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## APRIL 10TH PMI-OC DINNER MEETING

# BUILDING THE GREAT PYRAMID

## PROJECT MANAGEMENT 2550 B.C.

By Craig B. Smith, Ph.D.



In his presentation on the incredible Great Pyramid of Giza, **Dr. Craig B. Smith** will describe the planning and engineering challenges of managing a complex project involving over two million blocks of stone and a work force numbering tens of thousands.

How would the ancient Egyptians have developed their building plans, devised work schedules, managed laborers, solved specific design and engineering problems, or even improvised on the job, 4,500 years before cell phones and computers?

**Dr. Craig B. Smith's** forty-year career has combined engineering design and construction of major projects involving advanced technologies. He has been an assistant professor of engineering at UCLA and formed ANCO Engineers, Inc., which develops advanced instrumentation and data acquisition systems and some of the world's largest structural vibrators for dynamic tests of high-rise buildings, dams, nuclear power plants, and other large structures.

In 1992 Dr. Smith joined Daniel, Mann, Johnson and Mendenhall (DMJM), where he held several positions before retiring in 2003 as president and chairman of DMJM Holmes and Narver. After retiring, Dr. Smith began a new career as a writer. In addition to *How the Great Pyramid Was Built* (Smithsonian Institution Press, 2004), he has published numerous other books.

April Vendor Showcase:  
**Volt Technical Resources**, [www.volt.com](http://www.volt.com)  
See ad on page 4.

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# THE CHAIR'S COLUMN

## NEW MEMBERS

Jocelyn Apple  
Samuel Barton  
Kent Bingham  
Elizabeth Bond  
Elaine Bredenbeck  
Brenda Breen  
Michael Bremser  
Christina Briley  
Jeffery Buckner  
Elfrin Colon  
Riz Condol  
Charles Craig  
James Farkas, Ph.D., PMP  
Joe Froehlich  
Howard Fung, PMP  
Curtis Gilbert  
Kam Izadi  
Sanjay Kumar  
Ramamohan Lankalapalli  
William Lloyd  
Dale Loftis  
Matthew March  
Debra Moore  
Meghann Morris  
James Olson  
Steven Parr  
Denise Pellegrino  
Daniel Perez  
Artyom Poghosyan  
Jennifer Relich  
Lisa Riley  
Juan Rodriguez  
Stacey Rose  
Beatriz Saavedra  
Charlotte Salisbury  
Nishit Sangani  
Mainak Sarkar  
Davin Sasaki  
Lillian Sibley  
John Simenton  
Venka Srinivasan  
Lily Van  
Trevor Weir  
Teresa White, Ph.D.  
Stephanie Wilkins  
Richard Williams  
Jonathan Wu, P.E., PMP  
Kevin Wu, Ph.D.

## NEW PMPS

Jeannine Alivojvodic  
Robert Bladen  
Valerie Cao  
Chris Comer  
Ty Dang  
Brian Fishman  
Howard Fung  
Kirsten Henry  
Shelly Kang  
John Lim  
Robert Meunier  
Jacqueline Mossel  
Carrie Rayner  
Amy Thompsonwade



## We Are Not Alone. And We're Good!

Being a PMI-OC volunteer can sometimes seem like a very lonely appointment. Whether you volunteer as the advanced topics chair, the volunteer coordinator, the *Milestones* editor or the dinner meeting chair, you can sometimes hear yourself think, "Nobody understands my problems." It's easier if you volunteer in an area that needs many similar volunteers, such as at the registration desk of our many events or as a dinner meeting ambassador. Here you can exchange views and ideas with your colleagues. The higher you go in our organization, however, the more difficult this gets.

This is the moment to remember that PMI® is a global network of project managers. There are hundreds of chapters like ours, and there are volunteers like you and me in these chapters. They face the same current issues and must resolve them for their chapters. If only we could get to know them to exchange ideas.

Meet **PMI Region 7**. PMI has divided the world up into 14 regions for the purpose of gatherings and mutual exchange. Our region consists of Arizona, California, Hawaii, Nevada and New Mexico. Once a year the chapter leaders from these states meet with the goal of learning from each other. This year, we met on March 9 through 11 in Woodland Hills. Because it was so close, most of our board of directors and a delegation from the advanced topics seminars were able to attend. And, as is tradition, everyone tried to bully Hawaii into holding next year's meeting. They declined. Also a tradition.

You may wonder if sending all these volunteer leaders to the Region 7 meeting is a valuable investment for the chapter. Yes it is, and **Sylvan Finestone, PMP**, has summed it up very well. "Region 7 provided a special opportunity to network and share information. It is unique in that there are both small and large chapters attending, each with their own challenges and responses to those challenges. As a learning experience for specific areas and for the chapter as a whole, it is a terrific value. The opportunity to learn and grow is exceptional."

To me, attending the meeting was invigorating and led to a realization. Life is hectic, and I sometimes suffer burnout, as many of us do. Catching up with **Jennifer Tharp, PMP**, past president of the San Francisco Bay Area Chapter and **Sash Dhar, PMP**, president of the Phoenix chapter, was invigorating. I was able to exchange ideas, learn from their experiences and recharge my batteries. Similarly, I was approached by many volunteers from other chapters who asked about our processes and were thankful for my input. And this is when I realized that we are a great organization. We have a strong membership, an excellent volunteer base, provide valuable programs to our members and are way above average in Region 7. I am proud to be the chair/president of PMI-OC and thankful to those who came before me and made us great.

And while we are talking about people who make us great, I want to give a special thanks to four outstanding volunteers who were recognized at the March dinner meeting. **Judith Berman, PMP, Gene Dutz, Sylvan Finestone, PMP and Mike Graupner, PMP**. As volunteers, this group has gone above and beyond the normal call of duty. Please see the article on page 3 to learn more about them.

Meeting other PMI volunteers or project managers from around the world is not something that is reserved for the board of directors. Many of us have jobs that take us into other regions of the country or the world. Often this means that we spend lonely evenings at the hotel bar. Next time look up the local PMI chapter and join them. Make new friends, recharge your batteries and gain a PDU or two.

**Cornelius Fichtner, PMP, Chair/President**

*Call it a clan, call it a network, call it a tribe, call it a family.  
Whatever you call it, whoever you are, you need one.*

# 2006 Volunteer Recognitions

March is a very special month for PMI-OC. At this time each year, the chapter recognizes all of its volunteers. During the March dinner meeting this year, there were 116 volunteers who were recognized for giving of their time and effort to the chapter during 2006. The hard work, sweat, and tears that go on behind the scenes are often taken for granted, but during the March dinner meeting the board of directors thanked all the volunteers for their efforts during the past year.

I had the distinct honor of expressing those words of thanks. I asked the dinner audience to remember all of these volunteers who form the true backbone of the chapter and pointed out that these volunteers have contributed to the efforts that earned PMI-OC three prestigious awards last year.

In addition to having all the volunteers present stand and be recognized, I presented awards to four outstanding volunteers. These outstanding volunteers were:

**Judith Berman, PMP • Gene Dutz • Sylvan Finestone, PMP • Mike Graupner, PMP**

Judith Berman (below left) and Mike Graupner (below right) were present to accept their awards. The volunteer coordinator will distribute the awards to the other honorees.



