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2007 CHAPTER BOARD

Cornelius Fichtner, PMP
Chair/President
949-932-1472
chair@pmi-oc.org

Victoria Flanagan
Chair-Elect
949-888-2839
chairelect@pmi-oc.org

Kim Fields, PMP
Director at Large
562-712-8255
atlarge@pmi-oc.org

Lora Lockwood, PMP
Finance Director/Treasurer
562-426-2919
finance@pmi-oc.org

Francis Amalraj, PMP
IT Director
949-232-2438
it@pmi-oc.org

Brent Felsted, PMP
Marketing Director
714-892-5699
marketing@pmi-oc.org

Sylvan Finestone, PMP
Membership Director
714-612-1550
membership@pmi-oc.org

Beth Williams, PMP
Operations Director/Secretary
949-637-5574
operations@pmi-oc.org

Pan Kao, PMP
Programs Director
562-882-8829
programs@pmi-oc.org

Volunteer Opportunities
Volunteer@pmi-oc.org

Advertising Opportunities
Advertising@pmi-oc.org

MARCH 13TH PMI-OC DINNER MEETING



Using EVM Light As a Start On All Projects

Quentin W. Fleming, PMI-OC Fellow

The United States Government and many private companies are starting to require earned value management in accordance with the American National Standards Institute's ANSI/EIA-748 issued in 1998.

At the upcoming PMI-OC dinner meeting, Quentin will present a brief overview of ANSI 748 and then describe what he feels is a scalable (but solid) start on the earned value process.

Quentin W. Fleming is an independent consultant and instructor at the University of California, Irvine, where in 1995, he developed two new courses, both required components in UCI's project management certificate series.

Quentin served on the eight person "core team," which updated and released the PMBOK, Second Edition, issued in 2000.

Earlier in his professional career, Quentin served as the Peace Corps director for both Iran and Bahrain. He and his family were sent to Tehran, Iran where they lived for two and a half years before he closed out the Peace Corps mission in 1976.

Quentin has worked with EVM since 1970, and in 2005, he was named a PMI-OC Fellow, the chapter's highest honor.

March Vendor Showcase:
Project Insight
www.projectinsight.net
See ad on page 4.

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## Victoria Flanagan Named Chair-Elect

The 2007 PMI-OC Board of Directors would like to announce that **Victoria Flanagan** has been appointed to fill the vacant chair-elect position. By unanimous vote, the board chose Victoria to fill the empty seat.

Victoria has contributed significantly to the success of the chapter since she joined in 2002. As the VP of Corporate Relations in 2003 and 2004, she created standards for marketing, logo usage, and press releases. Furthermore, she identified the need to update the PMI-OC chapter logo to align it with PMI® graphic standards and managed its re-design, resulting in a more professional image, market differentiation from other Southern California PMI chapters, and cost savings on logoware embroidery.

Victoria also held the position of Director at Large for two years in 2005 and 2006. During this time, she established and staffed the Executive Advisory Council, while also creating and managing PMInAction 2005, PMI-OC's first conference.

Victoria is currently an independent consultant, working with smaller businesses and several start-up companies. The majority of her experience has been with Accenture (formerly Andersen Consulting).

As Chair-Elect for 2007, she will work aggressively to support new board members in their transitions and help the chapter achieve its 2007 objectives, advancing toward the new three year vision.

In accordance with the chapter by-laws, Victoria will not automatically become the chapter chair/president in 2008 since she was appointed to this position. The bylaws require that an appointed chair-elect be confirmed as chair/president by the membership at the annual election.

Welcome aboard, Victoria!

**2007 PMI-OC Board of Directors**



## What Have You Done for Me Lately?

In the first two *Milestones* columns of this year, I talked about the strategic direction that the board of directors is taking, as well as the projects that have been launched. In January, I discussed how we are planning to lead the way to 2010, and in February I showed how we will let the new PMI® Code of Ethics guide us and make the chapter even stronger than it is today. You may have read these columns and thought to yourself, "That's nice. But what have you done for me lately?" Actually, we have done quite a lot, and this is what today's column is all about.

First let me draw your attention back to the front page of this *Milestones*. If you look closely, you will notice one major difference from last month's copy. The board of directors is proud to announce that **Victoria Flanagan** has been appointed chair-elect. Please take a moment and send your congratulations to [chairelect@pmi-oc.org](mailto:chairelect@pmi-oc.org) and welcome her. Victoria's past experience on the PMI-OC Board of Directors makes her an invaluable resource for the years to come. For more on this appointment, please see the column at the left.

But let's come back to you and what we have done for you lately. When you looked at the front page just now, did you happen to notice the purpose statement at the bottom? It reads "Providing Members Quality Professional Development and Networking Opportunities." In my opinion, this statement is what PMI-OC is all about. Everything that we do has to support our ability to provide you these kinds of opportunities. And yes, the goal of our strategic projects is to build an infrastructure that will be able to support our members in this respect several years down the road.

In the last 12 months, PMI-OC has announced 69 events on its website and processed more than 2,500 event registrations. That is quite a staggering number for a volunteer organization.

Our primary event is, of course, the monthly dinner meeting, where so much networking is going on that I have to shout to be heard, and I'm the one with the microphone. Our speakers always deliver challenging and entertaining topics from the world of project management. We provide the same quality of speakers to you at our monthly advanced topics seminars and enable you to network in a more intimate setting at our monthly SOX breakfasts. If you are new to PMI-OC, then you might want to attend the bi-monthly member/volunteer orientation training session. This event is not only your opportunity to network with other new members, but will also show you how you can get involved as a volunteer.

Our latest offering is the PMI-OC Leadership Institute where **Dr. Jerry Brightman** challenges the attendees to explore and develop their leadership potential. In April you will have the opportunity to attend the PMI-OC sponsored **Neal Whitten** seminar titled "No-Nonsense Advice for Successful Projects," and we are all looking forward to another successful one-day Southern California Coalition Technology Conference in August.

Let's not forget our PMP® workshops, which have helped so many of us attain our PMP certifications. **Mike Graupner**, PMP and his team have done an incredible job building one of the best PMI component managed PMP workshops around. But, that just wasn't enough for them. Starting later this year, PMI-OC will offer not only concurrent classes in Laguna Hills and Costa Mesa, but will add Brea as a third location. This may not seem significant to you if you are already PMP certified. But did you know that you can take this class as a "PMBOK Guide 2004 refresher" and claim over 40 PDUs?

And that is what we've done for you lately!

**Cornelius Fichtner**, PMP, Chair/President  
*He who gives great service gets great rewards.*

# 2007 PMI-OC Membership Team

This month, I would like to introduce your new membership team – the organization that will guide all of our membership efforts this next year.

Our new volunteer coordinator, **John Sunderson, PMP**, will work with our new and current volunteers. His job is two-fold; one is to identify and maintain our volunteer population, while attending to the volunteers' needs identified by our board of directors and other committee chairs. In addition, John will support our Volunteer of the Month, Volunteer of the Year, and the Spark of Love activity programs. As our key volunteer contact, John should be the first stop in your volunteering, both for new and continuing members.

Heading our Ambassador Program is **Barry Whitesides, PMP**. While Barry is new to the organization, he has accepted the responsibility to organize, train, and mentor our ambassadors. These volunteers are key because they represent the organization to new members and visitors. When the opportunity arises at a dinner meeting, chapter event, or even a training session, the ambassadors are there to help new members by identifying opportunities in our organization and making introductions to new or continuing members.

**Joe Paradiso, PMP** and **Terry Hauser** are currently managing the Membership Tracking and Retention Committees. They are planning and executing our Member/Volunteer Orientation Training, held every other month. This is the opportunity for our new and continuing members to learn more about PMI-OC and the benefits the chapter can offer. Included is an overview of PMI®, PMI-OC, volunteer opportunities and a networking skills seminar for members in transition. This area is going to expand with greater focus on member retention.

