PMI ORANGE COUNTY CHAPTER MILESTONES

MAY 2005
Volume 17
Number 5

PMI-OC VISION

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MAY 10TH PMI-OC DINNER MEETING

Running a PMO in a Decentralized Organization

By Ken Taylor, PMP
Vice President, Project Management Office, Ameriquest Mortgage

Project management offices provide value to enterprises by standardizing processes around best practices. The intent is to enhance quality, improve velocity, and efficiently manage costs through the reduction of non-value-added variability. The implementation of standardization can take different forms, but is typically achieved via mandate.

How can a PMO add value in its traditional role within a fully decentralized organization? What is the best way to positively influence the project process when parts of the organization can choose not to use the processes and practices defined by the PMO?

In this presentation, **Ken Taylor** will present the approach that the Ameriquest PMO has taken to be perceived as a value-added resource, in effect creating a "pull" for PMO services vs. a "push."

Ken Taylor, PMP, Vice President Project Management Office (PMO) at Ameriquest Mortgage, has worked in information technology for 20 years. Ken was a consultant at Andersen Consulting (now Accenture), ran application development for North America at Nestle, and was a CIO at NEC, USCS, and DST Output.

Ken also ran an e-commerce division for a data services company and owned and operated a consulting firm focused on implementing software engineering best practices. He has a bachelor's degree in economics, an MBA in operations, and a PhD. in business administration. Ken is a PMP®, a CPIM, and a Certified Six Sigma Master Black Belt.

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LEADERSHIP CHANGES

New Programs Director Appointed to PMI-OC Board of Directors

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NEW MEMBERS

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THE CHAIR'S COLUMN

Leadership Changes and Learnings

So much has happened since last month's column. The only thing that is constant is change.

PMI-OC Board Change

On the next page of this month's *Milestones* you will see changes to the PMI-OC Board of Directors. **Terry Ehrhard** decided to resign as Programs Director. During his tenure on the board, Terry served as Vice President Membership and Vice President Programs. His input will be missed. Terry constantly reminds me of the importance of questioning why we do things. He is never satisfied with the answer "we've always done it that way." One of his biggest achievements was implementing the current dinner meeting pricing structure, including the introduction of the speaker only option. I wish Terry all the best and hope to see him at future PMI-OC events.

As per the PMI-OC bylaws, the board appointed **Cornelius Fichtner, PMP** to complete the 2005 Programs Director term. I am pleased to welcome Cornelius to the board. He has been volunteering as the Advanced Topics Seminar Chair and was recently named PMI-OC 2004 Volunteer of the Year. Please join me in welcoming Cornelius to the board.

Finding the Leader Within

I missed seeing everyone at the April dinner meeting, although I thoroughly enjoyed the April Advanced Topics Seminar, which I attended instead (see page 9). As I mentioned last month, I was in Orlando attending the PMI® Leadership Institute Class of 2005's second face-to-face gathering, which was themed "Finding the Leader Within." What an amazing experience! I find it difficult to articulate the many lessons I learned. The journey to improve my leadership abilities has become an intensely personal one as I discover new aspects of myself. I'd like to share with you two of the most powerful exercises we experienced as a group under the able direction of facilitator **Jerry Brightman**.

Life Experiences Exercise

The first exercise looked at our how our life experiences and our reactions to those experiences impact us as leaders. In our learning journals prior to arriving in Orlando, each of us recorded significant life experiences and what we learned from each one. We organized these experiences in seven-year increments (i.e. ages 0 to 7, 8 to 14, 15 to 21, etc.). I spent several hours reflecting on my life, reliving both painful and happy memories. I was amazed at how deeply my early childhood and teenage experiences impact my current leadership style. I also realized the ongoing impact of my parents' expectations of me as a child in my daily life. I began to wonder how my expectations today will shape the adult lives of my three children.

As a group we spent over an hour writing down these events and learnings anonymously on flip charts and walking around the room quietly reading the reflections of others. I was humbled and awestruck. My big take away from the exercise debriefing discussion was the importance of creating a safe environment where team members are willing to share. Plus, I left with a renewed desire to discover ways to celebrate the diverse, and yet often common, life experiences of each team member.

Personal Tribute Exercise

The second deeply impacting exercise was to write a tribute to myself. We were asked to imagine that we were going to be honored as leader of the year. Then we spent twenty minutes writing tributes to ourselves, explaining to the hundreds of people at the ceremony why we were receiving the award. Each participant, in turn, stood and read their tribute to the group. The group consensus was that this was one of the most difficult learning exercises we participated in during the session. We all found it easy to be self critical and to judge ourselves harshly. It was much harder to sing the praises of our success and accept the congratulations of the group for a job well done.

The Journey Continues

This column barely touches the surface of my recent leadership institute experiences. My leadership journey of self discovery continues. I look forward to continuing to share this journey with you.

Kristine A. Hayes Munson, PMP
PMI-OC Chair/President

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LEADERSHIP CHANGES

New Programs Director Appointed

Regretfully, we must announce that **Terry Ehrhard** has resigned from his position as PMI-OC Programs Director for personal reasons. His resignation became effective on March 22, 2005. Terry's contributions and experiences are very difficult to replace. We would like to thank Terry and extend our best wishes.