The PMI-OC Board of Directors thanks all of the volunteers for the hard work that makes the chapter what it is. See page 5 for a complete list of dedicated 2006 volunteers.

**John Sunderson, PMP**

## VOLUNTEER OF THE MONTH

### Victor Prebyl, PMP

The PMI-OC Board of Directors unanimously selected and recognized **Victor Prebyl, PMP** as Volunteer of the Month for March 2007. I honored Victor at the March dinner meeting by presenting him with a certificate of appreciation.

Victor joined the chapter in 2003. He earned his PMP certification in July of that same year. Victor is a volunteer whose work you see every month in the form of the slides that display during each dinner meeting. He quietly works behind the scenes to make the chapter function smoothly. He generates attendee badges, the PowerPoint presentations, and works with the board of directors on projects such as creating the chapter vision. He also works with the election committee and pitches in for those unfilled duties that always seem to turn up, particularly those that make the dinner meetings run smoothly.

Victor is a project manager at Autobytel.com. He claims it is the BEST place on the Internet to research your next car purchase. For the past two years he has led the IT team to prepare for Sarbanes-Oxley and other projects.

The board recognizes the contributions that Victor has made and thanks him for his dedicated efforts.

**John Sunderson, PMP**



## 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**.

### Speaker Coordinators

Assist the dinner meeting host in scheduling speakers for the monthly dinner meeting and advanced topic seminars. This position will require working closely with the host, the advanced topics chair, and the speakers.  
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**.

### 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**.

### Financial Auditor

Perform an audit of PMI-OC financial records. Duties include submissions of a written report to the board of directors focusing on the adequacy of internal controls, the accuracy of the records and reports to the board of directors, the proper authorization of activities and expenditures, the determination of the physical existence of assets, a review of the tax-exempt status, and ascertaining that taxes have been properly filed in a timely manner.

Contact **Chair Cornelius Fichtner**





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# 2006 PMI-OC VOLUNTEERS

Diane Altwies, PMP	Mike Graupner, PMP	Mary Ann Perdue, PMP
Francis Amalraj, PMP	Harry Greenberg	Robert Perrine, PMP
Gregg Anascavage	Mark Hamilton	Bob Pettis, PMP
Aynur Arkun	Mike Harmanos	Carla Poulin, PMP
Stephen Bach	Terry Hauser	Victor Prebyl, PMP
Don Barr, PMP	Tammy Hawkins	Janice Preston, PMP
Judith Berman, PMP	Galen Heisey	Judy Quenzer, PMP
Ishwar Bharbhari	John Hendershot, PMP	Aky Raiszadeh
Jon Bianco, PMP	Rodney Hendrixson, PMP	Neha Raithatha
Teresa Bold	Scott Hendrixson	Sriram Ramadas, PMP
Reza Bourbour, PMP	Leon Herszon	Sreesha Rao, PMP
Myrna Bravo, PMP	Wen Huang	Melissa Raralio
Curtis Browne, PMP	Brenda Ingham	Frank Reynolds, PMP
Ann Burkle, PMP	Naomi Iseri, PMP	Colby Riggs
Mike Chestnut	Scott Janke	Gregg Sears
Tim Covington, PMP	Stephen June, PMP	John Seelinger
Diane Cox	Jaymee Jusko, PMP	Michelle Seitz
Al Cruz	Himanshu Joshi	Bob Shumacher, PMP
Jude Cruz, PMP	Matthew Kamura	Franklyn Simon
Thomas Cutting, PMP	Pan Kao, PMP	Jude Smith, PMP
Paresh Desai, PMP	Adrienne Keane, PMP	John Sunderson, PMP
Barbara DeShann	Linda Keller, PMP	Evan Taylor
Vincent Domingo	Sanjay Kumar, PMP	Carl Temple
Gene Dutz	Ragupathi Kuppannan, PMP	Gregory Thomas-Roos
Joe Elizondo	Diane Le	Susan Thompson, PMP
Susan Faucheux, PMP	Roger Lew, PMP	Lyn Umles, PMP
Cindy Ferguson, PMP	Marlena Lewis	Bill Van Wyk
Steven Fernandez, PMP	Lora Lockwood, PMP	Reena Ved, PMP
Cornelius Fichtner, PMP	Estella Maldonado-Fusco	Chandra Vempati, PMP
Kim Fields, PMP	Sabrina Mancini-Johnson	Nisi Vidato, PMP
Sylvan Finestone, PMP	Sinan Mayfield, PMP	Gloria Walser
Victoria Flanagan	Melanie McCarthy	Dee Weddell, PMP
Catherine Ford, PMP	Kit Meader, PMP	Ronald Weddell, PMP
John Fuchs, PMP	George Meier, PMP	Sharon White, PMP
Glen Fujimoto	Kevin Merriman, PMP	Barry Whitesides, PMP
Greg Garner	Jim Monical, PMP	Beth Williams, PMP
Shirley Goodwin, PMP	Kristine Munson, PMP	Julie Wilson, PMP
Nitin Gotmare, PMP	Tammy Nguyen	Linda Wilson, PMP
Nora Goto, PMP	Pia Nielsen-Wagner, PMP	George Wong
Steven Goto, PMP	Joe Paradiso, PMP	Fiona Young Kouzy, PMP

## Mr. CAP "M"

### Project Management Team Member CAPM Candidates



A series of columns by  
**Frank P. Reynolds, PMP**

This month we deal with a subset of the project team: the project management team members. Among project management team members,

there are those who are on the path to becoming certified project managers. This month and next, we'll examine project management team members who are less likely to strive to attain the PMP®.

Project managers generate value by having a breadth of understanding and a willingness to reduce ignorance through progressive elaboration of technology and knowledge. Many members of a project management team have other professional interests. Team members specializing in project management operations are the focus of this month's column. Next month we'll address others who assure business, technical specialty and social representation.

Project activities are not solely groundbreaking, innovative or creatively risky. Many project activities demand consistency, rigor and accountability. A project manager wants to begin the day with news of variances from which to select the day's initiatives. Significant work to provide prompt, accurate and precise information and supporting data requires collection and verification of cost, scope, schedule, quality, risk, procurement and human resources data. Most importantly, it must be communicated in terms of variance, change and configuration expectations.

Many project managers expect to spend their time solving problems, dealing with risk events and encouraging individual contributors. They do not view themselves performing the daily data gathering, evaluation and communication roles filled by others on their project management team. Project managers select, support and depend upon a project management staff-based infrastructure that creates the illusion of a going concern, while in fact the project and its supporting organization morphs by design and adaptation throughout its predetermined span.

Project administrators, analysts and technical operations specialists are all candidates for the CAPM® certification. Their work implements significant parts of the *PMBOK Guide*®.

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

## PMI-OC Membership

Your 2007 board members recently attended the PMI Region 7 Conference in Woodland Hills, where we met representatives from other chapters in California, Arizona, New Mexico and Nevada. We were there for two full days, with many sessions, presentations, interactive opportunities and a few fun events.

We presented a seminar/workshop on our 2003 PMI® Component Award winning volunteer program, which is considered to be a best practice, not only for our chapter, but globally as well. We discussed our Member/Volunteer Orientation Training and how we recruit and utilize members to energize our volunteer base.

What really became evident was how chapters, large and small, are looking at PMI-OC as the model to follow. As we discussed PMI-OC's operations, we realized that our chapter is very well run and that our excellence is recognized by other Region 7 leaders.