In the Survey Committee, **Nora Goto, PMP** leads both our monthly metrics and the annual membership survey. This is truly one of those back-room activities that requires enormous analytic ability to accurately re-work data into our required metrics. The membership survey is structured with feedback from the board and is then distributed for member input. Once received, the results are tabulated and included in our visioning sessions to determine our three-year annual plan, set by the board.

**Sylvan Finestone, PMP**

## VOLUNTEER OF THE MONTH

### Roger Lew, PMP

The PMI-OC Board of Directors unanimously selected and recognized **Roger Lew, PMP** as Volunteer of the Month for February 2007. **John Sunderson, PMP** and **Sylvan Finestone, PMP** honored Roger at the February dinner meeting by presenting him with a certificate of appreciation.



Roger joined the chapter in April 2005, and he earned his PMP® Certification in September of that same year. Encouraged by fellow chapter member and good friend, **Linda Wilson, PMP**, Roger decided to expand his horizons by becoming more active in PMI-OC. In March 2006, he began his volunteer experience by attending the new member orientation and volunteer training sessions at UCI, where he was enthusiastically recruited by then volunteer coordinator **Sylvan Finestone, PMP**. In April 2006, he began volunteering with the marketing team led by **Brent Felsted, PMP**.

Later in 2006, he worked as an assistant editor to **Naomi Iseri, PMP**, the *Milestones* editor. He served as backup editor when Naomi was on vacation. When opportunity knocked this past fall, Roger stepped forward and accepted the position of *Milestones* editor. Roger has already made improvements to the newsletter and will continue to do so in the coming months with the help of his very capable and talented assistant editors.

Roger is currently an IT Project Manager at 99¢ Only Stores. His biggest challenge is to manage projects that locate great deals on products and expedite their availability to consumers. 99¢ Only Stores is a unique, deep-discount retailer of primarily name-brand and consumable general merchandise, where no item is over 99¢ – ever!

## Volunteer Opportunities

### Dinner Meeting Host

The host for the dinner meeting introduces the event, speakers, and makes special announcements as specified in the meeting agenda. Seeking a public speaker who has the required presence to host a large dinner meeting. Contact **Programs Director Pan Kao**.

### PowerPoint Coordinator

Creates automated PowerPoint presentations from various sources, including *Milestones*, and directs input, including new members and new PMPs, to display at PMI® events. Contact **Programs Director Pan Kao**.

### Hotel Coordinator

Monitors guest counts prior to the meeting and communicates information to the hotel. Ensures that all paying members receive meals. Collects business cards and assists with the raffle. Contact **Programs Director Pan Kao**.

### Milestones Contributors

*Milestones* needs six additional volunteers to attend events, take notes, and write 500 to 1,000 word reviews for the chapter's newsletter. Good communication skills are required. PDUs awarded for published articles. Contact **Marketing Director Brent Felsted**.

### Raffle Coordinator

Purchase raffle prizes and bring them to the dinner meetings (\$50 per meeting maximum). Assist with the raffles during the dinner meetings. Contact **Programs Director Pan Kao**.


### Track PDUs for the Chapter

Assist the volunteer chair in tracking the PDUs earned and reported by the various directors. Contact **Membership Director Sylvan Finestone**.

### Technology Coordinator

Maintain and set up the microphones for the dinner meetings. Work with the hotel staff to utilize existing sound systems in the hotel. Contact **Programs Director Pan Kao**.

### Marketing Plan Project Manager

Work with the marketing team to create the marketing plan for PMI-OC for 2007 and beyond. Requires interview skills with the ability to turn findings into documentation for team review and execution. Contact **Marketing Director Brent Felsted**. 

Roger was attracted to 99¢ Only Stores because of their profitable business model and because he loves to shop in their stores for bargains.

Roger is very excited about the PMI-OC chapter. He feels good about the course the board of directors has set for the chapter in 2007 and is looking forward to a rewarding year serving the membership of PMI-OC.

The board recognizes the contribution that Roger has made and thanks him for his dedicated efforts.

**John Sunderson, PMP**



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## Four Rules for PMs How to Successfully Implement a Large IS Project

**Philip E. Quigley, CFPIM, PMP** has an interesting style.

- He's seen both success and failure and is willing to talk about both.
- He is blunt, outspoken, and forthright.
- He's ready to find a new job and ready to recommend that same step to his fellow PMs.

From his experience, he shared four rules for successful implementation. While these rules were centered around a large IS project, much of what he said is solid advice in any project management area.

**Rule 1: Have clear, measurable goals.** Things like "reduce accounting head count" are clear, but not measurable. Things like "develop a cost effective strategy" are not clear. What you want are things like "reduce accounting head count by 20 percent." Once your goals are clear and measurable, they must be agreed to at all levels of the organization.

**Rule 2: The project must have senior management support.** What kind of support? Phil gives us two items:

- Budget support. If they are not willing to spend the money, the project is not supported. Money means commitment.
- Political support. It's not just political power, but the willingness to use it, even in unpleasant situations. If your senior management actively and regularly participates in governance, it's much easier to get this.

And what if you don't get this support? Find a new job.

**Rule 3: Follow standard PM practices.** This implies you have a strong PM, someone who can successfully insist on following good project management practices. Such PMs are in short supply; they're not easy to pick out from the crowd. Here's what to look for:

- The PM should know it's a business project, not an IT project.
- The PM should know how to handle the politics.

Such a PM should also know what standard practices to follow. Phil was kind enough to identify what he considers the important ones; it's a familiar list:

- **Schedule.** Develop a good one; maintain it accurately, and manage it carefully.
- **Scope.** It is absolutely essential that all changes in scope be identified and acted upon quickly.
- **Organizational change.** There are going to be organizational changes as a result of any large IS project. The key is to plan for them. If you change someone's job, you can expect to get resistance. Plan for it. Without a plan to deal with organizational change, you are planning to fail.
- **Quality.** Every project has deliverables; most deliverables can be delivered incomplete. Have a plan to set quality objectives, measure quality, and deal with the results.
- **Budget and expenditures.** Not just the budget you are supposed to be making, but the actual expenditures. You may have to set up something outside accounting to do this; accounting reports often run a couple of months behind. That's too late for you to take appropriate action.
- **Risk.** The key here is to start with real risks, not just something to fill up your risk log. Monitor and report on them on a weekly basis.

**Rule 4: Take care of the people.** Begin with your communication skills, especially listening. If you don't know what your people are saying, you're missing something.

One reason we fail to listen is that our people are already working 80 hour weeks and don't want to enlighten the PM and wind up with another 20 hours a week. If you haven't the resources necessary to accomplish the project without this, see Rule 2.



There are simple items too. Things like facilities: do they have a desk to sit at, a PC (on the network) and a key to the wash room? Having those things isn't usually a motivator, but not having them costs much more than getting them. Training is another area; see that they get the training they need at the time they need it.

Team building is another often-neglected item. It's surprising what a lunch can do. Put this into the plan on day one; you won't have to "find the money" later.

Finally, rewards. Make sure that your people receive appropriate awards, whether financial (a bonus) or career (moving up a level). Rewards are important to team morale.

And if you can't follow these rules? Prohibited by the current circumstances? If senior management isn't willing to commit to the schedule, cost and deliverables, the strong PM is looking for another position.

Thanks, Phil!

