PMI ORANGE COUNTY MILESTONES

MARCH 2004
Volume 18
Number 3

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.

MARCH 9TH PMI-OC DINNER MEETING

Electronic Project Documentation:
Legal and Practical Problems

By James G. Zack, Jr.

The construction industry is rapidly evolving from project documentation in paper format (hard copy) to electronic format (e-copy). E-mail is rapidly replacing correspondence, meeting minutes, field memoranda, RFIs, etc. Filing cabinets are being replaced with local computer servers or web based servers, and digital photography stored on computers is now taking the place of traditional project photography.

While e-copy project documentation is technologically feasible with current hardware and software, it brings with it certain legal and practical challenges that need to be addressed. The legal issues affecting e-documentation users will be addressed, as well as some practical issues that arise only when e-copy project documentation is employed. The discussion will also involve a practical checklist of safeguards that can be employed to avoid some of the potential pitfalls associated with project e-documentation.

James G. Zack, Jr. is the Executive Director, Corporate Claims Management, Fluor Corporation. Fluor is the world's largest publicly-owned engineering, procurement, construction and maintenance (EPCM) contractor with annual revenue of approximately $11.0 billion.

Fluor performs EPCM projects in the areas of energy, chemicals, infrastructure, manufacturing, life sciences and mining. Mr. Zack is responsible for claims on Fluor's ongoing projects. For 30 years, Mr. Zack has worked on both private and public projects. In the construction claims field, Mr. Zack is a recognized expert in the mitigation, analysis and resolution or defense of claims.

Vendor Showcase: Veric Software
www.vericsoftware.com
See ad on page 3

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NEW PROJECT MANAGEMENT PROFESSIONALS

Laurence Higgins
Olin Scott
Curtis Loucks
Pan Kao
Tara Regan
Dennis Radcliffe
Bryce Weissert
Gilbert Vernon
Bethany Schoenick
Demar Gonzalez
Neil Kapp
Mark Zeider
Arulkumaran Suriakannu
Joseph Rutherford
Rajat Saxena

Total New PMPs 15
Total PMPs 433

NEW MEMBERS

Frank Addeman
Walt Disney Imagineering
Brian Blackledge
Providers Guaranty Corporation
Robert Brault
IBM
George Carter
Matsushita Avionics Systems
William Cashin
Yvon Pierre Chevance
Sanjiv Das
Syncata
Rodney Davis
SCE
Robert Dieter
Vineyard Bank
Alan Egleston
Performance Quality Systems
Steven Engerer
David Fisher
Ingrid Ford
Keane, Inc.
Bonnie Frank
IBM Corporation
Geeta Gilder
Sprint
Nitin Gotmare
Deborah Guy
World Savings
Rhonda Hager
ExecuTrain
Maria Hatz
PacifiCare Behavioral Health
Kristiina Hennesen
ACSC
John Jocson
Washington Mutual
Jeff Keene
IBM
Jan King
Brian Knebel
Pacific Life
Joseph LaRoche
PacifiCare
Theodore Lee
GIMS Interactive, Inc.
Andrew Lee
Matthew Lytthouse
Sridhar Mahadevan
Patrick J. Mallon
Los Angeles County Sheriffs Department
Debby McCamon
Melanie McCarthy

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THE PRESIDENT'S COLUMN

Maximizing Stakeholder Value Through Governance Changes

At the February dinner meeting **Jim Cisneros** discussed ITResources's quest to implement the Capability Maturity Model. Cisneros pointed out that implementing the model itself was not the strategic goal. Rather, the goal was both to demonstrate how his firm added value to its clients and to improve that value proposition over time.

The PMI-OC Board is focusing on similar value proposition issues. As a board, we want to ensure your PMI-OC membership provides you with value today and continues to provide you with value in the future. Our highest priority, three to five year strategic goal, is to maximize stakeholder value. Like the ITResources management team, we have selected a model to help us in our journey.

Component Maturity Model

Several years ago PMI developed the Component Maturity Model to help track how well components like PMI-OC maximize stakeholder value. Many of you have probably heard board members talk about this model in the past. I'd like to take a moment to remind you of the various levels in this model.

1. **Organizational Stage.** Form organization and begin the PMI chartering process.
2. **Operational Stage.** Establish basic core programs, practices, and membership base.
3. **Developmental Stage.** Enhance organizational structure and core programs, products and services for members and other markets.
4. **Strategic Stage.** Assess core competencies and begin to use unique position to attract members, customers, and potential partners.
5. **Maturity Stage.** Operate a multifaceted business operation managed by strategic governance and operational support.

Where Does PMI-OC Fit?

The PMI-OC Board completed a self-assessment using the model in November 2003. We determined that PMI-OC meets or exceeds the majority of criteria in the developmental stage of the model. As an organization, we are ready to begin working on the strategic stage in earnest.

How Will PMI-OC Become Strategic?

The key to moving to the next stage is for the PMI-OC board to shift from focusing on day-to-day operations to leading the organization via strategic governance. Previous boards have planted the seeds for this cultural change. However, we cannot fully implement this change using our current bylaws. Enter the newly formed PMI-OC Governance Committee.

The Governance Committee has been charted to:

- Understand the current PMI-OC governance model
- Compare governance models used by PMI and other PMI components to PMI-OC governance model
- Compare governance models used by other similar non-profit organizations to PMI-OC governance model
- Recommend changes to PMI-OC governance model and supporting governing documents (i.e. PMI-OC Bylaws, PMI-OC Officer Job Descriptions, other appropriate policies)
- Manage the implementation process for approved PMI-OC governance model modifications

What Does This Mean to Me?

Later this year, if all goes well, we will be proposing new bylaws for PMI-OC. You will be asked to study these carefully and determine for yourself if these changes will maximize PMI-OC's value for you. Each member will then be asked to vote on whether or not to approve these bylaws.

I'll try to share as much information with you as possible in future columns so that you can keep abreast of the Governance Committee's progress and, when the time comes, understand the recommended bylaw changes.

If you would like to volunteer to work on the Governance Committee, please contact me.