Yet, I look at our significant number of non-renewals each month and ask, "What can we be doing better?" We have a seasoned group of leaders, both on the board and in key roles. We provide exceptional value to our membership through our programs and education opportunities; we have special meetings, seminars, and job fairs. We are the current owners of the title, "Best Large Component," as well as winners for Collaboration and Volunteer Programs in the same category (chapters over 1,000 members).

And we are losing members. Do you have any idea why? If so, please drop me a note at [membership@pmi-oc.org](mailto:membership@pmi-oc.org), and share your thoughts. I would really like to have more input to better serve our members, and you can help. Thank you.

**Sylvan Finestone, PMP, Membership Director**



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June 13  
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August 2  
Effective User Stories for Agile Requirements

#### Orlando

September 11-12  
Certified ScrumMaster  
September 13  
Agile Estimating and Planning

## Using EVM Light as a Start on All Projects

**T**his month, the PMI-OC dinner meeting attendees were treated to an informative presentation by **Quentin W. Fleming, PMI-OC Fellow**, on the topic, "Using EVM Light as a Start on All Projects." Quentin has three decades of project management experience, is the author of eight books, and is on the team that contributed the earned value section of the PMBOK®. With these well-earned qualifications, Quentin is indeed an expert on earned value management.

Quentin began his discussion with a brief description of earned value. He explained that it is a project management tool that builds on and requires an integrated baseline to accurately measure projects. He stressed the importance of having a well defined work breakdown structure (WBS) driven to the lowest level, and to use it to lock in the time and budget baselines. The Department of Defense (DOD) studied 800 projects on the relationship of EVM to project success. Based on that study, the DOD states that by using EVM correctly, you can predict project outcomes within ten percent.

The United States government and many private companies are requiring earned value management in accordance with the American National Standards Institute's ANSI/EIA-748 issued in 1998. The Office of Management and Budget (OMB) claims that EVM is a best practice and should be used on all federally funded projects. However, this presents a problem. There are 32 precise guidelines contained in the ANSI standard. These standards are too complex for most companies. The result is overkill and bureaucracy.

Quentin presented two options. You could understand and follow the 32 ANSI criteria, what he calls "EVM Heavy," or, take ten simple steps from the ANSI standard and scale up as necessary to meet customer requirements. Quentin prefers the term, "Simple EV," but it soon became known as "EVM Lite." Quentin then presented the ten steps from the standard that he felt were the most important for all projects.

**Step 1: Define the scope of the project.** Understanding your project scope is clearly the most important step which sets the stage for the remainder of the project and helps prevent scope creep. Quentin gave a sample of defining your project via a work breakdown structure (WBS) and suggested defining project scope at level one of the WBS and describing how to manage it at level two. The remaining work is defined at lower levels. Deliverables for this step include the WBS diagram and dictionary, list of project objectives, and what Quentin calls a "firewall" to prevent scope creep.

**Step 2: Determine who will perform the defined work, and identify all major procured work.** The ANSI standard describes a control account plan (CAP) for managing projects, what Quentin describes for level two of the WBS. This step involves finalizing the CAPs which manage the subordinate tasks. A CAP includes the defined scope, budget, schedule and manager over these tasks. Deliverables include the responsibility assignment matrix, make or buy analysis and bill of materials.

**Step 3: Plan and schedule the defined work.** This step is very important for



EVM. You must have a good schedule with resources, which allows you to lock each task into a time frame with a weighted value. Deliverables include the list of project tasks, identification of constraints, critical path, a master project schedule, identified risks and list of major tracking milestones.

**Step 4: Estimate the required resources and formally authorize the budget.** Quentin stressed the importance of tracking to the budget, not the estimates. Deliverables include formal budgets and an integrated project baseline.

**Step 5: Determine metrics needed to convert planned value to earned value.** Four elements were shown; Quentin feels that milestones, fixed formula tasks or percent completion estimates alone are not effective. He prefers percent completion estimates with milestone gates. This has worked well on his projects.

**Step 6: Determine points of management control and formally authorize control account plans (CAP).** Quentin indicated that it is the role of the project manager to effectively manage the CAPs, as the CAP measures the subordinate WBS tasks. Deliverables include the performance management baseline.

**Step 7: Record all direct project costs consistent with authorized baseline budgets.** In some organizations this is a major challenge! Quentin gave an example of a company that had a 25 percent error rate in this area. He suggested using an automated labor tracking system. The deliverables for this area include the data to issue monthly cost actual reports and weekly labor reports.

*Continued on page 8*



## Dinner Meeting Review

Continued from page 7

**Step 8: Continuously monitor the Earned Value performance to focus on exceptions.** According to Quentin, EV is a “manage-by-exception” process. He then shared some of the earned value equations from the PMBOK. Deliverables for this area include the ability to determine your variances, as well as the schedule and cost performance indices.

**Step 9: Continuously forecast the final required cost based on actual performance and keep management apprised.** One component of earned value is tracking estimate at completion (EAC). Quentin claims that if you do this correctly, you can “bank on it (the result)” within ten percent. The deliverable for this area is the EAC calculation.

**Step 10: Maintain the defined scope by approving or rejecting all changes, and incorporate approved changes into the project baseline.** The project manager must have the authority to manage all changes to the project. By managing change, you avoid scope creep and improve project success. Deliverables include a change control procedure and change control log.

There was a lot to cover in the short time allowed at a dinner meeting. More information can be found in the book written by Quentin and **Joel Koppelman**, *Earned Value Project Management*, where he describes the ten steps above in more detail, as well as all of the ANSI 748 criteria.

In summary, for most projects, starting with the ten steps and adding steps only as necessary to satisfy your customer will contribute to your project success.

**Steven Sable, PMP**  
sdsable@earthlink.net

### Special Note:

To download Quentin Fleming’s presentation material from the March 2007 dinner meeting, go to [http://www.pmi-oc.org/notices/QuentinFleming\\_PMIOC\\_Mar\\_2007-v2.pdf](http://www.pmi-oc.org/notices/QuentinFleming_PMIOC_Mar_2007-v2.pdf)

To download Janice Preston’s presentation material from the January 2007 dinner meeting, go to [http://www.pmi-oc.org/notices/Risk\\_Attitudes\\_2007\\_0115.pdf](http://www.pmi-oc.org/notices/Risk_Attitudes_2007_0115.pdf)

## Scholarship Available

Each year, PMI-OC sponsors a **\$1,000 Charles Lopinsky Memorial Scholarship**, which is awarded through the PMI® Educational Foundation. For more information, go to [www.pmi.org/pmief](http://www.pmi.org/pmief).

**Application deadline is May 31, 2007.**

## At the March Dinner Meeting



**Right:**  
Ed Knopf and Cynthia West from Project Insight, vendor showcase for March, select a lucky raffle winner.

**Left:**  
Signing in

**Below:**  
Socializing and networking



**Above:**  
Enjoying dinner and congratulating the 2007 volunteers and new PMPs.

**Right:**  
New PMPs **Laura Canaday**, **Robert Bladen** and **Leslie Agron** proudly display their commemorative mugs.