**John Hendershot, PMP**



# At the February Dinner Meeting



**Above:**  
Checking in,  
socializing and  
networking before  
the meeting.

**Center:**  
Attendees enjoy  
dinner, welcome  
Phil Quigley, and  
congratulate new  
PMPs.

**Below:**  
February vendor  
showcase  
sponsor,  
DRMcNatty &  
Associates, Inc.



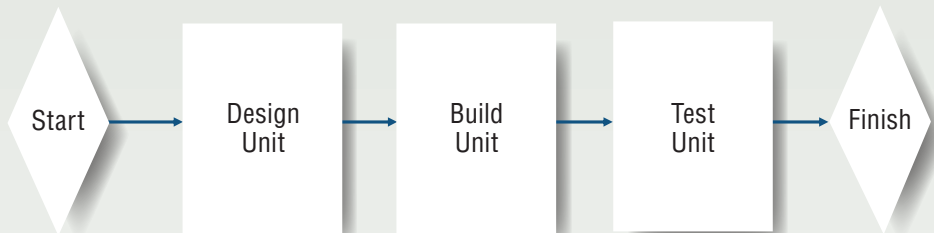
**PMI Orange County Chapter:**  
2006 Chapter of the Year,  
Volunteer Program of the Year,  
and Collaboration Award, too.  
Awards in three of five categories  
were claimed by you and your  
chapter in 2006.  
Way to go!!!

# Uncertainties in Task Duration and Cost Estimates Extend Completion Date and Total Cost of Project

**T**ake a task, say “Design Unit 1,” with an estimated duration of 30 days. Risk analysis and practical experience have shown that this task’s duration is most likely different and frequently longer. In any project, such a task is not alone, but a part of a contiguous schedule path. Just as this task has uncertainty in its duration, so do all the other tasks. If the duration of the path is uncertain, so is the completion date of the entire project. The same holds true for the cost of the tasks in the path and of the whole project.

With his lucid and eloquent presentation, **David T. Hulett, Ph.D.**, offered a truly advanced seminar on project risk analysis. Through practical examples, Dave showed how uncertainty in schedule and cost affect a project’s outcome. The cost and duration are no longer fixed and deterministic, but varying and probabilistic<sup>1</sup>. Simple schedules may be easy to deal with; however, complex ones require sophisticated numeric tools to quantify their uncertainties. On his laptop, Dave showed how these tools become the project manager’s powerful allies in analyzing and predicting project outcome.

Let us return to the example of the single task “Design Unit 1,” and let us assume that through interviewing the task performers, the PM has obtained the optimistic, most likely, and pessimistic estimates of 20, 30, and 45 days. To determine just how risky the duration of this single task is, we need one more piece of information: the probability distribution of the task’s duration. Let us consider next the analysis of the schedule risk along a simple contiguous path of three tasks, shown in the network diagram of **Figure 1**. If each of the task durations in this simple project is risky, we have no intuitive idea when the project will actually finish. Dave’s corresponding Microsoft Project data appear in **Figure 2** and **Table 1**. The burning question of course is, “When will this project actually finish?”



**Figure 1:** The risk along a contiguous schedule path is the combined risk of all the activities along the path. Numerical methods for combining the probability distributions of all activities allow the determination of the path risk.

ID	Task Name	Duration	Start	Finish	May	June	July	Aug	Sept
1	Project	95 d	6/1	9/3	[Gantt bar from 6/1 to 9/3]				
2	Start	0 d	6/1	6/1	6/1				
3	Design Unit	30 d	6/1	6/30		6/1 - 6/30			
4	Build Unit	40 d	7/1	8/9			7/1 - 8/9		
5	Test Unit	25 d	8/10	9/3				8/10 - 9/3	
6	Finish	0 d	9/3	9/3					9/3

**Figure 2:** Microsoft Project Gantt chart of a really simple schedule. It finishes on September 3, with seven-day weeks, as might apply to a model changeover or a refinery turnaround. Logically, PMs can get into trouble with this simple schedule; they can get into even more trouble with real project schedules.

ID	Task Name	Rept ID	Min Rdur	ML Rdur	Max Rdur	Curve
1	Project	2	0 d	0 d	0 d	0
2	Start	0	0 d	0 d	0 d	0
3	Design Unit	0	20 d	30 d	45 d	2
4	Build Unit	0	35 d	40 d	50 d	2
5	Test Unit	0	20 d	25 d	50 d	2
6	Finish	0	0 d	0 d	0 d	0

**Table 1:** Add duration risk to the schedule of Figure 2 with the risk analysis based on triangular probability distributions. The column headings MinRdur and MLRdur denote minimum and most likely remaining duration.

The mathematics of random variables tell us that simply adding the probability distributions for each task to find the total project’s probability distribution is incorrect. Rather, the probability distributions have to be combined, a horrendous undertaking.



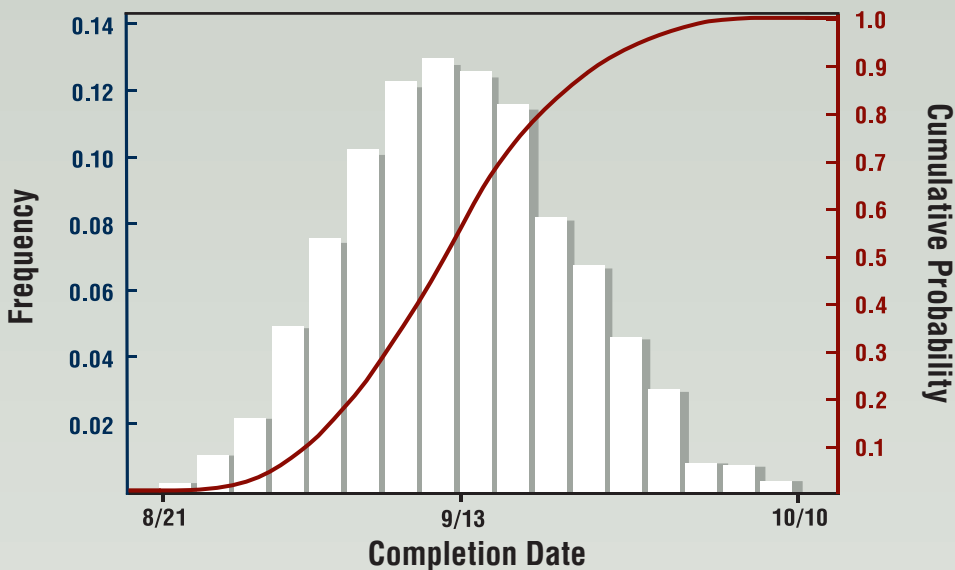
Numerical solutions are much easier. The easiest is to compute the combined project probability distribution through iterations of numeric simulations in which the project is “performed” many times over. Each iteration uses a different set of numeric values for the duration of each task, each value picked from the corresponding duration’s individual probability distribution. An infinite number of these iterations constitute the Monte Carlo analysis. This method is over 50 years old and, because it is very general, has found many applications.

In practice it is not feasible to “perform” the project infinitely. Some finite number of iterations will have to suffice. How many? That depends on the accuracy demanded of the results. For first-cut analyses, Dave deems 2,500 iterations sufficient, for analyses used in final reports he recommends 10,000<sup>2</sup>.

<sup>1</sup> That is, random.

<sup>2</sup> How useful the chosen iterations are depends on how closely the simulation approximates the project’s randomness. The method for a suitable selection of durations that yields best results is the stratified sampling method called Latin Hypercube. Its structure has turned out to be a good approximation of the complete randomness required by the Monte Carlo analysis. For this reason, a simulation with data selected by Latin Hypercube is in practice referred to as a Monte Carlo simulation.