Kristine A. Hayes Munson, PMP
President

Wednesday, March 17, 2004

PMI-OC Career Networking Evening

Stand-Out Resumes

To compete against hundreds of candidates, your resume must be sharp, distinct, and dynamic. Our presenter, **Bill Lynd**, Manager of Process and Resources for Ameriquest Mortgage, has interviewed hundreds of IT professionals to date and has the arduous task of hiring an additional 400 IT resources this year. Bill will share "insider information" about what employers look for when screening resumes. In this session you will learn how to make an outstanding impression with a results-oriented marketing document. Topics include:

- Resume strategies that will dramatically increase interview rates
- Choosing the best resume format for your situation
- Critical resume elements
- Creating a powerful and attention-grabbing resume
- Resume myths and realities
- Identifying key words that are critical to creating an effective electronic resume

This session will provide you with the foundation you need to create an outstanding resume that is a performance-based road map of your career.

Location:	40 Plus of Orange County, 2040 South Santa Cruz, Suite 245, Anaheim, CA 92805, 714-938-0161
Time:	6:00 p.m. – 9:00 p.m. Registration and food start at 6:00 p.m. Program starts at 6:30 p.m.
Register:	**www.pmi-oc.org** (Pay at the door.) Contact us for additional information.
Cost:	$5.00 PMI-OC members / $5.00 non-members (Covers food and soft drinks.)

Volunteer of the Month

Cornelius Fichtner Honored as Volunteer of the Month for February

*Newly appointed Volunteer Coordinator **Behrad Fardi** (left) presents a Certificate of Appreciation to PMI-OC Chapter's February Volunteer of the Month, **Cornelius Fichtner** (right).*

A resolution was unanimously passed at the January 2004 board meeting of your chapter designating **Cornelius Fichtner** as **Volunteer of the Month for February 2004.** Our newly appointed Chapter Volunteer Coordinator **Behrad Fardi** honored Cornelius at our February 10th general meeting by presenting him with a Certificate of Appreciation.

A recent member of PMI-OC, Cornelius joined in April 2003 and started out almost immediately by volunteering his efforts in support of **Frank Parth**, VP Professional Development. It was under Frank's initiative that the series of advanced topics seminars was developed. Together with **Terry Ehrhard**, Cornelius assumed co-leadership, as well as responsibility for the program.

But that's not where his volunteerism ends. In October 2003, Cornelius became involved as the e-mail *Blast* coordinator, focusing mainly on the technological aspects of the *Blast.* He worked in close coordination with PTS Staffing, whose good offices publish all chapter messages. By December 2003, Cornelius assumed on-going full responsibility for handling any and all recurring technological issues. His most recent volunteer project is serving as the student coordinator for the current PMP prep class.

Regarding his career aspirations, Cornelius' near-term vision is to continue working as a "hands on" project manager. Later, he would like to move into a more strategic position, such as managing a project management office. To aid and abet his vision, he has committed himself to completing the PMP exam by April 2004.

On asking Cornelius for a short quote of what he likes about volunteering for PMI-OC, he replied, *"I very much enjoy the professionalism in PMI-OC and the fact that I get back more than I put in."*

Dave Jacob

PMI-OC LAUNCHES
NEW CORPORATE SPONSORSHIP PROGRAM

Gain Business Exposure! Support the PMI-OC Chapter!

The PMI-OC chapter is supported in its efforts by **CORPORATE SPONSORS**. These businesses provide funds for special events, in-kind services, and other resources. We acknowledge and thank our current and past sponsors for their support and encourage our members to view and be aware of their services. We are continuing to look for new strategic relationships. If your organization is interested in discussing sponsorship opportunities, please contact **Victoria Flanagan**, VP Corporate Relations.

Why Does the PMI Orange County Chapter Need Sponsorship?

PMI-OC is a not-for-profit organization comprised entirely of dedicated volunteers who have the desire to enhance their project management knowledge and skills and to be leaders in advancing the project management profession. As a volunteer organization, our revenue stems from the small annual dues each member pays, fund raisers, and corporate sponsorship. We rely upon our corporate partners to assist us in continuing our mission and meeting our goals and objectives.

Why Should Your Organization Become a PMI-OC Corporate Sponsor?

- Greater visibility as a knowledgeable leader in the field of project management
- Branding opportunities that associate your company as a player in the field of project management
- Focused marketing to a large captive audience of project management professionals
- Opportunities to introduce project management products, services, and techniques
- Partnering with PMI-OC in advancing the project management profession
- Demonstration of your corporate commitment to the project management community, both within your organization and externally to Orange County professionals
- Access to a large pool of qualified project management professionals for filling job openings within your organization and your customers' organizations

What are the Sponsorship Levels and What Do You Get?

We encourage any financial contribution and assistance with our planned events and ongoing activities. Our sponsorship program is structured into four categories of partnership.

1. **Platinum Partner,** $10,000 per year donation
   - A hyperlink version of your company logo or advertisement placed on the PMI-OC website home page, as well as placement and feature on the website resources page, during sponsorship year
   - Opportunity to participate as a featured speaker/presenter at a PMI-OC sponsored event (e.g., annual member meeting, training event)
   - Complimentary subscription to PMI-OC *Milestones* newsletter
   - Mention in the PMI-OC *Milestones* newsletter in the sponsors section and at our annual member meeting
   - Mention in special sponsorship press release
   - Four (4) free dinner passes *per month* to the PMI-OC monthly dinner meeting for your employees, customers, or guests
   - Complimentary participation as an employer with job openings in PMI-OC career networking events
   - Semi-annual meeting with PMI-OC President and VP Corporate Relations
2. **Gold Partner,** $5,000 per year donation
   - A hyperlink version of your company logo or advertisement placed and featured on the resources page of the PMI-OC website during sponsorship year\
   - Mention in the PMI-OC *Milestones* newsletter in the sponsors section and at our annual member meeting
   - Complimentary subscription to PMI-OC *Milestone*s newsletter
   - Mention in special sponsorship press release
   - Two (2) free dinner passes *per month* to the PMI-OC monthly dinner meeting for your employees, customers, or guests
3. **Silver Partner,** $1,000 per year donation
   - A hyperlink version of your company logo or advertisement placed on the resources page of the PMI-OC website during sponsorship year
   - Mention in the PMI-OC *Milestones* newsletter in the sponsors section and at our annual member meeting
   - Six (6) free dinner passes *per year* to the PMI-OC monthly dinner meeting for your employees, customers, or guests
4. **Value Partner**
   Other monetary or non-monetary donations
   - This level of partnering includes monetary donations (other than those listed above), PMI-OC donations (e.g., laptops, projectors, office supplies, facilities), and services offered in kind (e.g., training, printing, legal, financial).
   - Mention in the PMI-OC *Milestones* newsletter in the sponsors section

Where Do the Sponsorship Funds Go?