## A Highly Functional Team is All About Trust, Commitment, and Focus on Results

This was the message in part two of **Christine Fotheringham's** and **Margaret Meloni, PMP's** two part presentation on overcoming the five dysfunctions of a team. Part two, as did part one, followed closely in the footsteps of the presenters' favorite author, **Patrick Lencioni**.<sup>1,2</sup> For a recap of part one, consult the review in the January 2007 issue of *Milestones*,<sup>3</sup> and in particular consider **Figure 1** on page 13, which is repeated here for continuity.

The presenters began their lucid and light-footed journey through team leadership by serving up an intriguing analogy between the leader of a project team and the conductor of a classical music orchestra.

**Tables 1 and 2** (below) expand this analogy for team leader and conductor, and for team members and musicians.



**Figure 1:** The true measure of a team is that it accomplishes the results that it sets out to achieve. To do so consistently, it must overcome the five dysfunctions shown here.

THE CONDUCTOR	THE TEAM LEADER
Knows the score of the musical piece that the orchestra is playing	Must know and understand the scope of the team's project
Leads the talents of the musicians to produce an intergrated sound	Deploys the talents and contributions of subject matter experts to achieve the project objectives
Need not be able to play all of the orchestra's instruments	Need not be able to perform all of the team's roles
To be successful, conductor and team leader must earn the trust, respect and confidence of their players.	

**Table 1:** The true measure of a team is that it accomplishes the results that it sets out to achieve. To do so consistently, it must overcome the five dysfunctions shown here.

THE ORCHESTRA PLAYERS	THE TEAM MEMBERS
Must know the musical piece that the orchestra is playing	Must know the overall project scope and understand its objectives
Know their part and when it starts and ends	Know their tasks and when they are scheduled
Start and finish on time	Meet deadlines for their tasks
Pay attention to the music, listen to fellow musicians, and play in unison	Pay attention to their leader, listen to their team members, and support the team

**Table 2:** Just as the musicians know their part, the team members know their tasks.

"What is trust?" Christine asked her audience. "What does it mean for a conductor to trust the members of the orchestra, or for a project manager to trust the members of the team?" These are actually rather loaded questions; the answers are more readily obtained by looking at the other end of the spectrum, where there is no trust. See **Figure 1**.

This obviously deplorable, yet quite frequent, situation where there is no trust means that team members conceal their weaknesses and mistakes from each other. These people not only hesitate to ask for help or for constructive feedback, they also hesitate to offer help outside of their own areas of responsibility. Even worse, they tend to jump to conclusions about the intentions and attitudes of others without any attempt at clarifying them first. They fail to recognize each other's skills and ignore their experiences. Instead, they waste time and energy on managing their own behavior for effect. Because they hold grudges, and dread meetings, they avoid spending time with each other.

On the other end of the line are the members of trusting teams. These people freely admit their weaknesses and mistakes; they ask for help and get it. They accept questions and input about their areas of responsibility. Most importantly, they give each other the benefit of the doubt before arriving at negative conclusions. By offering feedback and lending assistance, they are willing to accept risks. As a result, they appreciate tapping into each other's skills and experiences. They focus their time and energy on what matters and is important, not on politics. Without hesitating, they offer and accept apologies. They look forward to meetings and seek opportunities for working as a group.

"How does one build trust?" Margaret asked her listeners, and continued with more questions like:

- Which is the better position to start from, trust or distrust?
- From which position do you start, with trust or distrust?
- What are some other ways to build trust in teams?
- Is trust achieved and then complete?
- Are we always working on trust with one another?

Here are Margaret's key points:

1. Trust is the foundation of teamwork.
2. On a team, trust is all about vulnerability, which is difficult for most people.
3. Building trust takes time, but the process can be greatly accelerated.
4. Like a good relationship, trust on a team is never complete; it must be maintained over time.

Continuing their line of thought, Christine and Margaret embarked on dysfunction number two: fear of conflict. Teams that fear conflict have boring meetings and create environments where back-channel politics and personal attacks thrive. The members of such teams deliberately ignore controversial topics, even though they are crucial to the team's success. They fail to tap the opinions and accept the perspectives of

<sup>1</sup> Lencioni, Patrick: *The Five Dysfunctions of a Team*. Jossey-Bass, San Francisco, 2002. ISBN 0-7879-6075-6.

<sup>2</sup> Lencioni, Patrick: *Overcoming the Five Dysfunctions of a Team*. Jossey-Bass, San Francisco, 2005. ISBN 0-7879-7637-7

<sup>3</sup> <http://www.pmi-oc.org/milestones/January2007.PDF>

other team members. They waste time and energy with posturing and interpersonal risk management.

In contrast, teams that engage in conflict have lively and interesting meetings. The members extract and exploit the ideas of all, and thus can solve problems quickly. They put critical topics on the table for all to see and discuss. Above all, they minimize conflicts.

Positive conflict can work wonders in teams, to wit a quotation by **Katzenbach and Smith**:

“Real teams don't emerge unless individuals on them take risks involving conflict, trust, interdependence and hard work.”

Lack of commitment is the third dysfunction in **Figure 1**. A team that fails to commit creates ambiguity among the team members about the project's scope, direction and priorities. Members of such teams watch windows of opportunity close due to excessive analysis and unnecessary delay. The ensuing situation breeds lack of confidence and fear of failure. Team members revisit discussions and decisions again and again, inviting a lot of second-guessing among team members.

On the other hand, team members who commit create clarity around direction and priorities. In this way, they align their entire team around common objectives, and everybody can learn from mistakes. Such teams know how to take advantage of opportunities before competitors do. Everybody moves forward without hesitation, and just as easily, changes direction without hesitation or guilt.

The following statement by **Vince Lombardi** sums it up most poignantly:

“Individual commitment to a group effort; that is what makes a team work, a company work, a society work, a civilization work.”

Here are the key points:

1. Commitment requires clarity and buy-in.
2. Clarity requires that teams avoid assumptions and ambiguity, and that they end discussions with a clear understanding about what they've decided upon.
3. Buy-in does not require consensus. Members of great teams learn to disagree with one another and can still commit to a decision.

Next comes dysfunction number four: avoidance of accountability. Not drawing the analogy too far, lack of accountability is like some members of an orchestra deciding not to play along with the piece; or some members of a team choosing to disregard the goals and deadlines it has set out to reach.

A team that avoids accountability, creates resentment among team members who have