It is our great pleasure to announce that **Cornelius Fichtner, PMP** is the new Programs Director of PMI-OC. It was a unanimous decision at the PMI-OC Board of Directors meeting on April 26, 2005. In fact, Cornelius is not new at all to most PMI-OC members.

Cornelius joined PMI-OC in April 2003 and started out almost immediately volunteering his efforts in support of **Frank Parth, PMP**, then Vice President Professional Development. It was under Frank's initiative that the Advanced Topics Seminars series was developed. Together with Terry Ehrhard, Cornelius assumed co-leadership, as well as responsibility for Advanced Topics Seminars.

However, that is not where his volunteerism ended. In October 2003, Cornelius became involved as the *E-Mail Blast* coordinator. He supported **Bill Postma, PMP**, then Vice President Communications, for one full year in this position before finding his own replacement, **Dan Rufer, PMP**, who is the *E-Mail Blast* coordinator to this day.

In both 2003 and 2004, Cornelius was active on the election committee, helping ensure that the board of directors elections at the dinner meeting were trouble-free.

By December 2003 Cornelius assumed full responsibility for managing the Advanced Topics Seminars programs. Since then, the seminars have been scheduled on the first Saturday of each month, making them a highlight on the PMI-OC calendar. Feedback from both attendees and speakers has been overwhelmingly positive.

In recognition of his many contributions and achievements, Cornelius was honored as Volunteer of the Year for 2004 with an award presented at the March 2005 dinner meeting.

Congratulations, Cornelius, and welcome aboard!

The PMI-OC Board of Directors

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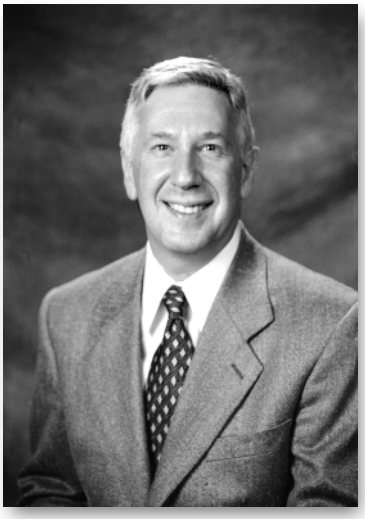

The most successful Project Portfolio Management practices incorporate a Balanced Scorecard Management System at each business unit level. Today's complex business structures and critical objectives like Sarbanes-Oxley, require precision strategies to be employed based on internal procedures and resulting outcomes. The Balanced Scorecard formula includes integrated collection and analysis of critical data pertinent to the vision and goals set by the enterprise. Gain a fundamental knowledge on developing and implementing an effective Balanced Scorecard System at the Dekker PPM Forum™ 2005.

Gerald I. Kendall Keynote Speaker

Gerald I. Kendall, PMP, Principal, TOC International, is a recognized world expert at strategic planning and project portfolio management. Mr. Kendall will be speaking on **"Advanced Project Portfolio Management - Do You Want to be a Legend?"** His clients include Telstra, British American Tobacco, Raytheon, Babcock & Wilcox, Alcan Aluminum, Covad Communications and Lockheed Martin. He's authored three books, contributed to two books and written numerous articles and white papers.

May 23-26 San Diego

General Session, May 23, features Keynote Presentation by Gerald I. Kendall and additional guest speakers from industry and government. Continental breakfast, lunch and refreshments at breaks are provided. **PLUS** - Bonus Evening Dinner Event.

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Volunteer of the Month

Sriram Ramadas, PMP

A resolution was unanimously passed at the March 2005 board meeting of your chapter designating **Sriram Ramadas, PMP as the Volunteer of the Month for April 2005.** Volunteer Chair **Brent Felsted** honored Sriram at our April dinner meeting by presenting him with a Certificate of Appreciation.

Sriram joined PMI® and our chapter in December 2002, within a month after receiving his PMP® certificate. In only a matter of days after joining, he accepted the volunteer position as chairman/director of the advertising program. A true unsung hero, his service in this capacity lasted until February 2005.

Not satisfied to rest on his laurels, he took on the daunting role of chairman of the chapter's very successful outreach program. The success of both programs is in no small part due to his unflagging efforts.

Sriram works for The Laxmi Group, Inc. in IT services and solutions space, including business development, account management and project management and coordination.

When asked what he likes about volunteering for PMI-OC, Sriram replied, "I've really enjoyed my involvement with the chapter and feel very comfortable with the friendly members. I enjoy meeting new people, and the chapter gives me that opportunity."

"While I must admit that one of the main reasons I started volunteering for the chapter was to get PDUs, I quickly started enjoying my volunteer role. Some of the key reasons

were the feelings of being needed and useful and the freedom I had working with the chapter board. All the people with whom I've worked and interacted so far have been very friendly and have known how to direct volunteers and delegate responsibility, which I feel is quite unlike managing paid employees."

Sriram further added, "I would like for those who want that extra something from life to volunteer, and volunteer for the PMI-OC chapter."