- Toward various PMI-OC initiatives to expand and improve services for our members
- Toward PMI-OC educational seminars for our members
- Toward the purchase of needed office supplies and special professional services

Other Sponsorship Opportunities:

Advertising

Your business also has the opportunity to advertise your products and services via our monthly PMI-OC *Milestones* newsletter and as a dinner meeting Vendor Showcase.

Milestones ad rates range from $65 (quarter page ad) to $4,860 (full page insert). The Vendor Showcase rate is $250. The details for advertising are listed on our chapter website, www.pmi-oc.org.

Also, your business can be a sponsor by helping to market PMI-OC to your community, members, and employees.

Contact Us

For more information about the various sponsorship packages or advertising opportunities with PMI-OC, please contact **Victoria Flanagan**, VP Corporate Relations, via e-mail, corporaterelations@pmi-oc.org, or

Are You Ready

for a Journey to CMM Level 5?

*. . . If so, **Jim Cisneros** can show you the way. He did so, marvelously, at the February dinner meeting. Jim is the vice president for systems development of Information Technology Resources, Inc., or ITresources, headquartered in Buena Park. His company is a full-service IT organization providing managed services, project-based initiatives, and supplemental staffing.*

Several years ago, a key customer put a simple question to Jim: *"We think ITresources is doing a pretty good job, but how do we know?"*

This question prompted Jim to compare his company with competitors in regards to quality, productivity, and processes. His goal was to have the best-performing software development organization possible, producing predictable estimates and schedules and high quality results. He found that his organization's processes were so inconsistent that "we couldn't even compare ourselves to ourselves."

The Capability Maturity Model (CMM) gave him the best guide.[1] CMM measures the process maturity of a software organization by providing a scale for comparing software contractors. In this context, higher maturity means lower risk. Today, CMM has become **the** model for organizational improvement at the Department of Defense (DoD) and in many commercial companies.

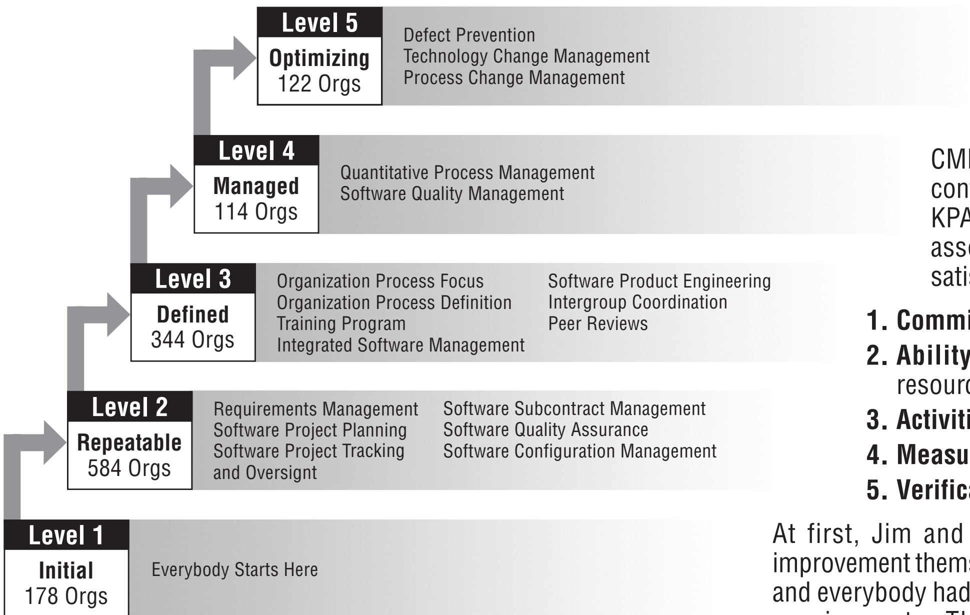

Figure 1: *The CMM's Key Process Areas represent functional characteristics. To reach maturity at a desired level, you must satisfy all the KPAs at and up to that level.*

CMM is structured into five levels. Each level contains several Key Process Areas (KPAs). Each KPA has a defined purpose, specific goals and associated activities as shown in Figure 1. To satisfy a KPA, an organization must demonstrate:

1. **Commitment to perform** (company policy)
2. **Ability to perform** (appropriate skills, training, resources)
3. **Activities performed** (evidence of specific actions)
4. **Measurement and analysis** (quantitative analysis)
5. **Verification** (ensure compliance with process)

At first, Jim and his team started to manage the process improvement themselves. They struggled; the progress was slow, and everybody had difficulty understanding the model and all its requirements. They were trying to make the CMM more complicated than it needed to be.

Jim brought in an outside consultant who was an SEI certified lead assessor.[2] The consultant made them add formality and consistency to their use of systems development methodology. In addition, Jim's team created proprietary templates, forms and examples, which they continuously improved and updated. Training throughout the organization also gained prominent focus, along with a dedicated quality assurance organization cooperating with a series of internal committees (Figure 2).

Internal Groups and Committees

- **Management Steering Committee**
- **Software Engineering Process Group**
- **Software Steering Committee**
- **Technical Review Committee**
- **Various Work Groups**

Figure 2

In this quest, Jim had many great things going for him. For one, he enjoyed strong executive support. He had a formalized SDM in place, with basic quality metrics, and an established process for reviewing key documents. Above all, he had experienced project managers who knew how to create project plans and perform status reporting. On their company portal, Jim's team had a suggestion box where they offered a formal method for soliciting input on their continued improvement process.

*February Speaker **Jim Cisneros***

[1] CMM has been developed by the Software Engineering Institute (SEI), a federally funded R&D center at Carnegie-Mellon United States in Pittsburgh, Pennsylvania. CMM was originally built upon request from DoD and based on surveys of successful software companies.