*Continued on page 9*

## Understanding and Overcoming the Five Dysfunctions

Dysfunctional Teams	Functional Teams
<b>TRUST</b>	
<p><b>Members of teams with an absence of trust . . .</b></p> <ul style="list-style-type: none"> <li>• Conceal their weaknesses and mistakes from one another</li> <li>• Hesitate to ask for help or provide constructive feedback</li> <li>• Hesitate to offer help outside their own areas of responsibility</li> <li>• Jump to conclusions about the intentions and aptitudes of others without attempting to clarify them</li> <li>• Fail to recognize and tap into one another's skills and experiences</li> <li>• Waste time and energy managing their behaviors for effect</li> <li>• Hold grudges</li> <li>• Dread meetings and find reasons to avoid spending time together</li> </ul>	<p><b>Members of trusting teams . . .</b></p> <ul style="list-style-type: none"> <li>• Admit weaknesses and mistakes</li> <li>• Ask for help</li> <li>• Accept questions and input about their areas of responsibility</li> <li>• Give one another the benefit of the doubt before arriving at a negative conclusion</li> <li>• Take risks in offering feedback and assistance</li> <li>• Appreciate and tap into one another's skills and experiences</li> <li>• Focus time and energy on important issues, not politics</li> <li>• Offer and accept apologies without hesitation</li> <li>• Look forward to meetings and other opportunities to work as a group</li> </ul>
<b>CONFLICT</b>	
<p><b>Teams that fear conflict . . .</b></p> <ul style="list-style-type: none"> <li>• Have boring meetings</li> <li>• Create environments where back-channel politics and personal attacks thrive</li> <li>• Ignore controversial topics that are critical to team success</li> <li>• Fail to tap into all the opinions and perspectives of team members</li> <li>• Waste time and energy with posturing and interpersonal risk management</li> </ul>	<p><b>Teams that engage in conflict . . .</b></p> <ul style="list-style-type: none"> <li>• Have lively, interesting meetings</li> <li>• Extract and exploit the ideas of all team members</li> <li>• Solve real problems quickly</li> <li>• Minimize politics</li> <li>• Put critical topics on the table for discussion</li> </ul>
<b>COMMITMENT</b>	
<p><b>A team that fails to commit . . .</b></p> <ul style="list-style-type: none"> <li>• Creates ambiguity among the team about direction and priorities</li> <li>• Watches windows of opportunity close due to excessive analysis and unnecessary delay</li> <li>• Breeds lack of confidence and fear of failure</li> <li>• Revisits discussions and decisions again and again</li> <li>• Encourages second-guessing among team members</li> </ul>	<p><b>A team that commits . . .</b></p> <ul style="list-style-type: none"> <li>• Creates clarity around direction and priorities</li> <li>• Aligns the entire team around common objectives</li> <li>• Develops an ability to learn from mistakes</li> <li>• Takes advantage of opportunities before competitors do</li> <li>• Moves forward without hesitation</li> <li>• Changes direction without hesitation or guilt</li> </ul>
<b>ACCOUNTABILITY</b>	
<p><b>A team that avoids accountability . . .</b></p> <ul style="list-style-type: none"> <li>• Creates resentment among team members who have different standards of performance</li> <li>• Encourages mediocrity</li> <li>• Misses deadlines and key deliverables</li> <li>• Places an undue burden on the team leader as the sole source of discipline</li> </ul>	<p><b>A team that holds one another accountable. . .</b></p> <ul style="list-style-type: none"> <li>• Ensures that poor performers feel pressure to improve</li> <li>• Identifies potential problems quickly by questioning one another's approaches without hesitation</li> <li>• Establishes respect among team members who are held to the same high standards</li> <li>• Avoids excessive bureaucracy around performance management and corrective action</li> </ul>
<b>FOCUS ON RESULTS</b>	
<p><b>A team that is not focused on results . . .</b></p> <ul style="list-style-type: none"> <li>• Stagnates/fails to grow</li> <li>• Rarely defeats competitors</li> <li>• Loses achievement-oriented employees</li> <li>• Encourages team members to focus on their own careers and individual goals</li> <li>• Is easily distracted</li> </ul>	<p><b>A team that focuses on collective results . . .</b></p> <ul style="list-style-type: none"> <li>• Retains achievement-oriented employees</li> <li>• Minimizes individualistic behavior</li> <li>• Enjoys success and suffers failure acutely</li> <li>• Benefits from individuals who subjugate their own goals/interests for the good of the team</li> <li>• Avoids distractions</li> </ul>

**Table 3:** Contrast in the role of the leader of teams that suffer from the five dysfunctions shown in Figure 1 or of teams that understand and overcome them

different standards of performance. It encourages mediocrity. As a result, people miss deadlines and key deliverables. Clearly, such a situation places an undue burden on the team leader as the sole source of discipline.

By contrast, team members who hold each other accountable, ensure that poor performers feel pressured to improve. They identify potential problems quickly by questioning each other's approaches without hesitation. Such action establishes respect among team members because they are held to the same high standards. Accountable teams avoid excessive bureaucracy around performance management and corrective action.

At this point, Christine and Margaret invited all attendees to participate in a team exercise,

- Each table will receive a case study describing a situation with the absence of accountability.
- Discuss the situation and the action to be taken by the team leader and team members
- On flipcharts, draw two cartoons depicting
  1. The commitment of the team members
  2. Accountability in action
- No artistic ability required. Use stick figures and rough outlines. Be bold and use humor.
- Use productive conflict in your discussion and commit to the final design.

For overcoming dysfunction number four, here are the presenters' key points:

1. Accountability on a strong team occurs directly among peers.
2. For a culture of accountability to thrive, a leader must demonstrate a willingness to confront difficult issues.
3. The best opportunity for the team members to hold each other accountable occurs during meetings, and the regular review of a team scoreboard provides a clear context for doing so.

Perhaps the French dramatist **Molière**<sup>1</sup> (1622–1673) summed it up most succinctly. "It is not only what we do, but also what we do not do, for which we are accountable."

Finally, continuing their contrasting the negative with the positive in team situations, the presenters approached the fifth dysfunction in **Figure 1**. They asked their audience to consider teams that fail to focus on results. Such teams easily stagnate, fail to grow and, not surprisingly, rarely defeat competitors. By encouraging team members to focus on their own careers and individuals goals exclusively, they are easily distracted. As a consequence, such teams lose whatever achievement-oriented members they still have.

Quite a different situation manifests itself in teams that focus on collective results. They not only retain, but also attract, achievement-oriented members. By minimizing individualistic behavior, such teams benefit from people who subjugate their own goals and interests to the good of their team.

These teams never lose focus because they know how to avoid distractions. Returning to the opening analogy, just as an orchestra comes together to perform a specific piece of music and receive the audience's applause, a project team comes together to accomplish a strategic goal and receive the acknowledgement of the joint effort.

Here are the key points:

1. The true measure of a great team is that it accomplishes the results it sets out to achieve.
2. To avoid distraction, team members must prioritize the results of the team over their individual or departmental needs.
3. To stay focused, teams must publicly clarify their desired results and keep them visible.
4. "With trust, employees and leaders work with purpose toward company goals. Over the long term, trust may be the single

most significant determinant of a company's success."<sup>5</sup>

To succeed in tough assignments, teams need to focus on collective results, which means all team members must be accountable and hold one another accountable; for there is no accountability without commitment. However, on the way to commitment, productive conflict occurs. In turn, team members cannot engage in productive conflict until they first have established trust. **Table 3** on the page - summarizes these conclusions by contrasting each dysfunction with the benefits from overcoming them.