Dave Jacob

Project of the Year

The PMI-OC 2004 Project of the Year Award was presented to the Nacra "A2" A-Class Catamaran at the April dinner meeting.

Jeremy Laundergan of Askeland Engineering was the project manager and designer of the "A2" A-Class Catamaran. **Pete Melvin** of Morrelli and Melvin Design and Engineering was the project sponsor and designer.

An A-class catamaran is an 18 foot long single-handed sailboat that meets four requirements of length, width, sail area and weight. After being introduced in the 1960s, this class of sailboat has steadily gained worldwide popularity. Approximately five designers and builders have A-class catamaran designs that compete against each other internationally.

We are delighted to present this project as our chapter's project of the year award because it represents four important characteristics of Orange County and the project management community we serve.

*Left to right: PMI-OC Marketing Director **Diane Altwies, PMP** and **Frank Reynolds, PMP** proudly present the 2004 Project of the Year Award to **Jeremy Laundergan** and **Pete Melvin** in recognition of their Nacra "A2" A-Class Catamaran project.*

1. Entrepreneurship. The A2 was a speculative venture designed to place a more competitive product in a niche where the sponsoring organization had previously succeeded. As a project with a low budget, all the participants were keenly aware of the need to control costs through innovative and careful work; plus they faced a self-imposed deadline: the North American A-Class Catamaran Championship event where they wanted to make the A2 debut.

2. Excellence. Orange County is known for its quality in a variety of specialty businesses, including watercraft, sports clothing, pharmaceuticals and aerospace engineering. Sailing the A2, Pete Melvin dominated the 2004 A-Class Catamaran North American Championship, winning seven of eleven races against a field of 28 other boats. The Nacra A2 was awarded S*ailing World Magazine's* 2005 "Performance Boat of the Year" award.

3. Integration. Nimble design, fabrication, and production are often accomplished, even in small ventures, by the contributions of a variety of specialists. This is true of the Nacra A2, whose development involved staffing and components provided by **John Conser** (team member) of Conser Catamarans; **Josh Horst** (team member) of Kvichak Marine Industries; and tooling fabrication by Janicki Industries in Washington State.

The mast was supplied by Hall Spars of Bristol, RI, and prototype beams were custom fabricated by a subcontractor in Massachusetts. Commercial off the shelf components were utilized wherever possible.

4. Spin-off. Jeremy Laundergan previously worked with Boeing Space Systems Composite Development on carbon fiber structures for the Delta series of rockets. Jeremy's experience and exposure to project management was a tremendous asset in this smaller scale and vastly different commercial setting.

Performance Catamaran (owned by Catalina Yachts), the producers of Nacra, Inter, and Prindle Catamarans, recognized the potential of the A2 after Morrelli and Melvin's initial production run and entered an assembly, marketing, sales and distribution contract with Morrelli and Melvin. The boat is now being marketed and sold as the Nacra A2.

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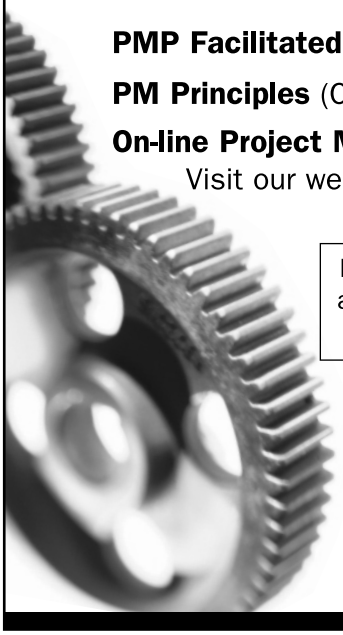

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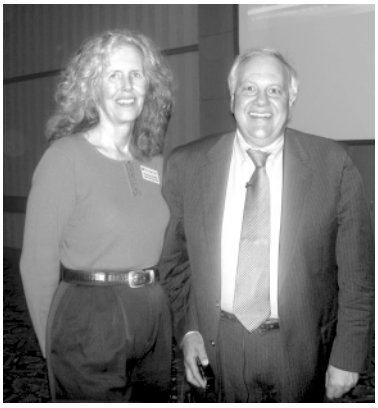
April Meeting Review

How to Attain Project Success

*Presented by **Tom Mattus***



*Dinner Meeting Chair **Pia Nielsen, PMP** with guest speaker **Tom Mattus.***

Successful Strategies International (SSI) was established ten years ago to meet the need for time and cost effective training and mentoring in the business world. Its goal is to enable organizations to target project management training for faster and cost effective results.

Tom Mattus, President of Successful Strategies International, brought many stories from client situations. Tom's presentation focused on achieving project success by establishing the right project drivers and priorities, and correctly measuring progress. For example, the CIO of Wyeth wanted his project managers to be trained and certified as PMPs. The CIO wanted to manage risk on projects and minimize errors and any chance of project failure.

Tom cited a study published in 2003 by the Standish Group that reported on over 13,500 projects across a broad spectrum.

Of these,

- 35% of projects succeed while 15% fail.
- 51% are "challenged."
- 43% overrun costs.
- 82% overrun schedules.
- 52% of required features and functions never made it to the release of the product.