*Continued on page 8*

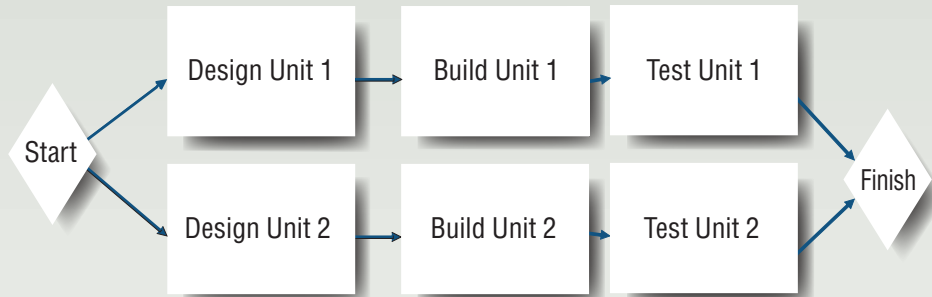


Completion Probability Table			
Prob	Date	Prob	Date
0.05	8/31	0.55	9/14
0.10	9/2	0.60	9/16
0.15	9/4	0.65	9/17
0.20	9/6	0.70	9/18
0.25	9/7	0.75	9/19
0.30	9/8	0.80	9/21
0.35	9/10	0.85	9/23
0.40	9/11	0.90	9/25
0.45	9/12	0.95	9/29
0.50	9/13	1.00	10/10

**Figure 3:** Monte Carlo simulation with 3,000 iterations of the schedule in **Figure 2** (on previous page) and the triangular probability distributions of **Table 1** (on previous page) yields the probability distribution for the project's completion date. The predicted most likely completion date (peak of the distribution curve) is September 10.

**Table 2:** Probable completion dates for the schedule of **Figure 2** (on previous page) appear with their likelihoods determined by Monte Carlo simulation. Note that the completion date of September 3 determined with the critical path method is only 15 percent likely to be met

**Figure 3** shows the results of the Monte Carlo simulation of the Microsoft Project schedule in **Figure 2** (on previous page) and the triangular distributions of **Table 1** (on previous page), performing 3,000 iterations. What is interesting here is that the deterministic completion date of September 3 (as determined with the critical path method of Microsoft Project) is only 35 percent likely to be met. For practical realism, Dave recommended to take the date that is 80 percent likely to be met, September 21.



**Figure 4:** Network diagram of a project with two merging paths. In real schedules, many parallel paths merge, each one having its own risk.

Let us next consider the more realistic network appearing in **Figure 4**. This network diagram shows a project with two merging paths. Clearly, the project's finish is driven by the slower of the two converging paths. As Dave went on to demonstrate, this path is not necessarily the one identified as critical by the critical path method. The same holds true for real-world network diagrams that have many converging paths; the path that finishes the latest drives the project's finish. In Dave's experience, most schedule risk emanates from such merging points. Because complex schedules have many parallel activities, a delay on any one path may delay the project. What is more, merge points such as date of project completion, date of major design review, and dates of start and finish are particularly susceptible to schedule risk. This extra risk is called "merge bias."

ID	Task Name	Rept ID	Min Rdur	ML Rdur	Max Rdur	Curve	May	June	July	Aug	Sept
1	Project	2	0 d	0 d	0 d	0					
2	Start	0	0 d	0 d	0 d	0					
3	Unit 1	1	0 d	0 d	0 d	0					
4	Design Unit	0	20 d	30 d	45 d	2					
5	Build Unit 1	0	35 d	40 d	50 d	2					
6	Test Unit 1	0	20 d	25 d	50 d	2					
7	Unit 2	1	0 d	0 d	0 d	0					
11	Unit 3	1	0 d	0 d	0 d	0					
15	Finish	0	0 d	0 d	0 d	0					

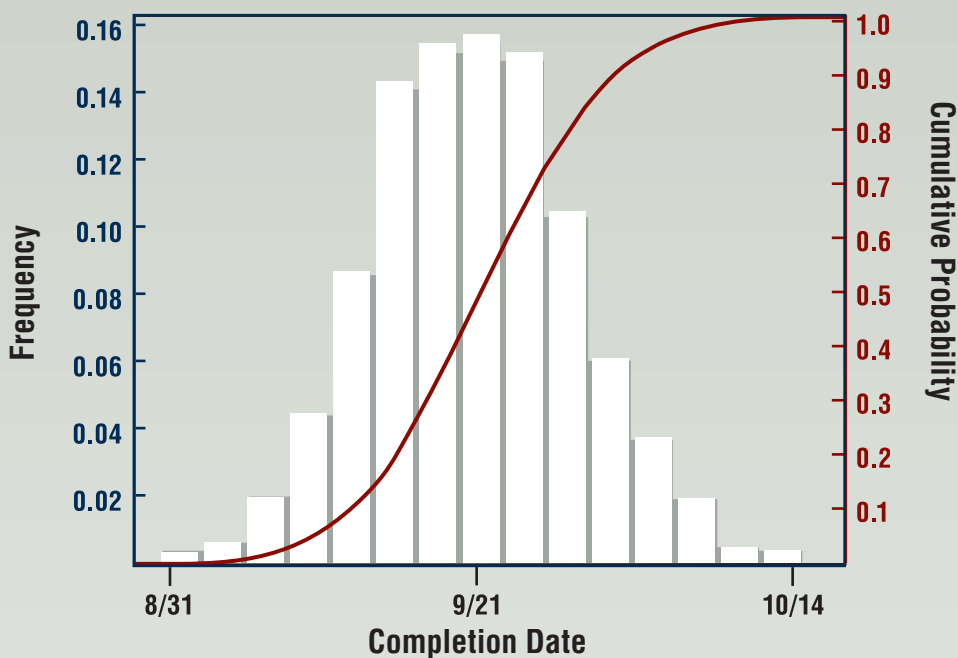
**Figure 5:** Three identical tasks, Unit 1, Unit 2, and Unit 3 have the same subtasks with the same respective probability distributions. For the sake of simplicity, the tasks Unit 2 and Unit 3 appear collapsed as summary tasks. The critical path method employed by Microsoft Project predicts the project's end date as September 3

The concept of merge bias needs further clarification. Look again at the schedule in **Figure 5**. It has three parallel tasks: Unit 1, Unit 2, and Unit 3. For the sake of simplicity, they are all the same, with the same three



*Continued on page 9*





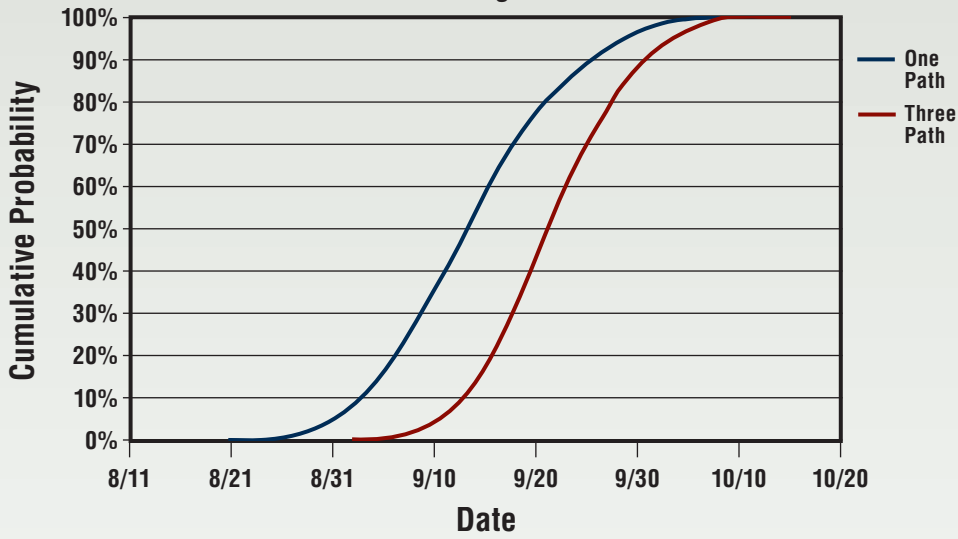
**Figure 6:** Merge bias: compare the probability distribution for the project completion date of this figure with that of **Figure 3** (on previous page). You will notice that here the project's completion dates appear later. For instance, the most likely completion date is now September 21. This shift in the probability distribution of the project's completion date is the typical "Merge Bias."