[2] Process Improvement Associates, based in Redondo Beach, California.

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Journey to CMM Level 5 *Continued from page 6*

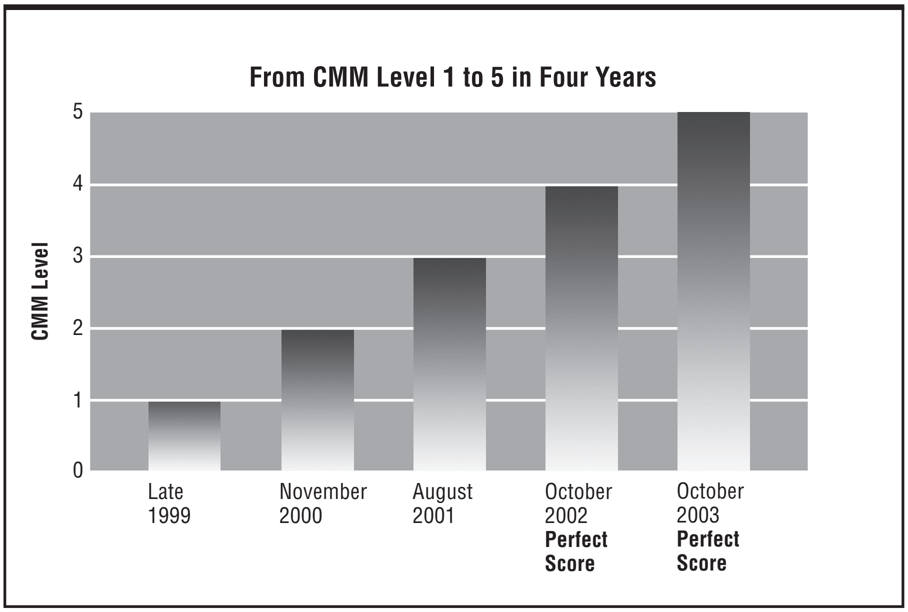

Figure 3: *ITresources did it in five years; the industry average is about eight years.*

Not surprisingly, Jim and his team were successful. Hugely successful! Figure 3 shows their rapid progress. They attained CMM Level 5 in five years. They became one of only 14 US-based companies and the second commercial firm to achieve Level 5.

What turned out to be the key to their success was that Jim's team treated their journey like a project. They had a full-time project manager, who created a project plan and held regular status meetings, all under the benevolent guidance of a management steering committee.

The appointment of the project manager was crucial. Jim recommends choosing a passionate individual who has earned the respect of the organization and who, in turn, has a strong respect for process. This individual must be capable of acting as a mentor and ally, not an impediment.

The company freed up its best people from all levels, developers to managers, for reviewing and improving the process. At each CMM level, they built the infrastructure that they would need at the next higher level, once they had reached it. For example, while implementing the changes for Level 2, they built the platform for Level 3.

To Jim's surprise, the culture change was much easier to bring about than he had dared anticipate. The results of this culture appear in Figure 4.

Why were Jim and his team so successful? They trained for and communicated what they were doing. They explained why they were doing it. They demonstrated how their process improvement would change the people's jobs, and they trained them for doing it. They also offered an open lunch forum for answering questions by enticing the participants with "pizza for projects." They introduced new proprietary tools, templates and examples. Above all, they made it clear that they were willing to change themselves when necessary.

There you have it! You can learn from Jim and his team. He suggested that whoever is interested in pursuing a CMM certification first get a strong buy-in from executives and use a consultant to assist with the work. However, he cautioned not to underestimate the required culture change, and to proceed confidently with small steps.

Jim concluded with, *"You can implement all of this starting tomorrow!"*

Thank you, Jim, for your enthusiastic presentation. We are all the richer for it.

George D. Meier, PMP

At the February Dinner Meeting

*VP Communications **Bill Postma** (left) thanks **Ron Stein** for his many years of service to PMI-OC in coordinating the weekly distribution of the e-mail **Blast.***

*PMI-OC President **Kristine Hayes Munson** and VP Programs **Terry Ehrhard** recognize new PMPs.*

Experience of Companies Without CMM (Per Standish Group)	Experience of ITresources at CMM Level 5
• 28% of projects are installed on schedule and on budget. • 53% of projects are completed at an average of 189% of the original budget. • 31% of projects are cancelled before completion.	**Quality** • According to Gartner, the average CMM Level 5 company has approximately one installed defect per ten function points. • We're seeing about one defect per 100 function points. **Schedule** • 99% of projects are completed on schedule. **Budget** • 98% of projects are completed within plus or minus five percent of budget. • Key for ITresources, most of our projects are done on a fixed fee basis. **Process Control** • Improved staff mobility, all projects are managed the same way. • Tremendous insight into each step of the development process.

Figure 4: *ITresources' software quality is ten times better than that of the average CMM Level 5 company.*

Advanced Topics Seminar Review

High Impact Project Team Communication Seminar

The PMI-OC advanced topics seminar held on January 31st dispensed strong advice on building interpersonal communication skills.

Keith Froehling led the seminar and presented his version of the art of rapport building, influencing with integrity, and maintaining interpersonal relationships. His specialized approach focused on delivering the necessary psychology, techniques, and personal strategies an individual needs to achieve an even greater level of success with their business activities.

Seminar ideas and techniques that were discussed in order to change:

1. You must take action to get new actions.
2. You must get out of your comfort zone.
3. Wake up one hour earlier. You will get more accomplished in that one hour than you will in any other.
4. Your goal must be written and shared with people around you to be effective.
5. Focus on the solutions, not the problems.
6. Your effort equals your reward.

People communicate and respond using three different communication styles.

1. **Visual communication.** Uses body, high energy. Uses words like see, look, visualize, picture.
2. **Auditory communication.** Uses words over body. Uses words like hear, speak, listen, talk, sound, click.
3. **Kinesthetic communication.** Uses words like feel, touch, moved me.

Remember, communication is:

- 7% words
- 28% voice qualities (inflections, tone, dialect)
- 65% body language

To communicate at the highest level with the people you work with, you need to know what communication style they respond best to and use that communication style with them.