These numbers are not encouraging! Project failures cost the private and public sectors billions in resources. PMI® has been around for a long time; why do we still see such poor project performance? Tom believes the top two reasons are:

1. **Not adequately defining the objectives for the project and what performance criteria define success.** It is critical to define up front the project requirements and what constitutes success and failure. The objectives and the plan need to be realistic. We are familiar with "triple constraints" for a project. SSI uses the "SSI Square" to look at project drivers and priorities: Scope, Schedule, Quality, and Cost. Based on the drivers and priorities, determine how success and failure will be measured. The drivers and priorities vary by project. Tom cited the example of a textbook publisher where schedule is the main driver. A drug company preparing a new product is also schedule driven, but the clinical research organization (CRO) that tests the drug is quality driven.
2. **Not adequately defining the "value system" and "measurement system" to track those project objectives**. Some of Tom's clients think having a Six Sigma framework in place is enough. However, a project needs project management processes and measurements, not just Six Sigma QA processes. The project management measurement system must include:
   - **Status.** What is happening? It is important to be very clear and concise in all project communications.
   - **Progress.** What is the situation compared to the plan for scope, schedule, quality and costs? Measurement is required to capture project performance and value achieved over time. PMs must be empowered to manage within the defined thresholds for project drivers.
   - **Forecast.** The forecast needs to be flexible and reality based and realign with changing business conditions. The PM must have the **courage** to give executive management a realistic view.
   - **Path Forward.** Course correction is mandatory when off target!

Project managers need to know and apply people skills, process skills, and be competent with tools and techniques. Tom cited J &J's project to launch their new product, Splenda. A team of 11 people from different departments were involved and were not working well together (ten men and the lone woman project manager). Critical meetings were not attended. Technical PM skills did not succeed in getting participation; feeding the team did! The PM managed to get everyone together and launch the product by creatively finding a way to engage the key resources; they sat down and discussed the project status over lunch.

Tom commented that the higher you go in an organization, the more interpersonal and "soft" skills you need, not greater technical knowledge. Education, and application of what you learn, is an important key to project success.

Barbara Ansell, PMP

***Above, left to right:** Dinner meeting attendees discuss the presentation and have a good time; representative from Management Concepts, April vendor showcase.*

***Above, center:** Tom Mattus makes a point.*

***Below:** Attendees gain insight from Tom's presentation.*

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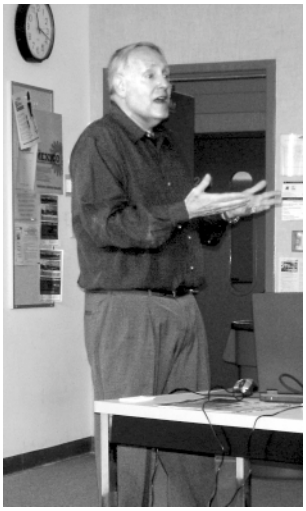

April 2, 2005: The exciting and magical topic of **Schedule Risk Analysis** brought out over 35 PMI-OC stalwarts early on a pleasant Saturday morning to hear about the application of statistical methods for analyzing schedule risk. Many of us came because we know the value of **Dr. David Hulett's** message about applying the appropriate methodologies to the development of complex schedules. Others came out of curiosity or just to earn PDUs. Based on the reception, we all came away with our needs well met.

David took us through the issues demonstrating that even a well prepared schedule will not result in the most likely completion date. A schedule risk analysis is needed to answer the key questions. (1) How likely am I to overrun my time objective? (2) How much time contingency do I need? (3) Where is the time risk the greatest in my project?

There were two major topics. First were the need for, and methods of, conducting a schedule risk analysis, and in the last hour, the use of an integrated cost/schedule risk analysis methodology.

A significant number of projects miss their key milestones, including the end dates, by large amounts. David covered the major reasons for schedule risk, including:

1. Fundamental uncertainty in the work to be performed,
2. Unrealistic baseline schedules (often forced on the PM by management/clients),
3. Natural causes: war, weather, etc.,
4. Project complexity and interproject dependencies,
5. Scheduling abuses (often caused by the software logic or lack of logic),
6. Relying on participants outside the organization (other operating departments),
7. Subcontractor and vendor problems,
8. Design changes,
9. Customer issues, and many others.

The primary objectives of developing a schedule risk assessment are to improve the accuracy of schedule dates, establish contingencies, and identify and monitor changing schedule risks.

David spent a good deal of time showing the group the various tools used to assist in the development of schedule risk analysis, such as MS Project and Excel support tools, including Risk Plus, At Risk, Crystal Ball and PERT Master. The primary thrust of much of the morning's discussion was the use of Monte Carlo analysis to evaluate the statistical probability of meeting various end dates. David talked about the importance of developing robust summary schedules for running the Monte Carlo solutions. He recommended some including between 50 and 200 activity type schedules at the summary level for a multi-thousand event project.

David led a lively discussion exposing the fallacies of reliance on project managers alone to manage the critical path. David showed us how a high risk path through the schedule will often become the surprise real critical path. Some of the techniques shown would allow us to identify these paths early enough in the project to build mitigation schemes. We all had a good chance to review our statistical knowledge with a discussion on both single path and multiple path networks and the statistical impact of merge points and merge bias. David strongly recommended the use of simulations to analyze the most likely and worst case schedules. The use of these methods would allow project teams to determine the times, based on management needs, that would allow for a higher confidence level for delivery.