**Completion Probability Table**

Prob	Date	Prob	Date
0.05	9/10	0.55	9/22
0.10	9/13	0.60	9/23
0.15	9/14	0.65	9/24
0.20	9/15	0.70	9/25
0.25	9/16	0.75	9/26
0.30	9/17	0.80	9/27
0.35	9/18	0.85	9/29
0.40	9/19	0.90	10/1
0.45	9/20	0.95	10/3
0.50	9/21	1.00	10/14

**Table 3:** Details of the Monte Carlo simulation in **Figure 6** show the likelihoods for the various completion dates. Note that most likely completion date of September 21 is 50 percent likely, and the pragmatic 80 percent likely completion date occurs on September 27.

**The "Merge Bias"**



**Figure 7:** Graphical evidence of the merge bias shows what happens to the project completion dates and their likelihood when the network diagram has a merging point of paths. The completion dates occur later.

probability distributions in their respective three subtasks. All three merge in the milestone "Finish" on September 3. The results of the Monte Carlo simulation appear in **Figure 6**. The most likely completion date for the project falls on September 21, which **Table 3** shows is 50 percent likely, and the 80 percent likely date falls on September 27.

As soon as several paths are merging, their combined probability distributions move the most likely and the 80 percent likely completion dates further out in time. Refer to **Figure 3** and **Table 2** (on previous page) for the comparison with the single-path project. This merge bias in completion dates is most readily discernible when the cumulative probability curves for the one and the three path projects appear plotted together in **Figure 7**.

The question now facing the PM is, "Which are the highest-risk activities?" The answer, as Dave demonstrated by analyzing various scenarios on his laptop, is not intuitively obvious, for the path delaying the project may not be the critical path identified in the deterministic schedule by the critical path method. Dave distinguished two kinds of critical paths:

technically-critical path (as determined by the critical path method) and schedule-critical (as determined by Monte Carlo simulation). Hence, over the course of a project, the uncertainty in the paths may cause the critical path to change.

Task duration is not the only source of risk. Task cost is just as much. For example, when a task's cost is derived from the number of workers assigned and their daily rate, in addition to the task's duration, the uncertainty in any of these variables leads to uncertainty in the estimate of the project cost. Dave made an excellent case for more accurate cost estimates and better understanding of the underlying reasons for risk when the risk analysis addresses risk in time and risk in cost individually, and presents the results as the effect of both. To this end, he performed a risk analysis on his laptop by varying both cost and time elements.

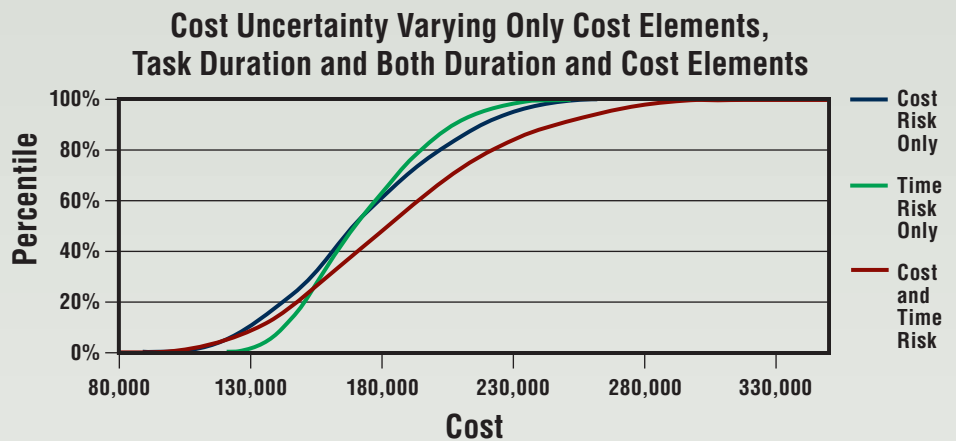
The results are impressive. **Figure 8** (on next page) shows an example of cost uncertainty in percent as a function of project cost. For instance, the 80 percent likely cost is \$196K for schedule risk considered alone, \$202K for cost risk considered alone, and \$224K for cost and schedule risk combined. Or, heuristically speaking, the more sources of risk the analysis includes, the more the cumulative probability of total project cost is shifted to the right towards higher costs.

*Continued on page 10*

In addition to the aforementioned examples, Dave presented several more instances that made his seminar truly advanced, lifting our chapter's advanced topic program to new heights.

A million thanks to you, Dave, for taking the time to compile and present your findings of your professional expertise. The many examples from your own practice and your elucidating answers to the questions from the audience made your presentation a delight to witness. Come again, soon.

**George D. Meier, Ph.D., PMP**



**Figure 8:** Varying both cost and time elements in the risk analysis provides a more accurate picture of cost risk. For instance, the 80 percent likely project cost is \$196K for schedule risk analyzed alone, \$202K for cost risk analyzed alone, and \$224K for the combined analysis of schedule and cost risk.

## Managing Straws

By Craig D. Wilson, PMP

**L**ong before the proverbial last straw broke the camel's back, that poor camel had ceased being effective. And I'll bet that, given the heavy load, he may have originally been one of the top performers in the caravan. But the reward for a job well done is often more work; so, overburdened and stumbling, he not only ceases being the top performer he once was, but impacts the performance of the whole caravan as he trudges on still trying to perform up to expectations.

When managing a portfolio of projects, you are faced with determining how to spread the project load across your team. You must take into consideration not only technical and soft skills, but "strength of back." You know that there are some members of your team upon whom you can depend: the 20 percent who seem to perform 80 percent of the work. But, unless you are incredibly fortunate, you will also have team members who are average and probably some less-than-average performers.

Time and time again, I've seen top performers stretched to the breaking point as they are assigned to most, if not all, of the complex and difficult projects. On top of this, they are also the ones most likely to be called in to rescue weaker members of the team on their projects or called in the wee hours of the morning to address production problems.

Now the interesting thing about top performers is that they often don't complain or push back on the assignments. They

continue to push on and, being top performers, they may still out-perform other members of the team.

The question is, are they continuing to perform to the best of their abilities? More importantly, is the overall team performance the best that it could be? By the way, you often don't know that the non-complaining top performers are unhappy until the day they drop their resignation letter on your desk. Then it's YOUR back that is broken as you try to re-build the team! I've seen managers lose their jobs because once the top performer left the team, the manager's inability to effectively manage the rest of the team was exposed for all to see.

There are several factors that you may wish to consider when planning resource assignments as part of the project portfolio planning effort.

- The average worker has no more than about 1,800 hours a year of assignable time. The remainder is taken up with holidays, sick leave, vacations, and training. When you add general administrative tasks like staff and company meetings, the actual time spent working is almost certainly far less. This works out to no more than 16 to 18 working days per month on average. However, vacations and training are not "averaged," and you will have months, especially in the summer and at the end of the year, where your work force may be significantly reduced.
- Factor in the time for any staff member who will be involved in supporting production issues. This should be based upon a percentage of their availability and may be different for team members with different skill sets. Remember that as new systems are added to your production set, more support time will be required.
- When assigning top performers, assign part of their time to mentoring and coaching team members on other projects. Make this a proactive effort rather than expecting them to fix problems on other projects after they have occurred.

Dealing with staff assignments is only part of project portfolio management. Other activities include strategic planning, project selection, budgeting, and portfolio reporting and tracking. However, dealing with human resource issues is constant and ongoing. Of all the portfolio management activities, this will take the most of your management time.

