



SEPTEMBER 2007 • Volume 19 • Number 9

September 11 PMI-OC Dinner Meeting

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Extraordinary Results Through Intuitive Leadership



Karen Storsteen, M.S., is the president of Performance by Design, LLC, a management consulting and leadership development company.

Karen is also a psychotherapist. For over 20 years, she has coached some of the top executives in the world, doubled the value of organizations in six months, increased productivity by over 190 percent, and improved employee and customer satisfaction.

Karen has been recognized by Microsoft Corporation, Mobil Oil, OSHA and the past Colorado Commissioner of Education.

She has also created curricula for corporate universities and educated thousands of individuals in the area of leadership and human development.

This highly experiential, innovative, and interesting dinner presentation by **Karen Storsteen** will enable project managers to:

- Learn the benefits of trusting their intuition through research on world leaders and quantum physics,
- Learn how to improve self awareness, creativity and leadership power and move past inhibiting performance patterns,
- Apply various methods to access their intuition to gain clarity in work and life.
- Resolve a problem or make a decision affecting their projects by more fully utilizing both left and right brain functions.

This interactive presentation integrates psychology, intuition, psychophysiology, quantum physics, management, and sound. Participants will leave with a lasting experience to improve their project management capabilities.

Vendor Showcase: Dekker, Ltd.

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Candidates

for 2008 Board of Directors

August 22, 2007

To the PMI Orange County Chapter membership:

The PMI-OC Nominating Committee recommends the following candidate slate for the 2008 PMI-OC Board of Directors:

Chair/President:

Victoria Flanagan

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Sylvan Finestone, PMP

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Marketing Director:

Linda Keller, PMP

Membership Director:

Cornelius Fichtner, PMP

Operations Director/Secretary:

Nora Goto, PMP

Programs Director:

Renata Weier

The Nominating Committee selected this slate from a pool of highly qualified applicants who have demonstrated a commitment to the chapter. Each candidate submitted a questionnaire and resume to the committee. The applicant questionnaire responses were reviewed, discussed, and evaluated relative to the applied position. The Nominating Committee also validated the current membership status of each applicant.

Bios, photos, and candidate statements will be available for your review on the electronic online election site when the election period opens on September 15.

Check www.pmi-oc.org and your *E-Mail Blasts* for more election information and instructions.

The Nominating Committee thanks all applicants and encourages each chapter member to participate in the upcoming election.

2007 Nominating Committee
nominations@pmi-oc.org

Glen Fujimoto

Mike Graupner, PMP

Kristine Hayes Munson, PMP

Adrienne Keane, PMP

THE CHAIR'S COLUMN



Ten Steps to Becoming a PMP

On September 15th, **Mike Graupner, PMP**, and his volunteer team will kick off three consecutive PMP® workshops in Costa Mesa, Laguna Hills and Brea.

Over the years, these workshops have helped hundreds attain PMP status. About twice a month, I receive a phone inquiry about “the best way” to become a PMP. I recommend the following ten steps:

Step 1: Read the *PMP Credential Handbook*. The *PMP Credential Handbook*, available at www.pmi.org, explains in detail the process of becoming PMP certified. Reading it should be the first 20 minutes on your PMP certification journey.

Step 2: Make sure you are eligible. The *PMP Credential Handbook* details your eligibility. Depending on your educational background, you must show 4,500 to 7,500 hours of project management experience and 35 hours of project management related training.

Step 3: Become a PMI® and PMI-OC Member. Becoming a member makes financial sense. Members receive substantial discounts on the PMP exam and PMI-OC events, particularly our PMP workshops. In fact, the discounts are bigger than the membership fees.

Step 4: Sign up for the Exam. “I want to become a PMP” is a good plan. “I want to become a PMP, and my exam is in three months” is a much better plan because we all work a lot better when we have a deadline. Sign up online via the PMI website.

Step 5: Read the *PMBOK® Guide*. Twice. Seventy-five percent of PMP exam questions come from the *PMBOK Guide*. You must know it. And the only way to know it is to read it twice.

Step 6: Read a PMP Preparation Book. To learn about the 25 percent not covered in the guide, you need third party products like PMP prep books or online self-study courses. Many PMI-OC chapter members offer such products through their own companies. These products will also “translate” awkwardly described *PMBOK Guide* concepts and give examples from everyday project management life.

Step 7: Attend a PMI-OC PMP Workshop. I can personally vouch for the quality of our workshops. I passed my exam on the first try thanks to what I had learned during this six Saturday workshop. Sign up on our events page at www.pmi-oc.org.

