of detail, in what form or by what means, and how often.

2. Define success and get out of the way.
- *Hired for technical skills,*
- *Fired for lack of people skills,*
- *Promoted for leadership skills.*

To be effective, project managers need to lead more and manage less. How, then, do you position yourself as an effective leader? Start by understanding the difference between influence and authority. It is rare indeed, when a project manager has full control over a project. There are always outsiders who also affect the project's direction.

Dave drew the analogy of managing the project team as managing content suppliers and customers. Some of a project's stakeholders produce outputs that others use as inputs. In a way, Dave sees himself as president of My Own Desk, Inc.

Continued on page 5

Dave Po-Chedley's
Success Factors

1. ***Position your project as a strategic investment.***
2. ***Define success and get out of the way.***
3. ***Make it easy to do business with you.***
4. ***Practice No Bull communications.***
5. ***Promote ideas and reward results.***
6. ***Have fun and get a lot done.***

***Terry Ehrhard**, VP Programs, with speaker **David Po-Chedley** (left) at the January dinner meeting.*

No Bull Project Management *Continued from page 4*

It makes only good sense; the essence of all power is getting others to participate, is evoking the sponsorship of executives. But be mindful. Executives don't have a lot of time to give you. Be brief and to the point. Better yet, communicate your ideas in a way that they become the executives. "They are much less likely to drill a hole in the bottom of the boat, if they are sitting in it," admonishes Dave.

Furthermore, be mindful of the 80/20 rule. 20 percent of a project manager's activities are typically useless. They achieve nothing. They may well be required, yet add no value. Examples are forms, policies, protocol, and government-mandated procedures. Seek to minimize the effort spent on these. It's much better to spend your efforts on being a facilitator (rather than a micromanager) and on defining outcome, measures, and constraints. Most important: maximize your involvement and ownership.

3. Make it easy to do business with you. Here's another one of Dave's quizzes. Consider the following two sequences and determine the missing ones at the end:

2, 3, 6, 7, 14, 15, __, __, __.

A, E, F, H, I, K, L, __, __, __.

Dave gave us about a minute to figure out the answer. Most people got the three missing elements of one sequence right. However, the other baffled many.

Dave's point here is the continuation of his main theme: communicate clearly, and don't assume that what was the correct interpretation of one situation will also work elsewhere. Instead, be open, and responsive.

Next, Dave related his experience with a prominent executive who had become known for sinking projects. Whenever she heard about a project from somebody other than the project manager, especially if she heard bad news from that other person first, the project was cancelled. Eliminate unnecessary irritations, be available, and above all, simplify, simplify, simplify.

4. Practice *No Bull* communications. Every project has its own culture. You, the project manager, create its culture. In Dave's view, this culture is about creating or draining energy. As you solve problems, you can either create or drain energy. You can either engage in finger pointing, or in getting together to work things out.

At this point, Dave showed the cartoon in Figure 1.

Most commonly we see management attempting to solve the problem by adding more managers, shown in Figure 2.

Wouldn't it make more sense to choose the solution of Figure 3?

5. Promote ideas and reward results. Your role as the project manager is to create an environment where politics don't create a problem. Be sensitive to politics, but don't get sucked in. Create yourself a political cover by consulting and clarifying your project's objectives and by relating them to the company's business objectives.

Foster informality. Formal organizations tend to foster politics, whereas informal ones tend to foster ideas. Encourage creative conflict. Seek the ideas and input from others. Discuss them and allow for critical evaluations. It's a matter of what's right as opposed to who's right.

Make things happen for those who make things happen for you. Successful project managers do things that create energy in their projects so that the people find fulfillment. Dave quoted a study on the reasons why people leave their jobs. There are three main ones, in order of decreasing importance:

1. More recognition
2. Greater challenge and potential for achievement
3. More money

So it's not necessarily money that people crave, but recognition for a job well done. Run your project by *"People who make good things happen, have good things happen to them."* Recognize achievements.

6. Have fun and get a lot done. Celebrate your team's achievements. Create relationships, and nurture informal opportunities for people to get to know each other. People who like each other work better together and help each other. Use such inexpensive venues as happy hours, breakfasts with executives, and company-sponsored team events.