Like a mother who packs a sandwich for her child to take to school, Margaret and Christine left their audience with these final thoughts:

"As you go home and start your weekend, ask yourself and ponder these questions:

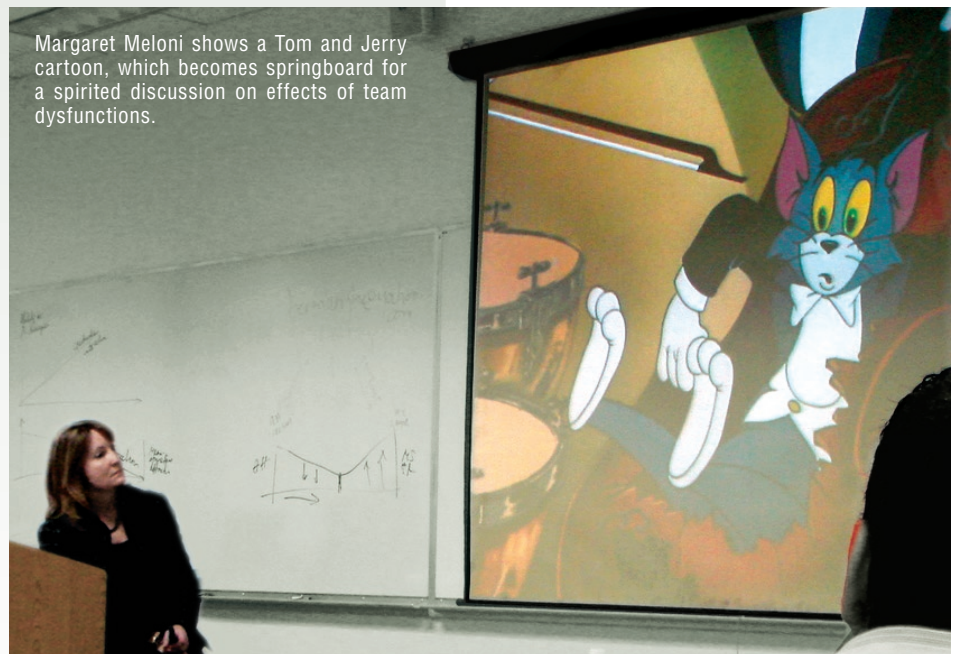
- What are you taking away today?
- What benefit will your teams reap from your participation today?
- How will you move forward to keep this process alive?"

Thank you, Christine and Margaret, for your motivating and informative presentation. With your thoughtful guidance through your topic, you have succeeded in inspiring us all.

**George D. Meier, PMP**

<sup>4</sup> Molière (mohl-yair'), whose real name was Jean Baptiste Poquelin, composed 12 of the most durable and penetratingly satirical full-length comedies of all time, some in rhyming verse, some in prose, as well as six shorter farces and comedies.

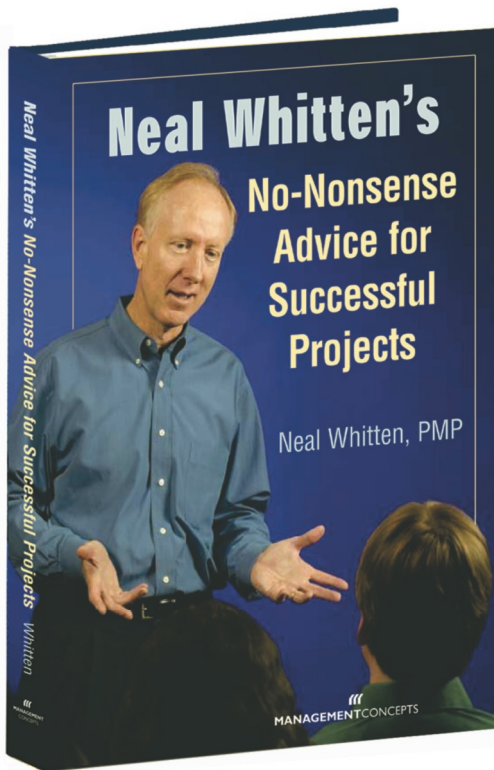
<sup>5</sup> Quotation from *The Trusted Leader*. Robert M. Gilford and Annie Seibold Drapea



Margaret Meloni shows a Tom and Jerry cartoon, which becomes springboard for a spirited discussion on effects of team dysfunctions.



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**For more information:**  
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### 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 people 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)*

I attended the Region 7 Leadership Conference and heard Neal speak for an hour. In that short time, he impressed me and PMI's Region 7 leaders with his knowledge and insight in keeping projects on track.

One of his many insights is, “**Believe that you can make a difference, and you will. You are what you perceive yourself to be; your vision of yourself becomes your reality.**” Furthermore, I remember his ten little words, “**If it is to be, it is up to me.**” This is a great opportunity to hear Neal speak.  
*(Brent Felsted, PMI-OC Marketing Director)*

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# PMI-OC MEMBER/VOLUNTEER ORIENTATION TRAINING

**T**he ninth PMI-OC Member/Volunteer Orientation Training was held on the UCI campus on Wednesday, March 14th. About 27 participants and five volunteers turned out for this event, designed to educate new and returning members about the benefits and resources offered by PMI® and PMI-OC.

The PMI-OC Member/Volunteer Orientation Training is a great way to connect with members of PMI-OC, as well as the volunteers and directors. New and inactive members can learn in-depth what PMI-OC has to offer. More importantly, this event provides information about volunteering and networking that everyone can use.

The meeting was similar to past orientation meetings, including a tasty meal. The menu is different at each meeting; this time it was Chinese food. These meetings are arranged to make members feel at ease and to get to know key volunteers and directors. The meetings are easy to locate; simply park in the SSPS parking lot on the UCI campus and follow the yellow PMI-OC signs.

**Terry Hauser** introduced the volunteers who put the meeting together. In addition to Terry, who was the meeting leader, they were Chair-Elect **Victoria Flanagan**; **Melanie McCarthy** from ResourceXperts; **Joe Paradiso**, PMP, registration; and **John Sunderson**, PMP, volunteer coordinator and ambassador.

Terry presented an overview of the meeting. He then covered what PMI-OC is all about and spoke about the many benefits of PMI-OC membership. He briefly touched on training, PDUs and PMP® certification. He announced the three very prestigious awards that the chapter recently received from PMI at the PMI Global Congress 2006, North America:

- 2006 PMI Component Award for Component of the Year
- 2006 PMI Component Award for Collaboration
- 2006 PMI Component Award for Volunteer Program of the Year

Throughout his presentation, Terry referred to the handouts that were given to all the attendees. These handouts are excellent references that are useful beyond the training session.

Terry then introduced John Sunderson, PMP, the volunteer coordinator. John spoke about the volunteers and the many opportunities available to learn and grow as a chapter volunteer. He explained the chapter's volunteer organization and each committee.

Terry next introduced **Melanie McCarthy**, who presented a mini-seminar, Networking 101. Her dynamic presentation on why and how to network kept everyone's attention. She concentrated on the essentials and connecting those members "looking" with people and places that would be productive. Somehow she always manages to make connections among the people attending.

Melanie listed several valuable networking tools that everyone should know about: (a) thirty second commercial about yourself, including your industry and discipline; (b) business cards, both personal and professional, (c) name badge worn on your right shoulder, (d) your resume, no longer than two pages, (e) networking brochure, and (f) list of accomplishments.

Melanie said that networking is a continuous grooming of contacts, rather than a one-time event. Getting to know people and establish relationships is key to networking. Melanie cited a 70 percent probability that your next job will be found by networking.

Terry then briefly introduced the website with a live demonstration. Victoria Flanagan assisted in the presentation, pointing out some of the many features.

A short wrap-up, including filling in the volunteer form and evaluation questionnaire, concluded the meeting. At PMI-OC there is a tremendous opportunity waiting for you, whether you want to network, meet people, connect with peers in your profession, or to enjoy all the benefits of volunteering.

To learn more about events and to receive PMI-OC's *E-Mail Blast*, please visit [www.pmi-oc.org](http://www.pmi-oc.org).