Some of the difficulties discussed involved obtaining a true picture of project risk from the various stakeholders. David walked us through the methodology for doing a project risk interview. Other statistical issues that were discussed included:

- Probabilistic versus deterministic
- Common cause versus special cause variations
- Conditional branching

The final topic was a look at an integrated cost/schedule risk analysis method. David showed us how to calculate the impact of schedule and cost variations.

Those of us in the audience who also teach various project management courses were astounded by David's ability to deliver 137 slides with a slight late start, (because of late sign-ins), sufficient breaks, lots of questions, and still complete the presentation at exactly 12:00 noon. This was a great example of good scheduling under uncertain conditions.

Martin Wartenberg
martin.wartenberg@att.net

For those who missed this session, **David Hulett** encourages you to sign up for his class at UCI on Advanced Scheduling and Schedule Risk Analysis coming up in two weeks at the UCI OC Learning Center.

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A PMI-OC Success

Advanced Topics Seminars are productive, successful and appreciated. Advanced Topics Seminars (ATS) are not only diligent in providing information, they are also diligent in gathering information. Between feedback forms, periodic surveys and careful assessment of attendance data, we feel sure that this is one of the most popular offerings from PMI-OC.

Started by **Frank Parth, PMP**, nurtured and expanded by **Cornelius Fichtner, PMP**, attendees enjoy the depth and discussion of topics in the Advanced Topics Seminars. The seminars present more information than the dinner meetings since there are four hours available, not just one. There is more time for discussion and a great chance to get to know people and to hear their ideas.

Frank Parth wanted to do something for the advanced members to give them more detailed information about topics of interest, so he created the idea of an advanced topics seminar, and the board approved it. He reasoned that the four hours it would take to go into real depth automatically made this a weekend meeting rather than something in the evening.

From the beginning the only rules Frank had for the meetings were:

- The topic had to be interesting to our experienced members;
- No product marketing by any vendor giving a talk would be allowed;
- It would be inexpensive (four PDUs for $25);
- We would provide food, caffeine, and carbohydrates to get us through the morning.

Dr. David T. Hulett, our April presenter, said he always appreciated the intensely professional atmosphere and the people who came to the seminars specifically to learn. Very few people seemed to be there just for the PDUs. David also said he believed they were mature project managers. The longer forum with time for discussion appears to him to be the best environment to present some ideas that may be new and challenging. The questions and comments are good to enhance the experience for him and for all attendees.

David has often given his project risk management presentations at conferences. It takes time to give attendees some in-depth background in that subject and to introduce them to a way to get more accuracy in their scheduling with new techniques. He finds the Advanced Topics Seminars are good vehicles for this type of presentation.

David does not just participate as a presenter; he particularly enjoyed hearing **Vladimir Liberzon** speak on project scheduling. David said, "Vladimir is from Russia, and it was a real treat to see him again and to hear in detail what his Spider project does with scheduling, particularly with resources."

Cornelius Fichtner became involved with the Advanced Topics Seminars soon after joining the chapter. At first, he helped with the check-in at the door. Then, he brought the refreshments. Soon, he started running the seminars when Frank Parth was out of town. When Frank decided to step down because of the demands of his business, Cornelius became the driving force behind the seminar series.

Cornelius says, "I simply enjoy putting the seminars on and seeing the bright faces of the attendees when they learn something new. It's a thrill to see how much people are enjoying my work. It's almost as if I am teaching the seminars myself." He also appreciates the visibility within the chapter. "This is a great forum for networking as well."

Looking at the seminars in a new way, Cornelius suggests it is a great opportunity for a "beta seminar," meaning that the speaker can use the group to give the presentation for the first time to gauge how the approach works.

Sue Thompson, PMP, a frequent attendee at the seminars, said she started going for the PDUs. It was an opportunity to get PDUs without having to take time off from work, and the price was not very expensive. Now, she appreciates that four hours allow a deeper exploration of a subject than a one hour dinner meeting presentation. She too has made good networking contacts during the breaks and has gotten to know people she hadn't met at dinner meetings.

Under Cornelius' direction, the Advanced Topics Seminars are consistently outstanding presentations. They are enjoyed by those who present, attend, and volunteer.

The seminars are held the first Saturday of each month. The upcoming May 7th "Project Management Using Both Sides of Your Brain" and the June 4th "Managing Outsourced/ Offshore Software Projects" are both topical and timely. Check for more information on these seminars.

It is a good chance to learn about a topic in depth, meet new people, network and have fun. Refreshments are still provided; we still follow Frank's rules.