In this way, you can gradually build more control from the inside out. Soon, you can get away with "ask for permission, not for forgiveness" and increase your sphere of influence as a project manager.

George D. Meier, PMP

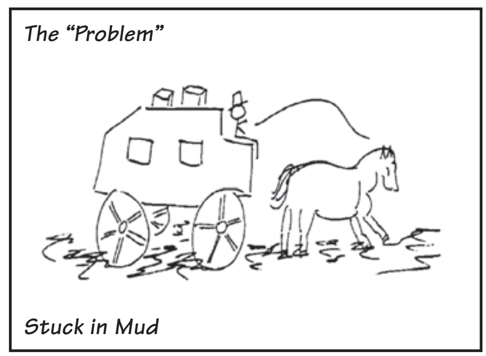

Figure 1: *Problem: insufficient resources. The wagon is too heavy for one horse.*

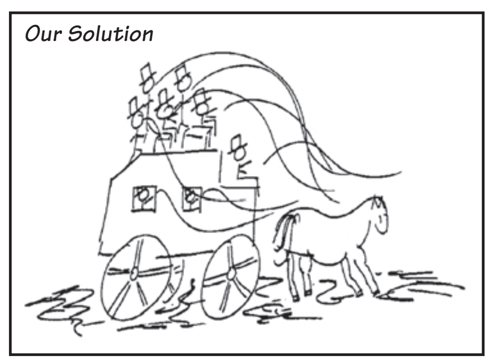

Figure 2: *Solution: management adds more drivers.*

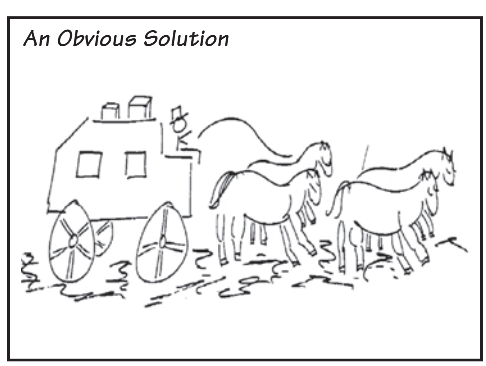

Figure 3: *Only too obvious: add the resources that matter.*

PMP Exam Questions

Answers are on page 13

Test your knowledge on these sample PMP® questions:

1. The project charter should be issued by:
   a. The project manager.
   b. The individual in charge of strategic planning.
   c. The functional manager supplying the most resources to the project.
   d. A manager external to the project, who is at a level appropriate to the needs of the project.
2. Corrective action is an output in many processes in the *PMBOK® Guide*. In executing processes, corrective active is often an input, because executing processes:
   a. Typically follow control processes.
   b. Involve setting the performance measurement baseline for the project.
   c. Are concerned with bringing expected future performance in line with the project plan.
   d. Involve measuring performance to detect variances from the plan.
3. The purpose of the contract administration process is to:
   a. Award a contract.
   b. Ensure the seller's performance meets requirements.
   c. Process seller invoices in a timely manner.
   d. Establish and maintain a change control system.
4. At some point in time on your project, you have done $3,000 worth of work. The value of the planned expenditure at that point is $2,000. The Schedule Performance Index (SPI) is:
   a. 0.667
   b. $1,000
   c. -$1,000
   d. 1.50

Career Networking Evening

Melanie McCarthy introduces speaker, Alice Reuter.

PMI-OC Career Networking Event kickoff meeting for the new year was January 21, 2004. Our speaker, **Alice Reuter**, comes from a twenty-five year corporate background as VP Finance with a CPA and MBA. After experiencing out-placement services that did not address job transition for management and executive personnel, Ms. Reuter and associates founded, *Back to Work Connection* (www.back2work.biz). Their "mission is to fully support you in mastering skills you need to get the job you want." Ms. Reuter coaches individuals and facilitates job search workshops at Chapman University extension in Irvine.

With a perspective from both the employer and job search sides, Ms. Reuter began the evening noting the importance of a job search framed by **positive thinking.** We all have the capability to affect outcomes with positive thoughts. While there are areas we cannot always control, positive thinking should be central to job search efforts. The presentation handout provided ten positive traits:

Audience learning new job search techniques.