You can perform an acid test by asking three people you are close to:

1. What are the three top things you like the most about me?
2. What are the three top things you like the least about me?

Ask them to be honest, and let them know you will **not** hold it against them. Remember, every decision we make is either to **avoid pain** or to **gain pleasure**.

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Guidelines

For Leading Teleconference Meetings

Teleconference meetings are a fact of life in business today. Leading these meetings requires special skills. The purpose of this paper is to document the practices used by experienced project managers and facilitators to leverage those skills across organizations.

I. Set up the meeting

A. Set the date seven days in advance. Follow-up with meeting materials three days (preferable) to 24 hours (less desirable), depending on the purpose of the meeting.

B. Send out materials before the meeting.
   1. Minutes of last meeting
   2. Agenda for this meeting
   3. Define logistics (time, date, location, phone numbers, length of meeting, invitees, facilitator name/number, RSVP). Create a contact list with responsibilities of members, either as input to the meeting or as an output and support document for the meeting.
   4. Get key material in advance; pagers, vacation days, etc.
   5. Get status on action items in advance if possible.

C. Two levels of meetings:
   1. Recurring, once a week: lock in regular calendar date, teleconference number, and time.
   2. Special meeting or first time meeting: send a couple of reminders beginning with a week to a day before.

D. A meeting reminder is recommended for all meetings. It may be included in the meeting notes and/or sent out in a timely manner, two to seven days in advance, depending on the nature of the meeting. Along with reminder notice, ask people to give status prior to meeting if they cannot attend.

E. Be sensitive to time differences in time zones. Note PST, CST, etc., in meeting notice.

II. Open the call

A. Get everyone's name.

B. Get everyone's responsibility related to the meeting purpose. This helps everyone understand all of the players' roles for this project. (This is not necessary for everyone at regular meetings, just for new attendees.)
   1. Call leader can introduce participants, including area of responsibility, as they relate to the meeting (re-establishes host as leader of meeting).
   2. Obtain alignment at the beginning of the meeting by reviewing the objectives and agenda

III. Set up expectations through the meeting notice and agenda. This can improve attendance and increase the likelihood that an invitee will send in materials in advance to the facilitator if the invitee can't attend.

A. Identify the business objective.

B. Identify the meeting objective.
   1. Provide information (may include sharing status on action items, task).
   2. Achieve consensus, make decisions, resolve issues.
   3. Assign work (generate action items, commitment to project tasks).

C. Identify the agenda. People may make a decision to attend or not, depending on the agenda. Typical meetings have an inherent structure with three general parts. First, get the attendees focused in the same direction; second, accomplish the work; third, review. The agenda should state the desired outcomes. That may be a timeline, draft memo, level setting or many other things, but it helps frame expectations and makes it seem meaningful if people call in knowing there is an expectation for something to be delivered by the end of the meeting.
   1. In the upper left-hand corner of the agenda, insert clip art every week (use whatever you can to increase interest so folks will actually look at your materials).
   2. Agenda may have four to five canned agenda items, e.g., introductions, action items, issues, round table. Then add specific topic areas related to the project.
   3. If there are no supporting documents, the agenda needs to be very specific. If there is documentation, high-level agenda items will suffice.
   4. People are creatures of habit. An agenda provides a structure that people can anticipate and depend on.
   5. Establish time for agenda items, and stick to time frames. If you ignore time slots, you will lose the group's confidence in the structure.

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Advanced Topics Seminar Review

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We all thank Keith for lending his time, for working with our members, and for bringing his passion to our special events offerings.

Participant Comments and Insights

- The timing was perfect. I was planning to take this weekend to define my goals, and this class helped solidify this. Best four hours I ever spent.
- Belief analysis, explore yourself.
- Connect; believe in yourself.
- Come out of the shell.
- At work I will share my goals with my teams so they become more focused and take responsibility
- This seminar is a new experience for me. Being a scientific person, I haven't given any time or energy to the power of the mind outside of academic endeavors.

And thank you, members, for your participation. For more information about Keith, visit www.keithfroehling.com.

David Gifford
Advanced Topics Committee
Volunteer

Professional Development

Ever thought you could use some advice on your projects? Now you can get it. PMI-OC is forming a mentoring group to combine our more experienced members with our members who could use some objective advice on their projects.

For more details, contact **Frank Parth** at professionaldevelopment@pmi-oc.org.

For our members who are independent trainers and consultants, help us explore what we can do to help you.

If a PMI-OC web page listing of your products and services would be useful, please contact **Frank Parth** and help define the requirement at professional development@pmi-oc.org.

Maximizing Project Success

Are You Missing an Opportunity?

Most of you are proficient at risk assessment and wouldn't dream of creating a project plan without one. But how many of you routinely assess opportunities? It's as important to analyze ways to capitalize on what could go right as it is to avoid what could go wrong.

Way back when, I managed a large product development project. Of course, time to market was everything, and we committed ourselves to using opportunity analysis as a way to speed up the project. As a result of that analysis and the action plan we created to take advantage of the opportunities we identified, we shortened the cycle time of the project by a year, beating our competition to the market also by a year. We instantly captured the market leadership position. That one year advantage translated into about a billion dollars of sales over the life of the product. That experience made me a believer in opportunity assessment.

The steps for doing an opportunity assessment are very similar to steps of risk assessment, except that you're looking at positives instead of negatives. Before you begin, assemble your team, just as you would in a risk assessment process. Then, lead the team through the following stages of assessing opportunities.

Stage 1. Define the goal you're trying to reach. What is it you're trying to accomplish? In my example above, the goal was shortening the time to market.

Stage 2. Brainstorm all the possible opportunities that might allow you to reach your goal. Remember to stick to the rules of brainstorming so no ideas are judged.

Stage 3. Analyze the opportunities. What is the probability that each opportunity will occur? Rate each potential opportunity as zero, low, medium or high probability. Set aside the zero probabilities. Next, rate the impact if the opportunity did occur. (The impact in this case is positive instead of negative, as it is in the case of risk assessment.) Rate the impact as low, medium or high. Create a PI matrix (Probability Impact matrix). Place the opportunities on the matrix.

Stage 4. Brainstorm actions. Brainstorm all the actions that you could take to capture the opportunities, starting with the high probability, high impact opportunities and working your way down the matrix. Record each potential action.