**John Sunderson, CDP, PMP.**  
volunteers@pmi-oc.org

## Test Your Knowledge on PMP Exam Questions

Answers are on page 18.

Here is a sample of some questions:

1. You are in charge of a project for developing new composite materials for application on advanced manned spacecraft. You have surmised that it would require between five to ten aerospace engineers. There are a few highly experienced engineers and relatively more junior level engineers available to participate in this project. Of course, the highly experienced engineers are more productive, but cost more. You want to determine an optimal mix of senior and junior personnel, as well as the need to identify quality standards and decide how best to satisfy them. In this situation, the appropriate technique is to:
  - a. Use a cause and effect diagram.
  - b. Develop a control chart.
  - c. Conduct a design of experiments.
  - d. Set up a Pareto diagram to analyze the process.
2. As part of a consortium, you are the project manager for construction of a new hospital. You must be especially concerned, not only with building codes in general, but specific environmental factors pertaining to hospital construction as well. As such, your project plan must invoke these factors because:
  - a. These factors, which are standards and regulations, are an input to quality planning.
  - b. Quality initiatives are costly.
  - c. Quality audits are necessary to ensure compliance.
  - d. Compliance with standards is the prime objective of quality control.
3. There are several projects in your organization competing for the same resources. You have concluded that there are certain risks, one of which is that your project will not be completed on time. Because of this situation you perform a risk analysis using a Monte Carlo simulation. Which element of your project plan should be used for performing the risk analysis?
  - a. The WBS
  - b. Updating the risk register
  - c. The PDM schedule
  - d. The Gantt chart
4. You have awarded a cost-plus-incentive fee (CPIF) contract for your project. The target cost is \$300,000 and the target fee is \$24,000. The fee share ratio is 80/20, with a minimum fee set at \$10,000. What would be your total payout on the contract if the seller realized an actual cost of \$400,000?
  - a. \$400,000
  - b. \$404,000
  - c. \$410,000
  - d. \$424,000

# MANAGE YOUR “PMP EXAM STUDY” PROJECT

## Part 1

By Dr. James T. Brown, PhD., P.E., PMP

**O**ne question I often hear in my work as a project management trainer and consultant is, “What is the best way for me to prepare for the Project Management Professional (PMP®) exam?”

Two main points are key to successfully passing the PMP exam.

1. Establish an exam preparation strategy tailored for you.
2. Execute tactics to maximize your chances of passing the exam. (Covered in Part 2)

If you manage your PMP exam studying as you would a project: analyze the situation and goals, establish a plan, execute that plan; you can succeed. Let’s walk through the processes of analysis and planning.

### Analyze

In order to establish a strategy that works for you, recognize that we all learn differently and have different demands on our time. If you don’t have the discipline and/or time to study on your own, take a class or a boot camp. Remember, classes and boot camps don’t eliminate work. Classes and boot camps concentrate and force you to work in the boundaries of the class time. The advantage of classes is that you can schedule them just prior to the PMP Exam and leverage the knowledge you have gained in the class while it is at the front of your mind.

The disadvantage is that classes often saturate you with so much information so quickly that you become overwhelmed and doubt your ability to retain the information and to pass the exam.

Learning in an intense fashion over a short time period (cramming) rarely results in long term retention. The popular analogy that applies here for a lot of people is, “It was like drinking water from a fire hose.” The brain retains information best when it comes in small amounts over long periods of time. If you do take a boot camp, use it as a refresher for knowledge you have been acquiring over a longer period of time.

There are numerous training classes and online training courses available, but you have to do your homework on the courses and their vendors before selecting one. PMI has recently come out with new guidelines about advertising claims

because of numerous complaints. Do some leg work before choosing a training provider. Talk to a few people who have used their services. If you go with a training company, ask them about the experience and ability of the instructor who will be teaching the course you will attend. Large training companies often hire contract instructors, and the quality of these instructors may vary widely. Ask how many times they have taught the course and for previous evaluation comments for this instructor. If you choose to take a class, don’t overlook classes offered by your local PMI chapters (see page 19). Most chapters have a history of success with these initiatives. Thousands have attained their PMP credentials through local PMI chapters, where classes are usually taught by volunteer chapter members.

Whether you take classes over an extended period or a boot camp, you can prepare for and reinforce formal training with self-study guides. I recommend either of the training guides below.

- **PMP Challenge**, J. Leroy Ward, Ginger Levin  
[http://www.amazon.com/gp/product/1890367265/qid=1143244072/sr=2-1/ref=pd\\_bbs\\_b\\_2\\_1/102-7252983-4061724?s=books&v=glance&n=283155](http://www.amazon.com/gp/product/1890367265/qid=1143244072/sr=2-1/ref=pd_bbs_b_2_1/102-7252983-4061724?s=books&v=glance&n=283155)
- **PMP Exam Prep**, Rita Mulcahy  
[http://www.amazon.com/gp/product/1932735003/qid=1143244120/sr=2-1/ref=pd\\_bbs\\_b\\_2\\_1/102-7252983-4061724?s=books&v=glance&n=283155](http://www.amazon.com/gp/product/1932735003/qid=1143244120/sr=2-1/ref=pd_bbs_b_2_1/102-7252983-4061724?s=books&v=glance&n=283155)

There are other guides that may be of equal quality, but I know people who have used these two successfully. Make sure the study guide complies with the latest version of the PMBOK® and/or the version that you will be tested on.

### Establish a Plan

When establishing your strategy for the exam, consider the following questions:

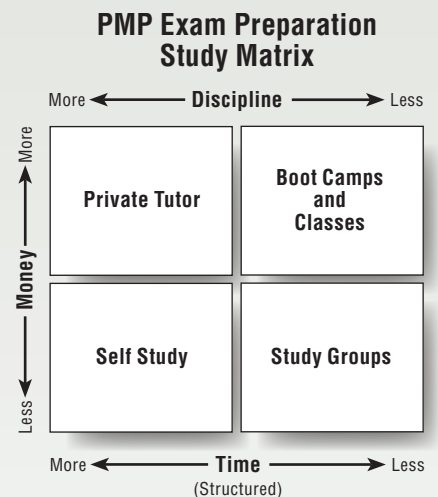
1. Do I have the money for a private tutor, class or boot camp?
2. Do I have the discipline to study for the exam on my own?
3. Do I work well with study groups and have access to others who want to be in a study group?
4. Do I have a history of success in cramming for tests?
5. Do I have access to a local PMI chapter that conducts prep courses?
6. Do I work well in an online class learning environment?

### How I Prepared

Examples of success can inform your own planning, so I offer my own preparation for the exam as a model. Colleagues who have passed the exam in your local PMP chapter may also offer their experience to help you plan.

Having had my fill of tests during my career, I was resistant to taking the PMP exam. I have found when it comes to tests, like a lot of things in life, it is better to give than receive. However, since project management is a field I love, the PMP certification was on my to-do list, and I had to prepare. The demands on my time are numerous, so I couldn’t commit to being part of a study group, and I didn’t want to take a class. I bought a practice exam and a study guide that was “flash card” based. Before I studied anything, I took the practice exam to see what I didn’t know. I then mapped out a strategy for test preparation.

I will outline the details of my test preparation strategy in Part 2 of this article in an upcoming issue of *Milestones*.