1. Optimism
2. Enthusiasm
3. Belief
4. Integrity
5. Courage
6. Confidence
7. Determination
8. Patience
9. Calmness
10. Focus

"Don't sit in front of your PC screen scrolling through job boards," Ms. Reuter advises. "The probability of garnering your next position or an interview that way is low." It is important to "get out and network." So take that positive thinking and positive attitude into the **networking** arena. Networking broadens your contact base and brings opportunities to hone your self-selling techniques. However, the cardinal rule in networking is relationship building. Networking is not simply asking for something to further yourself for the immediate job situation, but to foster ongoing support, visibility, and professional growth.

Having primed the audience with positive thinking and networking basics, Ms. Reuter emphasized that "Ace the Interview" strategies begin with developing your **success stories**. The purpose is to **showcase** your skill sets with rehearsed stories that demonstrate your capabilities in a variety of situations. *Back to Work Connection* helps clients develop logical, concise success stories using a format called SHARP: situation, hindrances, actions, results, positive evaluation.

Situation:	Describe the situation in which you were operating.
Hindrances:	Describe any constraints or hindrances on your actions.
Actions:	Explain exactly what you did.
Results:	Describe the results that can be attributed to your actions.
Positive:	Summarize the example with a positive evaluation of your skill.

Ms. Reuter suggested having twenty success stories available in your interview arsenal. It's not necessary to memorize the stories, but simply to rehearse them as a method of showcasing your unique experiences and capabilities and demonstrating how they will meet challenges for the interviewing company.

Additional **interview preparation tips** included sample questions you might expect:

1. *"Give me an example of a problem you faced on the job and how you solved it."*
2. *"Give me an example of a time when you had to go beyond the call of duty to get the job done."*
3. *"If I asked your last boss what kind of employee you were, what would he/she say?"*
4. "*To date what has been your biggest success?"*

Melanie McCarthy with Alice Reuter (right).

5. *"Why should I hire you over all other candidates I am interviewing?"*

   Each one of these is an opportunity to talk about your success stories.

Ms. Reuter explained the importance of researching a company prior to your interview and having prepared questions to ask the interviewer concerning the company, company culture, possible challenges in the position, department goals, and major concerns that need to be immediately addressed.

On **asking interviewer questions**, bottom line is:

a. What the job is like.
b. What the company is looking for in a candidate.
c. How you will fit in.
d. What is going on at the company.

On **fielding questions**, here's what you may expect:

1. Why have you been out so long?
   a. Partly a consequence of the economy and/or industry.
   b. Restructuring and re-engineering.
      - During this time I've taken a course.
      - Demonstrated initiative by mentoring others.
      - Networked in professional organizations.
      - Kept my pulse on industry changes.
2. What is your weakness?

   Frame your weakness in a positive manner. Example: "I have high standards and a determination to reach goals. Yet, I realize it's necessary to be tolerant with others in facilitating efforts to meet deadlines. I'm mentoring and improving standards within my group."
3. Concerned about "thinking on your feet?"

   Believe in what you can do instead of focusing on what you think you cannot do. Interview preparation is vital. Remember to have success stories. It is acceptable to ask an interviewer to repeat the question or rephrase it. Use the idea that taking time to respond demonstrates an analytical, thorough manner, making sound decisions based on facts and research.

Interview Recap:

1. Prepare, prepare, prepare.
2. Always think and conduct yourself as if you're going to get the job.
3. Present a relaxed and confident manner.
4. Ask interviewer what is the next step in the hiring process.
5. Ask for the job. Let them know your interest level and confidence in your abilities.

Continued on page 8

Ace the Interview

Continued from page 7

6. *New idea:* Keep in touch with someone you interviewed with previously
7. Consider setting up informational interviews.

At the conclusion of the Q & A session, Ms. Reuter generously presented two gift certificates for one-hour individual coaching sessions with *Back Two Work Connections*. **Sridhar Mahadevan** and **Gwen Naylor** were the lucky winners whose business cards were drawn.