Lora Lockwood, PMP

Test Your Knowledge on PMP® Exam Questions

1. There are several cost forecasting techniques called Estimate at Completion (EAC). The one most used, when current variances are seen as typical of future variances, is:
   a. EAC = AC + BAC – EV
   b. EAC = BAC/SPI
   c. EAC = AC + [(BAC – EV)/(CPI)]
   d. EAC = AC + ETC

2. A numbering system used to uniquely identify each element of the work breakdown structure is called:
   a. The code of accounts
   b. An activity list
   c. A control account plan
   d. The chart of accounts

3. The purpose of progress reporting is to:
   a. Describe what the project has accomplished
   b. Describe where the project now stands
   c. Forecasting the outcome of the project
   d. Integrate cost and schedule metrics into a single report

4. The sole input in the Contract Closeout process is:
   a. Define procedures by which the cost management plan is changed
   b. Payment requests
   c. Final seller invoices
   d. Contract documentation

Answers are on page 15

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COMING EVENT

Advanced Topic Seminar: Managing Outsourced / Offshore Software Projects

Are you considering offshore projects? Do you want to select the "right" project? Learn how and gain valuable PDUs.

Outsourcing of software development to offshore centers has become the normal method in many industries to reduce the cost of software development and maintenance. The key driver for outsourcing developments is lower wage costs in candidate countries and a perceived shortage of software talent in the U.S and Western Europe.

The offshoring trend has moved from the relatively simple tasks including coding, testing and software maintenance to system level new product development. In order to obtain the full benefit of outsourcing to India, China, Canada, Eastern Europe and other Asian nations that have been competing in the software arena, there are certain key aspects that you must know before jumping in and sending development jobs half way around the world. This seminar will deal with the first three key issues related to the offshoring decision.

1. What types of projects are most suitable for outsourcing/offshoring?
2. Which of the current business models is most suitable for your organization and project?
3. Some consideration as to which country to select for your offshoring venture.

Upon completion of this Advanced Topics Seminar, you will be able to a) properly select good development candidates for outsourcing, b) understand the various offshoring development models, c) be able to select the appropriate development model based on your organization's specific maturity and needs, and d) gain some understanding of the strengths and weaknesses of the various countries currently engaged in providing offshoring support.

Presented by Martin Wartenberg

Date:	**Saturday, June 4, 2005**	**Register:**	www.pmi-oc.org
Time:	8:00 a.m. to 12:00 p.m.	**Questions:**	advancedtopics@pmi-oc.org
Location:	Santiago Canyon College 8045 E. Chapman Ave Room D-207 Orange, CA 92869	**PDUs:**	There are four PDUs for this event.
		Cost:	$25 for PMI members $30 for non-members

Tools and Techniques

for the Project Manager in a Weak Matrix Organization Part 1

By Cornelius Fichtner, PMP

The PMBOK® Guide defines a weak matrix organization as an organization where the project manager's authority is limited; a maximum of 25% of resources are assigned full-time to projects; the project manager's role, as well as the administrative staff, is part-time; and where the project manager is most likely called project coordinator or project leader (PMBOK® Guide 2000, Figure 2-6, page 19).

Many project managers define it as "the sorry place I'm in."

I too work in a weak matrix organization, but I like it here because I have learned to make it work for me! In this article, I will outline the tools and techniques I have developed that will help you make working in a weak matrix organization not just "survivable," but fun. After all, you spend eight hours there every day; it ought to be fun, right?

The most important technique for success is to take notes. All it takes is a notebook and five minutes of introspective note-taking in the morning. Write down the good, the bad and the ugly, what you have learned from them and how you will either stress or avoid them in the future. These notes will become very valuable the day you finally find that "real" job. Then you can go back to your notes and use the wisdom within to make your project work. The notes are also great for anecdotes at parties, e.g., "Now let *me* tell you about this one company I worked for, where . . . ," or for writing articles like this one.

While these techniques will help you prepare for the future, here are those which will help you today.

The Columbo

This is a technique that I perfected several years ago when I was working as a junior project manager in a weak matrix organization. My boss had a tendency to want it his way. He was constantly giving me very detailed instructions for my projects. I walked away feeling very micromanaged and powerless. Sounds familiar? Read on.

I kept thinking to myself, "I wish I had said this or that to him," or "If only I had known this fact sooner, I could have argued my case better." After a while this got old, so I did what Inspector Columbo does best; I returned to the suspect. Meetings were still dominated with my boss' "management by shooting from the hip" and me walking away with an annoying set of instructions. The next day however, I stuck my head back in his office saying, "Boss, you know . . . about what you said yesterday that three weeks is enough to implement SAP, and that I need a *can do* attitude? It's the funniest thing, but I have read that it normally takes companies at least four weeks to pull this one off."

As long as I can keep this article out of the hands of everyone I will ever work for, I will continue to be able to win my wars in this fashion. It's because no matter how "hands on" the line managers in power are, they are usually open to your arguments. They will not turn you down if you make sense and show them that your way has a much better chance of making *them* successful. Oh, and a good night's sleep on their part helps too.