Stage 5. Analyze the actions. First, create criteria for choosing the actions you will seriously consider. One criterion might be ease of implementation. Use a team decision making process to work through the analysis steps. Choose one or several actions to implement, and include those in the project plan.

Stage 6. Monitor actions. During the implementation or execution phase of your project, monitor the opportunity actions you included in the plan, just as you would monitor risk countermeasures. Periodically reassess any new opportunities that might arise.

Stage 7. Identify lessons learned. During the close out phase, review the opportunity assessment process. What went well? What could you do better next time? Archive your results.

Voilá, you've mastered basic opportunity assessment. In my not so humble opinion, opportunity assessment is a vastly underutilized tool. We'd love to hear from those of you who have used it successfully. Tell us your stories, and we'll post them on our new risk web site. If you haven't used opportunity assessment in the past, give it a try and let us know how it works for you.

Paula K. Martin

Paula Martin is the CEO of Martin Training Associates, a management training and consulting firm.

Send your opportunity assessment stories to: pmartin@martintraining.net. For more information, visit the Martin Training website: www.martintraining.net or our new risk website: www.appliedriskassessment.com. Phone: 866-922-3122 or 513-563-3512.

PMI®

Career Networking Evening

The February 18, 2004 **PMI-OC Career Networking Evening** featured the quarterly **Karma Club** event. After a new menu of Subway sandwiches, salad, and cookies, **Rod Hendrixson** formally opened the meeting and presented a tentative schedule of upcoming events. Stay tuned to www.pmi-oc.org under "Events."

Rod spoke briefly of Karma Club goals. These sessions are the "stuff" that help individuals create better self-marketing techniques in job transition and throughout a career. The starting point for Karma Club is to understand the impact your 30-second commercial can have, then refine it to work to your advantage. Consider television commercials that are often less than 30 seconds. Which get your attention?

Participants listening to the Karma Club opening dialogue.

Each participant presenting his/her thirty second commercial and networking.

Melanie McCarthy explained to the breakout sessions that improved networking begins with the 30-second commercial. Melanie further expanded on areas to exploit for job leads and networking:

- Personal contacts
- Prior work colleagues
- Vendors and/or consultants
- Company info and leads
- Professional associations (join a minimum of two: one in your discipline, one in your industry)

Melanie noted that **Lee Dereschuk** uses a proactive approach to discover job leads by creating a database of targeted companies with in-depth information and contacts. Lee then makes cold calls and sends letters and faxes based on real knowledge. Lee's impressive hit ratio includes formal interviews and expectations of quick re-employment. The point is to be a go-getter.

Melanie further noted that statistics point to networking as the best tactic to obtain your next job lead and your next job. Differentiating yourself both in your 30-second commercial and resume are surefire ways to get your target's attention and to make sure he or she remembers you. Melanie then explained the Karma Club **rules** of the evening.

There were three facilitators, **Doug McGarvey, Rod Hendrixson, and Melanie McCarthy,** to adroitly guide the sessions. The audience divided into three rooms, with one facilitator per room. First, each person gave his or her 30-second commercial. Then peers offered suggestions for company or industry leads and often had a contact name for that person to pursue. In addition, peers critiqued the 30-second commercial. The environment was friendly, encouraging, and highly useful to the participants.

Each person was allotted six minutes for the 30-second commercial and peer follow-up. Facilitators were equipped with timers to ensure compliance. With approximately one and a half hours available, participants rotated to other rooms to meet new groups. This gave other opportunities for the 30-second commercial and to receive new leads and contacts. Doug reminded us to carefully choose the words we use to market ourselves and to modulate voice tone. A monotone voice may indicate lack of enthusiasm, energy and confidence.

The evening ended with a business card drawing. Lucky winner **Arul Suriakannu** received an Office Depot certificate, and **Art Hiester** won a Starbucks gift card.

Gretchen M. Staff

Participants completing evaluation forms.

Test Your Knowledge on PMP® Exam Questions

Answers are on page 17

Here is a sample of some questions:

1. Expert judgment in the initiation process is used to:
   a. Assess the inputs to this process.
   b. Assess the outputs to this process.
   c. Prepare the project charter.
   d. Document constraints and assumptions.

2. If you are doing a project under a contract:
   a. The signed contract generally serves as the project charter.
   b. You need the buyer to prepare a charter for you.
   c. The statement of work is your charter.
   d. You should prepare a charter and get the buyer to sign off on it.

3. A scope change is any modification to the:
   a. Agreed upon scope as defined by the scope change control system.
   b. Agreed upon scope as defined by the approved WBS.
   c. Process seller invoices in a timely manner.
   d. Establish and maintain a change control system.

4. Contract close-out and administrative closure processes are similar because:
   a. Both have contract documentation as their input
   b. All final documentation must be prepared at this time.
   c. Both have specific procedures that must be followed.
   d. Both involve verifying that the work was completed correctly and satisfactorily.


"Take on another project! I'm not sure where we stand on the ones we have..."
The Project Manager
Get your hands around the work capacity of your organization -
- Manage to your organization's capacity! True capacity includes project work, recurring work, and administrative. Real-time web access to the central repository for managers, contributors, customers, etc. for enterprise management.
- Search your resource pool for the best skill match with your project requirements. Consider availability, and the criticalness & proficiency of multiple skills. Click on the ranked list to allocate!
- We offer 100% web software with a personalized web portal, rich business logic, and a central repository, to help you manage your projects and your workforce
Call, fax or email today for our FREE CD-ROM demo!
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 Continued from page 8

6. Sell the meeting in the e-mail if the agenda is an attachment. Sometimes putting the agenda on the meeting request in the text of the e-mail message is appropriate.
7. Length of meeting and times
   a. Attempt to be sensitive to the attendees' schedules.
   b. Time frames recommended: One to one and a half hours. Meetings beyond one and a half hours generally don't get participation, or participants drop off before the end.
   c. If you can end early, do so. People will learn that you are sensitive to their schedules and will arrive on time and participate.
   d. If you have to run over, acknowledge this and get agreement from the group.
8. Use a standard template for the agendas in order to save time formatting and to increase familiarity.