Gretchen M. Staff

*Gift certificate winners, **Sridhar Mahadevan** (left) and **Gwen Naylor** (right).*

Answers to Quizzes

in Dave Po-Chedley's No Bull Project Management presentation

From pages 4 and 5

1. The ten body parts with only three letters are: **eye, ear, leg, toe, hip, lip, rib, arm, gum, jaw.**
2. The missing elements in the two sequences are:

   2, 3, 6, 7, 14, 15, **30, 31, 62.**
   A, E, F, H, I, K, L, **M, N, T.**

The key for the first sequence is an algorithm. Start with the first number, add one and assign the result to the second number, double the second number and assign the result to the third number. Repeat this process for the fourth number; i.e., add one to six and obtain seven; double seven and obtain 14; add one and obtain 15; double 15 and obtain 30, add one and obtain 31; double that and obtain 62.

The key for the second sequence is very different. It has nothing to do with an algorithm, but with the shape of the letters. Note that they are all alphabetic characters composed of straight-line segments. The characters with these properties that come after L are M, N, and T.

Dave's point here is that most people who figure out the answer to one sequence try to use the same approach for the other answer. "Be flexible and remain receptive to other ideas."

The Two Faces of Risk Management

Welcome to 2004! In many languages the month January is named after Janus, the two-faced Roman god of doorways, and the start of a new year is traditionally a time for review, looking back at the past 12 months and looking forward to the next.

There is also a widespread custom of making "new year resolutions" to change something in the year ahead. Unfortunately, these resolutions usually last only a few weeks before old habits reassert themselves!

Risk management is about looking forward, scanning the uncertain and unclear future in an attempt to discern what awaits us. It offers businesses, projects and individuals a "forward-looking radar," identifying threats to be avoided and opportunities which might be captured. Even though the precise details of such uncertainties may remain unclear, the "risk radar" can make us aware of their location and size, helping us to formulate appropriate action plans in advance.

But what about the other direction, the "rear-view mirror?" Does the past have any relevance to risk management?

Strictly speaking, there is no risk in the past, since it has already occurred (although we may remain uncertain about what actually happened and what it means!). But George Santayana said "Those who cannot remember the past are condemned to repeat it." So we must review the past in order to learn for the future. For risk management, this means addressing the following questions.

- What types of risk can be identified on my project or business? Are there any generic risks that might affect similar projects?
- Which identified risks actually occurred, and why? This includes problems that could have been foreseen as threats and missed opportunities that could have been captured.
- What preventive actions could have been taken to minimize or avoid threats? What proactive actions could have been taken to maximize or exploit opportunities?
- Which identified risks did not occur, and why? Which responses were effective in managing risks, and which were ineffective?
- How much effort was spent on the risk process, both to execute the process and to implement responses?
- Can any specific benefits be attributed to the risk process, e.g., reduced project duration or cost, increased business benefits or client satisfaction, etc.?

The results from this type of lessons-learned exercise can be used to update risk identification tools such as checklists, to incorporate preventive risk response strategies into future projects, and to improve the effectiveness of risk management. It might also be possible to estimate return on investment (ROI) for the risk process by comparing specifically attributable benefits with process costs.

If we do not learn lessons from our past, we will repeat it. People often say "This risk affects all our projects, and it usually happens!" For a risk to happen once is *understandable*, since uncertain events can occur even on the best-managed projects. If the same risk occurs twice, that is *unfortunate*, because the chances should be less than the first time. But for the same risk to happen a third time is *unacceptable*, as it exposes a lack of learning from the past.

So as we stand on the threshold of the new year, we should look back, as well as forward. Of course, we must focus on the challenges ahead and use the risk process to help us move forward safely toward our objectives. But we must also remember our past, learn the lessons from our journey to this point, and not repeat the same mistakes. Happy New Year!

Dr. David Hillson, PMP, FAPM
david@risk-doctor.com

To provide feedback on this article, or for more details on how to develop effective risk management, contact the Risk Doctor, ***info@risk-doctor.com***, or visit the Risk Doctor website, ***www.risk-doctor.com***.