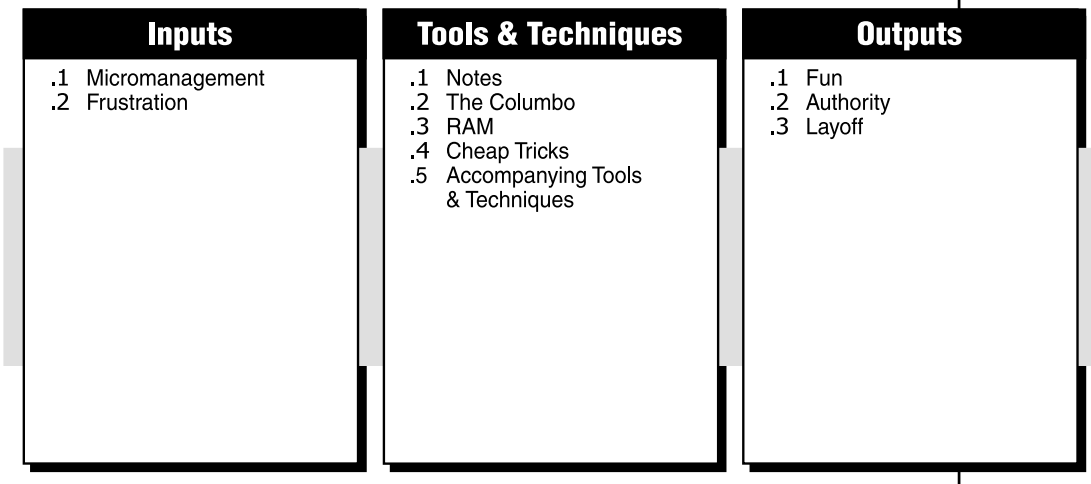
And in case you were wondering; yes, I would have liked to bring this technique into the 21st century by renaming it "*The I'll Be Back Schwarzenegger,*" but the editor of this article won't let me. I guess I'll bring it up with her again tomorrow . . .

Give Them Something to Manage

The line managers in a weak matrix organization are used to running the show, and if you don't let them run the show, they will walk all over you. Try fighting their decision making power and you will find that they will manage everything about your project including the Dilbert cartoons in your war room. The important tactic here is to ensure that you try to manage the decisions they are allowed to make as best as you can.

The tool I have developed for this is the RAM, which stands for Relinquish All Micromanagement. By a strange coincidence, it looks exactly like the Responsibility Assignment Matrix (also RAM) as shown in Figure 9-2 on page 111 of the PMBOK® Guide. Activities are listed in the leftmost column of the matrix, and various levels of responsibilities (i.e., accountable, participant, reviewer etc.) are assigned to the project stakeholders named in the columns on the right. Though the resemblance between the two tools is suspicious, I will refrain from suing the PMI®.

Filling out a RAM to get the line managers to relinquish all micromanagement requires that you have worked with them on at least one previous project. During this project you will have learned the managers' styles. You know where they will try "helping" you in your project by giving you in-depth instructions. Wherever possible, assign these responsibilities to yourself. You decide that vanilla ice cream will be served at the launch party; they can decide which supermarket it comes from.



Continued on page 14

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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 **programs@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**.

Tools and Techniques *Continued from page 14*

As you are filling out the RAM, try not to get carried away and end up having every task assigned to you. Remember that the line managers are ultimately your customer. Like it or not, you are managing the project to deliver a solution not for yourself, but for the line managers. Their departments have to "live with" the solution you deliver. Their micromanagement may not just simply be a bad character trait, but a sincere and honest attempt to get the best solution possible. No RAM will ever help you here. Only a thorough understanding of your customer's needs can help. Show them that you understand what they need and that you are creating a solution to their problem. Then they will likely back away and give you the freedom you seek.

However, no matter how many decisions you are able to pull your way with a RAM, you still need to make sure that people know that you are the person in charge.

So here are . . .

A Few Cheap Tricks to Establish Your Authority

My favorite and most enjoyable technique to establish my authority as the project manager is to arrive at project meetings early and sit at the head of the table. I get a devilish pleasure out of seeing that wonderfully flustered look on the line managers' faces as they walk in the door and notice that seat number one is already taken. "Come on in and sit down," I say and wave my hand at the "lesser" seats. After all, the seating order defines who runs the show, and we are taking full advantage of it.

There is another reason to arrive early, and that's handing out the agenda. If you need to establish your authority in a project, then the agenda, *your* agenda, is a must. In the header, identify clearly that this document was prepared by you for the other participants. Place one in front of every seat except, of course, in front of the seat at "the other end" of the table. People tend to sit down where the agendas are and if there is no agenda at the opposite end, no one will sit there thinking that they, and not you, are at the head of the table. I have even gone so far as pushing the chair at the other end into a corner. But that was close to pathetic.

Next on the agenda: speak first and welcome the participants almost immediately after the last person has arrived. Strangely enough, now that you have secured the chief seat, defined the agenda and uttered the first official words, people will follow your lead because you *seem* to be in charge.

Outside of meetings, introductions are another area where you can establish your authority. Always begin a phone conversation, e-mail or project presentation with an appropriate statement of your authority. "Hello. My name is Cornelius Fichtner, and I am the project manager of XYZ project." Of course, I don't mean every single phone call you make. Your pharmacist doesn't really care. But the marketing manager whom you have not met before does. However, please use your own name and not mine. And when you call her again next month regarding another project you are managing, don't forget to refresh her memory. "I not only manage project XYZ, but I am also the project manager for ZYX, and I was wondering if I could talk to you about that for a moment."