IV. Protocols

A. Ask speakers to identify themselves before speaking each time.
B. The call leader should remind people to identify themselves if they forget.
C. Do you need to set up ground rules in advance? For a small group, perhaps no, but for a large group, yes.
D. Standard ground rules:
   1. One speaker at a time
   2. No side conversations
   3. Have attendee's phone on mute if there is excessive background noise or if the attendee gets pulled momentarily away from the call.
   4. If anyone is having trouble hearing, ask the speaker to speak up.
   5. If in a conference room, do not have the speaker phone near papers.
   6. On recurring meetings, the call leader may need to occasionally renew the ground rules.
D. Review new action item assignments and deliverables at the end of the call
E. Have a "lightning round" (round table), at end of meeting. Lightning round implies a short time frame of one to two minutes of input per attendee.

V. Attendance

A. How many should attend; the ideal number of attendees for a meeting depends upon the subject.
B. How to get folks to arrive on time:
   1. Identify a third party who can page key members to the line .
   2. Set up expectations about timely arrival.
C. Should the meeting end without key personnel, and how long should you wait?
   1. If you can work the meeting around other topics or key issues, continue the meeting. If not, reschedule.
   2. Along with the reminder notice, ask people to give status on their assignments prior to meeting, especially if they cannot attend.
D. To encourage attendance of key participants:
   1. Note absentees in meeting notes, cc: to supervisor.
   2. Talk directly to key participants to determine absentee problem.
   3. Next, go to supervisor of missing team member.

VI. Facilitation versus a project meeting

Facilitation involves helping others discuss an issue among themselves and come to a solution. Project management involves leading others in creating solutions, but implies more communication toward the leader than between the attendees. They require very similar skills, but facilitation demands emphasis on team members truly communicating with each other.

VII. Conference phones logistics

A. Check out the physical location. Schedule the room ahead of time to check physical logistics; check for connection and cord length. Be sure that you know how to work the phone and that it works. Be sure you have adequate time reserved for the room for the meeting.
B. Set up special ground rules. If anyone is having trouble hearing, it is acceptable to ask the people in room to speak up, to ask to have the phone moved away from paper, or for the speakers to identify themselves.

VIII. Dealing with bad phone reception

A. If you can tell whose connection is causing the problem, ask them to drop off and call back in.
B. If you can't tell who is causing the problem, have all cell phones drop off and come back in.
C. If there are no cell callers, have all participants drop off and call back in two minutes (maybe someone got a bad line).

IX. Scribing: who does it?

A. Since most of us do our own, ask the participants to keep us honest.
B. Send a draft out to a core team member for review before sending it out to the entire team.
C. There is value in typing up your own minutes because you learn more about the project.

X. What information is necessary in the minutes?

A. Action items
B. Issues and risks
C. Decisions
D. Jeopardies and discussions about critical items.

XI. Redirecting the meeting when the discussion is off track or out of scope

A. It is the leader's job to pull the meeting back in. Say you will post the item in question to be revisited at the end of the meeting, or create an action item.
B. If two people are speaking at the same time, interrupt. Name the first to speak, and then give time for the other to speak.
C. One person monopolizes the meeting.
   1. Interrupt the speaker and restate their information/position for the team's benefit; this helps tactfully cut the speaker's monologue.
   2. If unable to recollect the meeting, as a last resort with a persistent participant, ask the group if they feel the item is germane to this discussion.
   3. The call leader should be aware of who hasn't participated because of others monopolizing the conversation or having side conversations. Draw those people in, and make sure everyone has a voice in the meeting.

XII. Difficulty understanding because of accent or method of speaking

A. Ask the person to speak more slowly.
B. Ask someone else to explain the item in laymen's terms.
C. If you still cannot understand completely, follow up with an e-mail after the session to verify your understanding and to get agreement from the participant.

XIII. Someone comes in and won't identify themselves

A. If scheduled through the conference planning group, you can often check on who called in.
B. You may have a "lock out" on the meeting at a scheduled time to ensure no unwanted guests arrive.
C. If the items are very sensitive, drop the call and reschedule with only the required participants.

Theresa Theiler, PMP

Breakfast Meeting Minutes

The January 27, 2004 meeting of the **Central OC Breakfast Round Table**, Costa Mesa, was held at the usual time and location, 7:15 a.m. at the Costa Mesa Hilton (formerly Red Lion).

The attendees included representatives from large companies, including Pacific Life, Nissan, and the County of Orange (PMO in formation), as well as employees of small companies and project managers in transition. Among them were three PMPs and three PMP candidates in exam preparation mode. One “formerly” in transition was accepting one of two offers he had just received, and another had what was expected to be a final and successful interview, both that same day.

One of the discussion topics was “how to determine if the project management staff is under- or over-utilized or just at just the right capacity.” Discussion surrounded numerous related topics.

A benchmark was presented, stating that the project management function should average around 20% of the total work time of the rest of the project. Other members voiced that their experience ranged from a low of about 20% all the way up to 35%.

Factors included in the parametric model method could be: 1) number of projects being managed, 2) newness of technology in the product of the project or the development of the product, 3) number of applications impacted by the project, 4) new project type or “cookie cutter,” 5) robustness of project management methodology applied at the organization, 6) number of team members or roles on the project, plus several others.

One of the attendees asked, “How would a program manager or PMO director know when a project manager was able to take on more project work, or if one or more project managers was “overworked,” or when and if more project management staff should be added to the organization?”

Microsoft’s Share Point Portal application was discussed by one attendee who was using it as an alternative to a full EPM tool deployment. The attendee shared the story of its use to manage groups who had different deliverables in different parts of the country and the world.

One attendee requested input on a quality plan template. Several at the table shared experiences, offered to share templates, and also shared Internet resources such as www.SCQAA.com, Quality Assurance of Orange County, and www.QAIUSA.com. The Quality Assurance Institute, the www. TenStep.comorganization, as well as PMI itself, should also be checked out.

Please feel free to join us on the fourth Tuesday morning of the month by registering at www.pmi-oc.org.