President's Column

Continued from page 2

She also oversaw the QuickBooks migration. In a recent telephone interview with me, she reported that PMI-OC's previous financial system was generally sound, and we were on the right track to implement more rigorous controls. Kalof will be further assisting the chapter by helping us develop reports to analyze financial trends and by preparing our taxes.

It's Your Money

The PMI-OC Board understands that the funds we manage are yours. Ultimately, we are accountable to you and every other PMI-OC member for our financial actions. The board will be preparing our first annual report to report our financial position at the end of 2003. This report should be available in March 2004. If at any time you wish more information about the chapter's financial position, e-mail Gene Dutz or me.

Kristine A. Hayes Munson, PMP
President

Book Review

IT Systems Management

Reviewed by ***Louis G. Macri***
IT Project Management Consultant and
IT Professional for Over 40 Years

Overall, the book was well organized and easy to read and follow. The history section presented an excellent introduction to the IT systems profession and identified the major events that shaped the development of the profession.

The book gives the reader an overview of the IT profession. It touches on many critical aspects and makes the reader aware of the variety of disciplines necessary to be successful in the field. Although the book presents many very specific examples and checklists, the reader must be aware that the information presented is general and that every organization has its own unique organizational infrastructure. Taking the concepts in the book and incorporating them within the organizational infrastructure becomes the challenge for the reader.

The twelve disciplines presented in the book effectively represent the challenges facing the IT professional. Each one of the disciplines will require in-depth study and training before the IT professional can master the specific discipline.

In my opinion, the book can be used as an introduction to an IT systems management program. It has sufficient material to stimulate the student's thought processes and provide an excellent starting point for an IT professional, a non-IT management person or a power user.

New Programs

New Efforts from Our VP of Professional Development

Professional Development will be starting two new efforts for our members. The first is a mentoring program where our experienced members can meet with and offer advice to our less experienced members. We already have two members who have volunteered to set it up, so we're looking for people who either want to mentor or would like some mentoring.

The second effort will be a seminar on getting published. Many of you have picked up some really good ideas on how to do project management and want to publish what you've learned. We will be hosting a seminar to bring together our highly published members with those who are interested in getting articles and books published.

For further details please e-mail me at professionaldevelopment@pmi-oc.org.

Frank Parth, PMP
VP Professional Development

PMP Prep Course Survey

Executive Summary

- Three out of four people who participated in the survey below were either in, or wish they had been in, a PMP Exam Prep Study Group.
- Study groups should be promoted by the PMP Exam Prep Study Group Project Manager.
- Students from the class are recommended to serve as study group facilitators,
- Study groups should meet consistently at the same business location where study group activities are performed.
- Agendas should be formed to review topics of concern from the previous class and chapter.
- Invite PMPs to attend, to speak and to answer questions.
- Facilitate group participation; respect and encourage each other.

Thanks to all who participated. If you would like the full report, please contact:

Damon C. Perry, PMP
310-732-1170
perryecn@yahoo.com

Matrix Territory

Matrix management hasn't gotten much attention lately, but it's more important than ever. Almost all project managers must work in a matrix, whether or not their organizations are formally structured as one. Why? Because almost all projects cross functional boundaries; team members, customers and stakeholders all come from or reside in different functional areas. And, as soon as you cross functional boundaries, you are in **Matrix Territory**. How well prepared are you to survive in this difficult terrain? Do you have the supplies you need?

Do you have the supplies you need to survive?

In Matrix Territory, leaders must lead without authority. Work gets done outside the realm of the boss and subordinate relationship, a relationship that depends on authority to get things done. In Matrix Territory, there is no control over others. There is only control of oneself. There is no power over others, only the opportunity to empower.

So how does one accomplish anything in this strange and foreign land? By creating commitment and accountability for the work. And how does one do that? One does that, whether or not one has authority, through participation. When team members participate in planning, monitoring and controlling processes, they create more ideas and better, more realistic plans. They achieve a greater understanding of the big picture as well as the interdependencies between individual tasks, and as a result, are committed to the end goal. When a leader allows a team to truly participate, the team assumes ownership of the project. The problems that arise are their problems, and so they work hard to solve them.