Dr. James T. Brown, PMP is president of SEBA® Solutions Inc., a Registered Education Provider for PMI. To learn more about Dr. Brown, visit [www.sebasolutions.com](http://www.sebasolutions.com).



# ADVANCED TOPIC SEMINAR

SATURDAY, MAY 5, 2007

## How to Keep Your SOX on During a Project

Presented by Mike Graupner, PMP

The process is the project manager's best friend. A SOX audit impacts every element of your process and strikes fear in the hearts of even the bravest project managers. SOX affects your understanding of your project, adds SOX risks and controls, and changes the way you manage your project in a SOX world.

This presentation will focus on how to approach a project and avoid SOX surprises at the end. You will focus on understanding how your process feeds the SOX audits and how to identify the real requirements. Mike will use his real life experience in SOX auditing.

This course is targeted to project managers and managers and developers desiring to reduce their frustration and increase their understanding of the SOX requirements and how to meet them. The seminar is designed to give practical experience for working on a SOX related project.

From this presentation, you will learn the mission of SOX: financial reporting, knowing your process and the process benefits, key initiation points, key planning points, key execution points, key closing points, and key deliverables.

**Mike Graupner, PMP**, is a project manager and expert in dealing with SOX audits in the project management context. He is currently a project manager in the IS Governance Program with Prescription Solutions in Costa Mesa. In 2006, Prescription Solutions completed both the internal and external SOX audits without a single exception, for a clean 2006 audit of the internal controls. Part of his duties include acting as the central interface between the internal and external auditors and the IS organization.

Mike has held project management positions in GPS systems, test systems, secure communications development, and general IT systems development.

**Where:** Keller Graduate School of Management  
880 Kilroy Airport Way, Room 227, Long Beach, CA 90806

**PDUs:** There are four PDUs for this event.

**Cost:** In advance: \$45 members, \$50 non-members  
At the door: \$60 for both members and non-members

**Information:** [www.pmi-oc.org](http://www.pmi-oc.org)



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<b>Pomona</b>	909-868-4240	<b>San Diego</b>	619-683-2446

[www.keller.edu](http://www.keller.edu)

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## Coming Events

 **April 10 Dinner Meeting**

**Craig B. Smith, Ph.D.**

Building the Great Pyramid: PM 2550 B.C.

See page 1.

 **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 12 and 13.

 **April 28**

**PMP® Exam Prep Workshop Begins**

Laguna Hills, Costa Mesa and **BREA!**

See page 19.

 **May 3**

**Member/Volunteer Orientation**

UCI Learning Center, Orange, CA  
New date and location.

Watch [www.pmi-oc.org](http://www.pmi-oc.org) for updates.

 **May 5 Advanced Topic Seminar**

**Mike Graupner, PMP**

How to Keep Your SOX On During a Project

See column at left.

 **May 8 Dinner Meeting**

**Susan Powell**

Managing Your Finances as a Project

The most important project that you will ever manage is achieving your own financial goals! Come learn how to avoid some of the pitfalls that can cause you to swerve off the road to financial success.

 **May 10**

**Breakfast With Your SOX On**

 **June 2 Advanced Topic Seminar**

**Rudolf Melik**

Empower Your Project Workforce

Globalization and the nature of work have changed significantly in the last several decades. Learn how your company can reduce costs, leverage huge talent pools and execute challenging deliverables.

 **June 12 Dinner Meeting**

**Mike Gentile, CISSP and**

**Ron Collette, CISSP**

The Security Professional-

Project Management Relationship:

Preventing Another Hatfield and McCoy

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## Answers to PMP® Exam Questions

*From page 15*

1. c. **Conduct a design of experiments.**  
*PMBOK® 2004, paragraph 8.1.2.3, page 185 [Planning]*
2. a. **These factors, which are standards and regulations, are an input to quality planning.**  
*PMBOK® 2004, paragraph 8.1.1.1, page 184 [Planning]*
3. c. **The PDM schedule**  
*PMBOK® 2004, paragraph 11.4.2.2, page 258 [Planning]*
4. c. **\$410,000**  
Comparing the target cost (\$300,000) to the actual cost (\$400,000) shows a \$100,000 overrun. This overrun is shared 80/20 by the buyer and seller (the seller's share is the one shown last). In this situation, 20 percent of the \$100,000 overrun is \$20,000, which is deducted from the target fee of \$24,000, resulting in an adjusted fee of \$4,000. However, the contract sets the minimum fee at \$10,000. As such, the seller receives a fee of \$10,000 plus the actual costs incurred of \$400,000, for a total payout of \$410,000.

*Project Procurement Management, Quentin W. Fleming, pages 100 to 102 [Monitoring and Control]*

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# WANT TO BE PMP® CERTIFIED?

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Need qualifying education contact hours?

## PMI Orange County Chapter Announces its 2007 Spring Course



## PMP EXAM PREPARATION WORKSHOP

**Six Saturdays Beginning April 28, 2007**

This workshop is intended for anyone who wishes to achieve their PMP certification, who meets the requirements as identified by PMI® (see <http://www.pmi.org/certification>), AND who has studied recommended PMI project management literature, specifically, the third edition of the PMBOK® Guide.

**This workshop will help you prepare for exam success, and will provide you with the eligibility requirement of 35 contact hours in project management education.** Participants will be provided with a classroom discussion guide and a supplemental text that includes study questions on CD-ROM. Also, participants will have access to additional study material.

**When: Six Saturdays\* from 8 a.m. until 5 p.m.**

<b>April 28</b>	<b>May 12</b>	<b>June 2</b>
<b>May 5</b>	<b>May 19</b>	<b>June 9</b>



**Where: Laguna Hills**

**Holiday Inn**  
Laguna Hills  
25205 La Paz Road  
Laguna Hills, CA 92653

**Costa Mesa**

**University of Phoenix**  
South Coast Learning Center  
3150 Bristol Street  
Costa Mesa, CA 92626

### PMP Exam Prep Workshop in BREA!

**Brea Community Center** (April 28 only)  
1 Civic Center Circle  
Brea, CA 92821

**Embassy Suites** (May 5-June 9)  
900 East Birch Street  
Brea, CA 92821

**Cost:** The workshop fee is per participant, payable at the time of registration. Classes fill very fast, so get your registration and money in early to guarantee a seat.

**Register by April 15 to receive a special discount!**

- **PMI Member: \$750 before April 15, \$800 after April 15**
- **Non Member: \$850 before April 15, \$950 after April 15**

**Register at [www.pmi-oc.org](http://www.pmi-oc.org)**

**Information at [www.pmi-oc.org](http://www.pmi-oc.org) or e-mail [programs@pmi-oc.org](mailto:programs@pmi-oc.org)**



***Note:** This course is NOT intended to teach the participant project management or to impart project management industry experience. Its primary purpose is to prepare the participant for the PMP exam based on the PMI identified domains and PMI recommended preparation material.*

*\*Dates subject to change.*

## PMI Orange County MILESTONES

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# PMI-OC Dinner Meeting

## Tuesday, April 10, 2007

Program **Craig B. Smith, Ph.D.**  
Building the Great Pyramid: Project Management 2550 B.C.

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>		<i>At the Door</i>	
	\$15.00		\$15.00

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, April 8, 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, April 8, or anyone who makes a reservation and does not attend, will not receive any refunds.

# Breakfast with Your SOX On

## Thursday, April 12, 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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