**Craig D. Wilson, PMP** is an IT management consultant with extensive PMO and project portfolio management experience. Craig can be reached at [craigdwilson@matincor.com](mailto:craigdwilson@matincor.com) or (949) 388-3559. Further information, including a basic staff planning model, is available at [www.matincor.com](http://www.matincor.com).

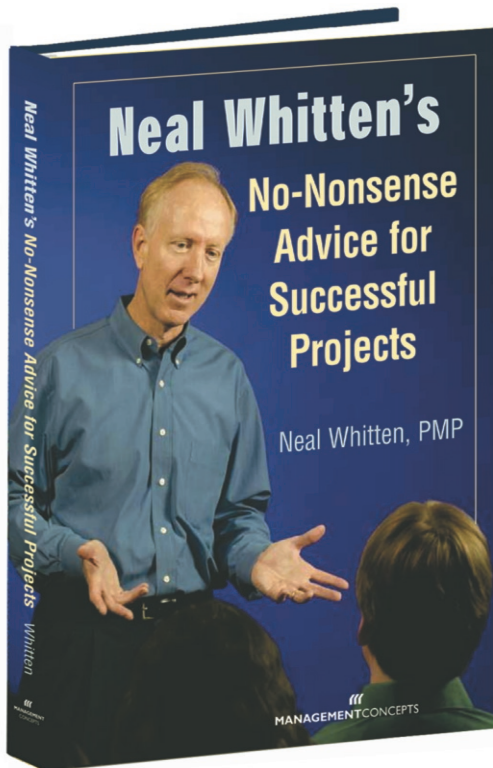


**ORANGE COUNTY CHAPTER**

is pleased to present



# Neal Whitten's No-Nonsense Advice for Successful Projects



Successful projects don't just happen — they are made to happen. Popular speaker and best-selling PM author Neal Whitten takes leadership and project management to a personal level by revealing leading-edge best practices that make all the difference between leading consistently successful projects and playing the victim with troubled projects.

Focusing on leadership and soft skills, but including hard skills and life skills, this seminar reveals choices to make and behaviors to adopt that are invaluable in helping you become a successful project manager and leader. Based largely on his latest best-selling book, ***Neal Whitten's No-Nonsense Advice for Successful Projects***, Neal has collected practices from among his favorite and most effective — many learned too slowly and painfully. Adopting one can benefit your project; adopting many can benefit your career. *It's not about the ability of those around you to lead; it's about your ability to lead, despite what is happening around you.*

**When:** Saturday, April 14, 2007  
8:00 a.m. to 5:00 p.m.

**Where:** Crowne Plaza Anaheim Resort  
12021 Harbor Boulevard  
Garden Grove, CA 92840-4001  
714-867-5555  
714-967-5100 FAX  
www.anaheim.crowneplaza.com

**PDU's:** Earn seven (7) PDU's

**Fees:** Before March 12  
PMI members\* \$250  
Non-members \$290  
With educational discount\*\* \$200  
After March 12  
PMI members\* \$275  
Non-members \$315  
Fee includes workshop, materials,  
breakfast, lunch, snacks and a  
copy of *Neal Whitten's book*.

**For more information:**  
programs@pmi-oc.org

**Registration:**  
www.pmi-oc.org

\* Includes members of other PMI chapters  
\*\* Includes students, staff, instructors  
ID required at check-in  
PMI membership not required

## Topics Include:

leadership styles • being too soft • managing priorities • fostering interpersonal communications • boldness • escalations • integrity • accountability • professional behavior and recognizing professional immaturity • dealing with criticism • how to make long-term project commitments • running an effective meeting • duties of the effective project manager • the need to fail • dealing with difficult people • three critical actions that are overlooked on most projects • and many more specific leadership tips for promoting project success.

---

**No theories here! This stuff works!** Come prepared to rethink what constitutes effective leadership and project management. You won't want to miss this!



### Neal Whitten, PMP

Neal Whitten, PMP, is a popular speaker, trainer, consultant, mentor, and author in the areas of both project management and employee development. He has written over 80 articles for professional magazines and is the author of six books.

Mr. Whitten has over 35 years of front-line project management, software engineering, and human resource experience, of which 23 years were with IBM. He is a Member of PMI, is a PMI-certified Project Management Professional (PMP), and is a contributing editor of PMI's *PM Network* magazine.

### Schedule:

Registration, breakfast, networking  
7:30 to 8:30 a.m.

Seminar begins:  
8:30 a.m.

Snack break:  
10:30 a.m.

Lunch:  
12:00 to 1:00 p.m.

Snack break:  
2:30 p.m.

Seminar concludes:  
4:30 p.m.

### Overnight Accommodations:

Crowne Plaza Anaheim Resort is offering a special room rate of \$109, plus applicable tax, per night.

Please contact hotel reservations at 866-888-8891 and mention The Project Management Institute of Orange County April 14th seminar.

# Neal Whitten's No-Nonsense Advice for Successful Projects

## Learning Objectives

- ◆ Identify best practices that will cause your behavior, decisions, and actions to become more deliberate, effortless, and natural as you lead.
- ◆ Identify personal attributes — leadership and soft skills — that contribute to your success and the success of your project.
- ◆ Recognize how to boost your confidence in taking charge and making things happen.
- ◆ Create a culture that fosters the success of your project.
- ◆ Identify ideas that promote the advancement of project management/organizational concepts.

## What readers are saying...

Neal injects badly needed leadership skills and accountability into project management.  
*(Project Manager, Federal Government)*

I rated the seminar “far exceeded expectations” ...and my expectations were very high. Everyone in my company — including management — must experience this seminar!  
*(IT Operations Manager, Insurance)*

Neal did an excellent job bringing the abstract concepts to the concrete workplace. It is obvious that he has “been there” which makes a huge difference in training others.  
*(Senior Project Manager, Telecom)*

Fantastic! Exactly what I am looking for in a project management seminar! Straight to the point — no fluff! Very aptly-named session!  
*(Program Manager, Health Care)*

I cannot recommend this seminar enough. Everything stated is very applicable to my job. Neal provided many anecdotes that helped relate material to work environment and life. I feel revived and enthused to promote change in my work environment.  
*(Program Manager, Computer Development)*

Excellent presentation skills. Easy to listen to, engaging and witty. Transmits passion. I appreciated the strong sense of ethics and integrity underlying all of the topics.  
*(Project Office Director, State Government)*

# THE SCRUM APPROACH



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# Upcoming Classes

## Santa Clara, CA

**April 10-11** ScrumMaster Certification

**April 12** Agile Estimating and Planning

## Boston, MA

**May 30-31** Product Owner Certification  
(with Ken Schwaber)

## Denver, CO

**July 31-Aug 1** ScrumMaster Certification

**Aug 2** Agile Estimating and Planning

Whether you are currently on a Scrum team or are interested in helping your team adopt an agile process, these classes are for you. You will leave with practical knowledge you can put to use immediately. Learn the role and skills of the agile project manager (ScrumMaster), agile project customer (Product Owner), and how to create reliable plans in the face of uncertainty and change.