If the team is doing the planning and monitoring of the project, and if the members own the outcomes of the project, what is the new role of the project leader in Matrix Territory? A few of the key functions include:

1. **Facilitator.** The project leader facilitates the project management process, leading the team through the steps of creating and implementing a plan. She facilitates the team process, leading the team through the stages of forming, storming, norming, performing and mourning.
2. **Ambassador.** The leader is the primary ambassador to the world outside the project team. She is the liaison to the project customer and sponsor. She is also an ambassador to other stakeholders, such as resource managers. As an ambassador, her listening skills are as important as her negotiating skills.
3. **Salesperson.** It's important that the project leader sell the project in its initial stages,. and if commitment and enthusiasm wane, she must continue to sell the project to the outside world, assuming it makes sense to continue. If the project is no longer viable, the project leader becomes the salesperson for shutting it down.
4. **Cheerleader.** Just as outside commitment and enthusiasm can ebb and flow over the life of a project, so can the spirits of the project team if not properly supported and cheered on. Cheerleading means finding what's going right and focusing on the positive. It means recognizing individual and team accomplishments. It means celebrating successes and learning from losses.
5. **Meeting Leader.** The project leader needs to *design* the meetings so they will be effective and efficient, achieve the results desired, and take as little time as possible. When the meeting is over, he needs to gather feedback in order to continually improve the way his meetings are run.
6. **Team Builder.** A strong team, focused on a common goal, can accomplish just about anything. It's the project leader's role to build the team.

In Matrix Territory, the roles that are most important are those that address organizational and people issues. All of the roles require good communication skills. We spend an awful lot of time improving our technical skills. but not enough time improving the softer skills, the skills that make the difference for most projects. So, as you venture into Matrix Territory with your next project, make sure your wagon is full of the kinds of skills and tools that will help you and your project survive. You don't want to get stuck at Donner Pass.

Paula K. Martin

Paula Martin is the CEO of Martin Training Associates, a management training and consulting firm. Paula's talk on matrix management, *Caught in the Cross-Hairs*, was taped by the LI PMI Chapter and can be viewed at www.iteampro.com.

For more information on matrix management, visit: www.appliedmatrixmanagement.com.

Breakfast Meeting Minutes

Tom Sippl moderated the March meeting of Orange County PMI's **Program Management Office Local Interest Group** meeting at the usual location at the usual time of 7:15 a.m., the third Tuesday morning of the month. Several new visitors joined some of the regular attendees, and several companies with over 1000 employees were represented.

Some of the topics included:

- Deploying methodologies;
- How to integrate the project management process with the software development or product development life cycle processes;
- Managing projects with offshore resources;
- Adding portfolio management tools like ProSite and ChangePoint to project management tools;
- Should the PMO organizational structure be within or outside of IT;
- Recovering broken projects;
- Hidden PMOs and others.

Tom set development of a comprehensive list of topics and issues that are within the scope of the PMO Creation and Operations as a future meetings goal for the group.

The basis will be the five domain areas put forward by the early curriculum of the PMO Certificate of Additional Qualification (now under revision) and the chapter titles/headings/subjects of eight to ten books written about PMOs, many of which were recommended reading for the CAQ exam. That being a start, additional topics and issues will be added and weighed for interest by attendees of future meetings.

If you are interested in the initiation and operations of PMOs, join us for our next meeting. Register at www.pmi-oc.org or contact Tom Sippl at tsippl@pacificlife.com or 949-219-7798.

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Answers to PMP Exam Questions

From page 6

1. d. A manager external to the project, who is at a level appropriate to the needs of the project.
[Initiating] *PMBOK*, paragraph 5.1.3.1, page 54. The charter is a document that formally authorizes the project. It is an **output** of the Initiation Process.

2. c. Are concerned with bringing expected future performance in line with the project plan.
[Executing] *PMBOK*, paragraph 4.2.1.5, page 46.

3. b. Ensure the seller's performance meets requirements.
[Executing] *PMBOK*, paragraph 12.5, page 156.

4. d. 1.50.
SPI = (EV)/(PV) = (3,000)/(2,000) = 1.50
[Controlling] *PMBOK*, paragraph 10.3.2.4, page 123.

PMI Member Services

PMI-OC CAREER CENTER

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**.