There is No Such Thing as a True Strong Matrix Organization

If you use my tools and techniques, two things will happen. You will have more fun at work, and you will increase your authority within a weak matrix organization. Some of them might even get you fired. As you are using them, you may find a tendency to look across the fence to the strong matrix organization where the grass seems greener. At that moment, consider this: there is no such thing as an unchallenged strong matrix organization. Every project manager is faced with a weak matrix somewhere in the organizational structure of the project. There is always "that special someone" who will tell the project manager exactly what to do: the customer, the CEO, the program manager or the mother in law. The question is how you let the weak matrix you are faced with affect your project management style.

And always remember that no matter how annoying the situation feels today, it will be funny in five years. So do take notes.

To be continued in June

PMI-OC Dinner Meeting

Tuesday, May 10, 2005

Program: **Running a PMO in a Decentralized Organization**
Presenter: Ken Taylor, VP Project Management Office, Ameriquest Mortgage
Vendor Showcase: SemanticSpace Technologies

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: **Dinner and Presentation**

In Advance:		*At the Door:*	
Members	$25.00	Members	$40.00
Non-Members	$35.00	Non-Members	$40.00

Presentation Only (Members and Non-Members)

In Advance:	$10.00	*At the Door:*	$15.00

Please register at www.pmi-oc.org. You can pay by credit or bank card in advance or by cash, check, or credit card (Visa or MasterCard only) at the door.

Make your reservation by 9:00 p.m., Sunday, May 8, to obtain the "in advance" price. Reservations made after 9:00 p.m., Sunday, May 8, 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 their reservations after Sunday, May 8, or members and non-members who make a reservation and do not attend the meeting will not receive any refunds.

PMI-OC Breakfast Meetings

PMO-Local Interest Group (LIG) Breakfast Roundtable

Tuesday, May 17, 2005

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-Central OC Breakfast Roundtable

Tuesday, May 24, 2005

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 **breakfastnorth@pmi-oc.org**

Cost: Self-paid breakfast, parking is validated

PMI-OC Breakfast Roundtable South

Tuesday, June 7, 2005

First Tuesday of Every Month

Location: **Doubletree Hotel Irvine Spectrum**
90 Pacific Avenue, Irvine (405 and 133 Freeways)
949-471-8888

Time: 7:15 – 9:00 a.m.

Register: Send your e-mail reservation to Thomas Sippl at **breakfastsouth@pmi-oc.org**

Cost: Self-paid breakfast

NEW MEMBERS

Continued from page 2

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Robert Schirripa
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Dipti Seth
Keane, Inc.

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Andrew Todd
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Ameriquest Mortgage

Rashida Vakharia
AmerisourceBergen

Michael Weir
Boeing

Henry Winters
Ameriquest

Kevin Young
FutureTrade Technology

Robin Ziegler
PacifiCare

Total New Members	**44**
Total PMI-OC Membership	**1,420**

Answers to PMP® Exam Questions

From page 11

1.c. EAC = AC + [(BAC – EV)/(CPI)]
PMBOK® 2000, paragraph 7.4.3.4, [Controlling]

2.a. The code of accounts
PMBOK® 2000, Glossary, page 199 [Planning]

3.a. Describe what the project has accomplished
PMBOK® 2000, paragraph 10.3, [Controlling]

4.d. Contract documentation
PMBOK® 2000, paragraph 12.6.1.1 [Closing]

PMI Orange County MILESTONES
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Coming Events

LEGEND
- PMI-OC Event
- PMI® Event
- PMI-OC Corporate Sponsor Event
- PMI-OC Sponsored Event

MAY 7 ADVANCED TOPICS SEMINAR
Project Management Using Both Sides of Your Brain
Speakers: Barbara Ansell, PMP and Michelle Saykally, PMP
Location: Santiago Canyon College

MAY 10 DINNER MEETING
Running a PMO in a Decentralized Organization
Presenter: Ken Taylor, VP, Ameriquest Mortgage
Vendor Showcase: SemanticSpace Technologies

MAY 11-13
PMI® PERFORMANCE MANAGEMENT INTERNATIONAL CONFERENCE
Long Beach, CA

MAY 14 SPRING PMP® EXAM PREPARATION WORKSHOP BEGINS
Santiago Canyon College and Doubletree Hotel, Irvine Spectrum

MAY 17 BREAKFAST MEETING
PMO-Local Interest Group (LIG) Breakfast Roundtable

MAY 18 PMI-OC CAREER NETWORKING GROUP
Location: 40 Plus of Orange County

MAY 24 BREAKFAST MEETING
Central Orange County Breakfast Roundtable

JUNE 4 ADVANCED TOPICS SEMINAR
Managing Outsourced/Offshore Software Projects
Speaker: Martin Wartenberg
Location: Santiago Canyon College

JUNE 7 BREAKFAST MEETING
PMI-OC Breakfast Roundtable South

JUNE 11-14 PDS '05
Annual ISSIG Professional Development Symposium
San Francisco, CA

JUNE 26-28 PMI REGION 14 – 2005 SYMPOSIUM
Atlanta, GA

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