To schedule an on-site class or for other public class dates, visit our website at [www.mountaingoatsoftware.com](http://www.mountaingoatsoftware.com)

## Learn for Project Management

UCR Extension offers a six-course certificate program in Project Management. Classes for Spring quarter are:

### STRATEGIC PROJECT PLANNING

Fri., 9 am-4 pm, May 18  
Reg #064-MBA-A22

### PROJECT MANAGEMENT ESSENTIALS

Mon., 6:30-9:30 pm, April 2-June 11  
Reg #064-MBJ-JO2

### PROJECT SCHEDULING AND RISK MANAGEMENT

Tue., 6:30-9:30 pm, April 10-June 12  
Reg #064-MBJ-JO3

### PROJECT PROCUREMENT MANAGEMENT

Thurs., 6:30-9:30 pm, April 5-June 7  
Reg #064-MBJ-JO4

### NEW PRODUCT DEVELOPMENT

Thurs., 6:30-9:30 pm, April 5-June 14  
Reg #064-MBJ-JO1

### PROJECT MANAGEMENT PROFESSIONAL AND CERTIFIED ASSOCIATE EXAM PREPARATION

Tue.-Thurs, 9 am-5:30 pm, May 8-10  
Reg #064-MBJ-JO5

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## NEW MEMBERS

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Rodger Beard  
Randall Berens, PMP  
Rand Beveridge  
Melissa Browne  
Michelle Bui  
Cheryl Canto  
Gloria Chen  
Jennifer CurLee  
Larry Davis  
John De Raimondo  
Russell DeLong  
Kevin Deysenroth, PMP  
Dennis Donohue  
William Georges  
Lynne Halverson  
Anthony Johnson  
Todd Johnson  
Kelly Kallaher  
Kambiz Kashani  
Jon Kawai  
Charles Kelecic  
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Karen Kirby  
Chester Little  
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Madhava Krishna Meduri DV  
Jason Mork  
Reza Movafaghi  
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Roger Torriero  
Edward Uy, PMP  
Jeff Wasserman  
Angela White-Parker  
Nancy Young, PMP  
Maryann Yu, PMP  
Richard Zalac

## NEW PMPS

Nehme Abouzeid  
Kevin Deysenroth

Wednesday, March 14, 2007

# MEMBER/VOLUNTEER ORIENTATION TRAINING

**WELCOME** to Project Management Institute – Orange County Chapter, Inc. You have taken the first step toward managing your professional career network and developing relationships with local, knowledgeable project managers and like-minded professionals. You are invited to come join the Member/Volunteer Orientation Training session. Topics include:

PMI® Website	PMI-OC Website	Volunteer Opportunities
<ul style="list-style-type: none"><li>• Membership Profile</li><li>• Components</li><li>• Logging PDUs</li></ul>	<ul style="list-style-type: none"><li>• Valued Programs</li><li>• Event Registration</li><li>• Career Center</li></ul>	<ul style="list-style-type: none"><li>• Ambassador Program</li><li>• Networking 101</li><li>• More . . .</li></ul>

Meet the PMI-OC Board of Directors, your fellow members, and volunteers. We will present the value added benefits, professional development opportunities, and programs that PMI-OC offers to its members.

The number one benefit of your membership in PMI-OC is the vast pool of individuals to network with. Networking is a powerful way to make new contacts and bolster your access to these resources when you need them. Networking also increases your professionalism and heightens your visibility with others.

We will present a brief overview of the techniques you can use to maximize the time you spend with fellow members. Utilizing these tips and pointers will improve your networking skills and enrich the experience measurably.

**When:** **Wednesday, March 14, 2007\***  
6:00 p.m. to 8:00 p.m.  
Registration and food start at 6:00 p.m.  
Program starts at 6:30 p.m.

**Where:** **UC Irvine**  
**UNEX Building 236, Rooms 168-70\***  
Trailer H behind Student Health Building\*  
Search for Quadrant D8, Building 238 on the UCI map at the following link:  
[http://today.uci.edu/pdf/UCI\\_06\\_Map.pdf](http://today.uci.edu/pdf/UCI_06_Map.pdf)

**Directions:** **Southbound:** Take 405 and make a **right** turn on Jamboree Road.  
**Northbound:** Take 405 and make a **left** turn on Jamboree Road.  
Next, make a left turn on Campus Drive, go past University Drive, pass the Irvine Barclay Theater (on your right), and then turn right on Stanford into UCI parking lot SSPS. Then follow the yellow PMI-OC EVENT signs to the designated location.

**Cost:** Parking is \$2.00 an hour.  
Food provided at no charge.

**Register:** [www.pmi-oc.org](http://www.pmi-oc.org)  
Please register early. Space is limited to the first 40 members.

**Questions:** E-mail: [membership@pmi-oc.org](mailto:membership@pmi-oc.org)

\* Please note date and campus facility changes.

# PMI-OC LEADERSHIP INSTITUTE LAUNCHED

## Foundations: Leadership Can Be Taught and Can Be Learned!

**O**n January 26 and 27, PMI-OC launched its first annual Leadership Institute program for cultivating leadership depth in a global environment. **Dr. Jerry Brightman** facilitated the first of three two-day sessions at the Wyndham Orange County Hotel in Costa Mesa. This year-long program is modeled after PMI's Leadership Institute, which Dr. Brightman created.

In this first session, the 20 participants/students experienced unique learning from the start: no agenda, no syllabus, no detailed PowerPoint presentations. Rather, the focus was on discussions, exercises, and journaling.

Dr. Brightman's leadership is an evolving combination, a mix of knowledge, skill and creativity which may be innate, but can be taught and learned. Leadership knowledge balances traditional systems, that address whole organizations, with contemporary thinking about self-knowledge. Leadership skill is derived from the application of knowledge, from patterning behavior from great leaders and from personal coaching. Creativity is subtler than knowledge or skill because the leader charts a new path for others to follow. Leadership dwells in the creation of novelty.

While Dr. Brightman's leadership respects the traditional qualities that can be derived from systems thinking and team learning, his mental model reserves a place for the unconventional.

One exercise involved 250 colored pictures from the Center for Creative Leadership. Participants were invited to close their eyes and silently develop mental images of their leadership. Then each chose a picture that captured their mental image of leadership. The ease with which participants found pictures that matched their image represents a shift in viewpoint that allows resonance between a mental image and a pictorial image to eclipse the labor of logic. That resonance later found validation when the owner of the mental image asked others to comment on the match between the image and the picture. There was no specification, no calculation . . . just a beautiful non-rational experience that produced a tangible expression of leadership.

In the coming three months of this year-long learning journey, the PMI-OC Leadership Institute participants will complete a SkillSoft 360-degree leadership assessment and Session Two: Discovering the Leader Within. So, look for another program update later this year.

For more information about the PMI-OC Leadership Institute and future chapter events, contact **Pan Kao, PMP**, PMI-OC Programs Director, at [programs@pmi-oc.org](mailto:programs@pmi-oc.org).

**Carolle Dalley, PMP**



## Test Your Knowledge on PMP Exam Questions

Answers are on page 19

Here is a sample of some questions:

1. The project charter is the document that formally authorizes a project. The charter should address all of the following, either directly or by reference to other documents, except for:
  - a. Project purpose
  - b. Project selection methods
  - c. Who is assigned as project manager and his/her authority level
  - d. Organizational, environmental, external assumptions and constraints
2. Most project life cycles share a number of common characteristics. One of them is the level of un-certainty, which is greatest:
  - a. At the final phase of the project
  - b. During the intermediate phase(s) of the project
  - c. At the start of the project
  - d. It cannot be determined
3. The term fast tracking means:
  - a. Putting the entire project team on an overtime schedule
  - b. Reducing the project duration by overlapping or performing activities in parallel
  - c. Coordinating efforts with other projects to reduce resource conflicts
  - d. Trying to beat the competition
4. You and your project team have been assigned the responsibility of identifying and classifying the types of vegetation in a specific region of the Amazon forest. You are 900 kilometers from the nearest town with a population of 700. It is critical that you maintain contact with your client on at least a weekly basis. Because of the remoteness of your location, you need to establish a means to request and obtain emergency assistance. These are factors that should be addressed during which of the planning processes?
  - a. Information distribution
  - b. Communication planning
  - c. Cost estimating
  - d. Scope definition

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# Mr. CAP "M"

## Project Team Member CAPM Candidates



Frank with new CAPM Dollada Imsumran at the February dinner meeting

A Series of Columns  
by **Frank P. Reynolds, PMP, PMI-OC Fellow**

In last month's column, the first of three groups seeking CAPM® professional recognition were introduced.