PMI-OC E-MAIL BLAST

Receive an e-mail reminder of all upcoming PMI-OC events.

Join the **PMI-OC E-Mail Blast** by sending an e-mail to **join-blast@pmi-oc.org**.

PMI-OC WEBSITE

Visit our website at **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-OC LIBRARY

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**.

PMI-OC MILESTONES

PMI-OC members receive our monthly newsletter, *Milestones*, containing timely information on upcoming events, continuing education, volunteer activities and other announcements related to our chapter.

You can obtain a free copy of the next *Milestones* by sending your e-mail request to **SampleMilestones@pmi-oc.org**.

PMI-OC Dinner Meeting

Tuesday, February 10, 2004

Program: **How Your Company Can Achieve CMM Level 5**

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
Non-Members	$35.00	Non-Members	$40.00

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

Make your reservation by 9:00 p.m., Thursday, February 5, to obtain the "in advance" price. Reservations made after 9:00 p.m., Thursday, Februrary 5, will be charged the "At Door" price.

If you are unable to attend, please cancel your reservation at www.pmi-oc.org. Members and non-members who cancel after 9:00 p.m. on Sunday, February 8, 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

PMO-Local Interest Group (LIG) Breakfast Roundtable

Tuesday, February 17, 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.

Register: Send your e-mail reservation to info@pmi-oc.org

Cost: Self-paid breakfast, parking is validated

PMI-South OC Breakfast Club

Friday, February 20, 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

Cost: Self-paid breakfast

PMI-Central OC Breakfast Roundtable

Tuesday, February 24, 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.

Register: Send your e-mail reservation to Thomas Sippl at tsippl@pacificlife.com

Cost: Self-paid breakfast, parking is validated

NEW MEMBERS *Continued from page 2*

Sara Gardner
Prescription Solutions
Nicole Hardy
Prescription Solutions
James Porter
SEI InformationTechnology
Mark Dehring
Fluor
Simon Chan
Dekker, Ltd.
Margie Rodriguez
APRIA Healthcare
Mary Seels
Allergan, Inc.
Ken Chow
Fidelity National Information
Ann Michel
Norman Aiello
SureBeam Corp.
Richard Haag
Haag Consulting
Stephanie Marckel
Washington Mutual
Scott Munton
Ameriquest
Lori Peck
OOMC
Rhonda DeLashmit
Health Net Health Plan
Miriam Cardona
Prescription Solutions
Jack Molisani
ProSpring/LavaCon
Luz Johnson
IndyMac Bank
Doug McGarvey
Jacqueline Fretto
Coast Community College District
Diane Haskell
Ceridian
Michael Yu
UCLA/CRESST
Jacquie Cassou
Welch Allyn
Santosh Sahoo
American Honda Motors
Laurence Higgins
Option One Mortgage Corp.
Fabian Lopez
Medsphere Systems Corp.
Fred DiLuzio
Kenneth Burkhouse
BNBCS
Lou Carrier
Consultant/Educator
Gail Nasman
Xerox Corp.
Bryce Weissert
Carollo Engineers
Steve Chow
Kelley Blue Book
Amy Hedrick
Kelley Blue Book
Paul Kay
Juan Lopez
Watson Laboratories
William Carter
Kathleen Gage Dvorak
Manoj Roychowdhury
BearingPoint

Total New Members 68
Total PMI-OC Membership 1,159

PMI Orange County MILESTONES

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

FEBRUARY 10 DINNER MEETING
Our Journey to CMM Level 5
Speaker: Jim Cisneros
Vendor Showcase: SCOPE iT

FEBRUARY 17 BREAKFAST MEETING
PMO-Local Interest Group (LIG) Breakfast Roundtable
See page 15

FEBRUARY 20 BREAKFAST MEETING
South Orange County Breakfast Club
See page 15

FEBRUARY 24 BREAKFAST MEETING
Central Orange County Breakfast Roundtable
See page 15

MARCH 9 DINNER MEETING
Speaker: To Be Announced
Vendor Showcase: Netifice Communications

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
Anaheim, California

For details and registration information on all events for PMI-OC, see www.pmi-oc.org.

PMI® ORANGE COUNTY MILESTONES

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