Answers to PMP® Exam Questions

From page 11

1. a. **Assess the inputs to this process.**
   [Initiating] *PMBOK®*, paragraph 5.1.2.2, page 54

2. a. **The signed contract generally serves as the project charter.**
   [Initiating] *PMBOK®* , paragraph 5.1.3.1, page 55

3. b. **Agreed upon scope as defined by the approved WBS.**
   [Controlling] *PMBOK®*, paragraph, 5.5.3.1, page 63

4. d. **Both involve verifying that the work was completed correctly and satisfactorily.**
   [Closing] *PMBOK®*, paragraph 12.6, page 158

Member Services

PMI-OC CAREER CENTER

Find your ideal project management job or find an experienced resource for your organization. For more information, see the **Career Center** on our website at **www.pmi-oc.org/careers/** or 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.** Make reservations for the dinner meetings, as well as other events, and stay informed of activities that are important to members and to the project management community.

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®

NEWS FROM HEADQUARTERS

Call for Volunteers

Have you ever wanted to make a difference and be part of group that helps define the future in various project management streams? Well, if you have, then PMI® Global is offering you an opportunity to do so **and** earn PDUs at the same time.

How can you do this? By volunteering to be a member of a practice standard development team. Currently, there are practice standards under development for scheduling, program and portfolio management, and configuration management. The *Practice Standard for Work Breakdown Structures* is undergoing an update cycle, and PMI® is also developing an automotive extension to the *PMBOK® Guide*.

Over the past month, the exposure draft of the *Earned Value Management Practice Standard* has been posted on the PMI® website with an open call to PMI® members for review comments.

Participating in the development of a practice standard, either as a team member, or as a reviewer, can be very fulfilling. It is in this forum that you have a chance to help with the development of a practice standard that will be recognized globally.

It is a well-known fact that the *PMBOK® Guide* and the *WBS Practice Standard* are two of the most purchased books from PMI®. *OPM3*, which was recently released, is on back-order. Volunteers from PMI® worldwide developed all of these books.

Currently, the PS Scheduling Core Team is looking for members to volunteer to be on any of the five component committees for the *Scheduling Practice Standard*. We have only recently started developing the committees, so now is a perfect time to join and have an impact on the standard. The five committees are as follows:

The **Descriptors Committee**, which deals with the components that are descriptive in nature, will be headed by **Amy Vaccari**, amy.vaccari@metier.com, and T**rixy Longbothum**, trixy.longbothum@metier.com

The **Date/Time Committee**, which deals with the components that are associated with time, will be headed by **Mike Mosley**, mosleym@zachry.com and **Peter Dimov**, peterdimov@yahoo.com.

The **Effort Committee**, which deals with the components that are associated with the work to be performed, will be headed by **Don Green**, deggreen@aol.com and **Charlie Follin**, ctf@projectaide.com

The **Analysis Committee**, which deals with the components that are used to analyze the schedule, will be headed by **Bethany Schoenick**, schoenick54@yahoo.com and **Tammo Wilkens**, ttw2@pobox.com

The **Presentation Committee**, which deals with the components that are associated with presenting the schedule to others, will be headed by **Jennifer Read**, jenread@sympatico.ca, and **Marie Gunnerson**, gunnerson@pbworld.com

If you are interested in volunteering, but not on the scheduling team, you can find more information about the requirements and currently available opportunities at http://www.pmi.org/info/AP_VolunteerOverview.asp?nav=0211 .

If you have any questions about what is required of a volunteer and the time commitment, you can also send me e-mail at schoenick54@yahoo.com

Please consider volunteering, and seize the opportunity to pass on your knowledge and expertise throughout the PMI® community.

Bethany Schoenick, PMP
Core Team Member, Scheduling Practice Standard

Call for Papers

The PMI® College of Performance Management is seeking speakers for its upcoming Annual Spring Conference in Clearwater, Florida. Topics should address project management baselining and performance metrics.

The event will be held May 12-14. Speakers receive up to 50% off of the conference registration fee. For more information visit www.pmi-cpm.org or e-mail RayStratton@mgmt-technologies.com.

PMI-OC Dinner Meeting

Tuesday, March 9, 2004

Program: **Electronic Project Documentation: Legal and Practical Problems**
By James G. Zack, Jr.

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., Sunday, March 7, to obtain the "in advance" price. Reservations made after 9:00 p.m., Sunday, March 7, 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, March 7, 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, March 16, 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, March 19, 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, March 23, 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

John Mudnich
The Culver Group

Angie Neal
Toyota Motor Sales of America

Nicole Nguyen
PacifiCare Health Systems

Robert Perrine

Harry Persaud
County of Orange

Thomas Pruner
New Century Mortgage Corp.

Teresa Ricks
Data Trace

Edwin Roberts
Logical Solutions

Lynne Rosiak
PacifiCare Health Systems

Elena Rozin

Neil Sahota

Patrick Shahijanian
Compublue, Inc.

Tim Scott Simonson
Fluor Corporation

Judith Smith
ULR

Arulkumaran Suriakannu

Georgette Tipton

Pierre Tran
Option One Mortgage Corporation

Bill Van Beek
Biola University

Kamyar Varzandeh
Kamyar Consulting

B Wells
BC Wells Consulting, Inc.

David Wiley

Richard Wolf

Donald Wright
Southern California Edison

Louis Wu
GE Medical Systems

Lee Ann Zambrano
PacifiCare Health Systems

Total New Members	**57**
Total PMI-OC Membership	**1,174**

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

MARCH 6 ADVANCED TOPICS SEMINAR

MARCH 9 DINNER MEETING
Electronic Project Documentation: Legal and Practical Problems
Speaker: James G. Zack, Jr.
Vendor Showcase: Veric Software

MARCH 16 BREAKFAST MEETING
PMO-Local Interest Group (LIG) Breakfast Roundtable
See page 15

MARCH 17 CAREER NETWORKING EVENT
Stand-Out Resumes
See page 3

MARCH 19 BREAKFAST MEETING
South Orange County Breakfast Club
See page 15

MARCH 22-25 PROJECT WORLD LA
Los Angeles, California

MARCH 23 BREAKFAST MEETING
Central Orange County Breakfast Roundtable
See page 15

APRIL 13 DINNER MEETING
Speaker: To be Announced
Vendor Showcase: Unlimited Innovations, Inc.

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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RETURN SERVICE REQUESTED