That group included undergraduates, graduate students and interns in a wide variety of projects.

Our second group includes two distinct assemblages of participants. The *PMBOK® Guide* identifies the superset of project team members, with a subset of project management team members; individuals in these roles probably won't seek PMP® certification, but may seek CAPM benefits.

Project teams embrace subject matter experts, while technical specialists and contributors from a variety of specialties primarily produce intermediate and final products of a project. Many of these contributors lack training or guidance in project management purposes and processes.

Those least familiar with formal project work are end users, equipment and business process specialists, designers, analysts, auditors and experts in processes, and customers or interfaces that were impacted while implementing a project's outcome. Such professionals are aware their principal work is shifting from increasingly automated operations to working in project settings.

Their contributions are overlooked with their discontinuous but vital involvement in processes producing specifications, verifications, reviews, tests, and implementations. Benefits of their estimating, reporting, and forecasting are seldom maximized. Without such participants transmitting their explicit and tacit knowledge and experience, many projects have foundered.

The project management team subset includes responsibilities for administrative, supervision and managerial activities. Many are involved in preparing (literal and metaphorical) tools, jigs, and scaffolding needed to construct the end-product. These individuals perform as much as 20 percent of a project's effort that is allocated to project management.

Roughly half of our chapter's members maintain memberships in AITP, SCQAA, IEEE, IIBA, and STC, among dozens of specialties.

Next month, we'll continue our look at members of the project management team who, for various reasons, are not oriented towards accumulating knowledge and experience for attaining the PMP.

**Frank P. Reynolds, PMP, PMI-OC Fellow**



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# Coming Events

 **March 8**

### Breakfast With Your SOX On

Where do you go when you have a question about Sarbanes-Oxley? Come have breakfast with us for an informative discussion on this very elusive topic. Bring your particular SOX challenges, valuable articles, or discovered resources to share with the group. See page 20 for details.

 **March 9**

### SoCal Pharma LIG Breakfast Meeting

Market Reality Checks on R&D Projects  
Presented by John Kilheary, PMC/TROTTA  
MDS Pharma, Irvine CA

For more information, [www.pmi-oc.org](http://www.pmi-oc.org)

 **March 13 Dinner Meeting**

### Quentin W. Fleming, PMI-OC Fellow

Using EVM Light As a Start on All Projects

See pages 1 and 20.

 **March 15**

### Member/Volunteer Orientation

See page 14.

 **April 10 Dinner Meeting**

### Craig Smith

Building the Great Pyramid: PM 2550 B.C.  
Rescheduled from October 2006

Special note: This meeting will include a raffle for free admission to the April 14 Neal Whitten full day seminar.

 **April 12**

### Breakfast With Your SOX On

 **April 14 Full Day Seminar**

### Neal Whitten's No-Nonsense Advice for Successful Projects

Successful projects don't just happen; they are made to happen. Popular speaker and best selling PM author **Neal Whitten** takes leadership and project management to a personal level and reveals leading-edge best practices. See pages 11 and 12..

 **May 8 Dinner Meeting**

### Susan Powell

Managing Your Finances as a Project

 **May 17**

### Member/Volunteer Orientation

 **June 12 Dinner Meeting**

### Mike Gentile

The Security Professional-  
Project Management Relationship:  
Preventing Another Hatfield and McCoy

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# PMP EXAM PREPARATION WORKSHOP

## Winter 2007

January 20, 2007  
PMP Instructor Training  
University of Phoenix  
Costa Mesa



**Above:**  
George Meier, PMP  
conducts training  
session.

**Left:**  
George Meier, PMP  
and Mike Graupner,  
PMP address new PMP®  
workshop instructors.



February 3, 2007  
PMP Exam Prep Workshop  
University of Phoenix, Costa Mesa



**PMP Scope Class, Costa Mesa**  
Morning session at University of Phoenix.  
Tyrone Nance, PMP and David Bobrow, PMP  
(inset), co-instructors.

February 3, 2007  
PMP Exam Prep Workshop  
Holiday Inn, Laguna Hills



**PMP Scope Class, Laguna Hills**  
Morning session at Holiday Inn.  
Steve Bernard, PMP (center left) and Kristine  
Hayes Munson, PMP (above right), co-instructors.

## Scholarship Available

Each year, PMI-OC sponsors a **\$1,000 Charles Lopinsky Memorial Scholarship**, which is awarded through the PMI® Educational Foundation. This scholarship is open to students who are Orange County residents and are pursuing a degree in project management or a project management related field.

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For more information, go to the PMI Educational Foundation's website at [www.pmi.org/pmief](http://www.pmi.org/pmief).

**Application deadline for this scholarship is May 30, 2007.**

## Answers to PMP® Exam Questions

From page 15

1. b. **Project selection methods**  
(This is a tool and technique to develop the project charter)  
*PMBOK® 2004*, paragraph 4.1, page 82 [Initiating]
2. c. **At the start of the project**  
*PMBOK® 2004*, paragraph 2.1.1, page 21 [Project Life Cycle]
3. b. **Reducing the project duration by overlapping or performing activities in parallel**  
*PMBOK® 2004*, paragraph 6.5.2.3, page 146 [Planning]
4. b. **Communication planning**  
*PMBOK® 2004*, paragraph, 10.1, page 225 [Planning]

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## PMI Orange County MILESTONES

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Editor: **Roger Lew, PMP**  
editor@pmi-oc.org

Advertising:  
**Jon Bianco, PMP**  
advertising@pmi-oc.org

Design and Layout:  
**Jane Flynn**  
jane-flynn@earthlink.net

Printing: **Sir Speedy, Long Beach, CA**

Inquiries should be directed to:  
**PMI-OC, Inc.**

Attn: **Roger Lew, PMP**  
editor@pmi-oc.org

# PMI-OC Dinner Meeting

## Tuesday, March 13, 2007

Program **Quentin W. Fleming, PMI-OC Fellow**  
Using EVM Light As a Start On All Projects

Location: **Wyndham Orange County**  
3350 Avenue of the Arts, Costa Mesa, CA 92626

Schedule: 5:30 -9:00 p.m.

Cost: **Dinner and Presentation**

<i>In Advance:</i>		<i>At the Door:</i>	
Members	\$30.00	Members	\$40.00
Non-Members	\$35.00	Non-Members	\$40.00

**Featured Presentation Only (Members and Non-Members)**

<i>In Advance</i>	\$15.00	<i>At the Door</i>	\$15.00
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Parking: \$3.00 per car

Please register at [www.pmi-oc.org](http://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. on Sunday, March 11, to obtain the "in advance" price. Reservations made after this time will be charged the "at the door" price.

If you are unable to attend, please cancel your reservation at [www.pmi-oc.org](http://www.pmi-oc.org). Anyone who cancels their reservation after Sunday, March 11, or anyone who makes a reservation and does not attend, will not receive any refunds.

# Breakfast with Your SOX On

## Thursday, March 8, 2007:

**Doubletree Hotel, Irvine Spectrum**  
90 Pacifica Avenue, Irvine  
Meritage Restaurant & Wine Bar  
7:15 – 8:30 a.m.

Second Thursday of every month  
Registration: [kevinmerr@earthlink.net](mailto:kevinmerr@earthlink.net)  
Full breakfast buffet is self paid.  
Parking is validated.



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Orange County Chapter, Inc.  
P. O. Box 15743  
Irvine, CA 92623-5743