Step 8: Answer Sample Questions. Successfully passing any test means knowing what you will be asked. The PMP exam is no different. Answer as many free and commercial PMP sample questions as possible and keep score. The rule of thumb is that if you consistently answer 80 percent correctly, then you are ready to take the exam.

Step 9: Study Hard and Have a Plan. Studying for the PMP exam is a serious endeavor and requires personal dedication. Manage your road to becoming a PMP like a project, and create a plan: a study plan. It defines how many hours you study, how many chapters you read and how many sample questions you take every day.

Step 10: Take the Exam. After all that hard work, taking the exam almost sounds like the easy part. Consider the following to make the day of the exam a successful experience. Get a good night's sleep the night before. There is no need to study until 3:00 a.m. You have studied long and hard, and you are ready for it. Bring two forms of official identification with a photo, water, snacks, a sweater, a simple calculator and earplugs with you to the exam site. Before the exam, take the short tutorial explaining how to use the computer. Now click the “Start Exam” button. Good luck!

Finally, be prepared for ups and downs in your studies. Some concepts will be easy for you to comprehend, and others will be hard. Don't despair or think that you are never going to understand them. Thousands of people have passed the exam before you, and you can pass it, too!

Cornelius Fichtner, PMP, Chair/President

Studying project management at Harvard is like learning to drive from your car's user manual.

Changes

A famous quotation is, "The more things change, the more they stay the same." Well, it's hard to argue with that because it has been quoted so many times.

Your membership team is changing. We are bringing new people with new ideas and new experiences on board. In this month's article, we will introduce you to the new team members. Over the next few months, please introduce yourselves to our new volunteer leaders, and let them know of your interests.

If you were at the dinner meeting in August, you have already experienced the outgoing personality of Volunteer Coordinator **Ralph Dutra**. Ralph brought new energy to the Volunteer of the Month award with his dynamic and fun filled presentation. See photo below of Ralph (right) presenting the award to Bob Pettis. Ralph has grabbed the reins of the volunteer coordinator position and is breathing new life into the effort. Welcome aboard, Ralph, and thanks for stepping up.

Our ambassador program is regaining its previous high energy with the addition of **Lori Shapiro, PMP**, and her key assistant, **Brenda Breen**. These two ladies, both of whom have held high positions in a parallel organization, have joined the PMI-OC team. Lori is leading the effort to invigorate and expand our ambassador program, while working to identify our future leaders.

In membership retention, where we retain only 60 percent of our membership at renewal time, **Joe Paradiso, PMP**, who has ably represented us in the member/volunteer orientation events is now joined by **Lilly Brady, PMP**, and **Lillian Sibley**. This three member team will be working on our membership retention project, contacting members and encouraging them to rejoin us each year.

We have high hopes that these dynamic changes will lead us away from the expectation that no matter how much we change, things will stay the same.

Sylvan Finestone, PMP

VOLUNTEER OF THE MONTH

Robert Pettis, PMP

Bob Pettis has been a member of PMI-OC since 2002. He gained early project management experience when he planned and organized fun filled events as a Cub Scout leader.

Bob has volunteered in a number of roles. Most recently, he helped with our popular advanced topics seminars and the Neal Whitten event. He also finds time to teach PMP® prep classes each quarter.

Bob's project management career involves working with industrial power systems, electronic instruments, and large computer peripherals. He also handles some projects independently for small businesses in Colorado, where he lived before moving west. He earned his PMP® in 2004.

For recreation Bob likes bicycling and a wide range of music, including classical and new age, which he enjoys when he's not on his bike. He is presently enrolled in a certificate program at UCI for medical device product development, which includes FDA regulations and processes and ISO quality standards.

Regardless of the nature of the project, Bob believes in delivering a well managed project on time, within budget, and with all of the pieces in place through careful planning and efficient use of resources. Bob suggested that a project manager is like a map maker who charts a course for reaching a destination.

Bob summed it up nicely when asked about his PMI-OC experience. "It has provided an opportunity for sharing information, experiences, and fellowship with others in the same profession." Bob went on to say that he benefits from volunteering by learning new skills, as well as practicing and improving on what he already knows. Thanks, Bob!

Ralph Dutra



Volunteer Opportunities

Membership Director:
membership@pmi-oc.org

Spark of Love Toy Drive Coordinator
Assist the membership director in organizing the Spark of Love toy drive, which supports the Orange County Fire Department's toy distribution to less privileged children during the holiday season.

Programs Director:
programs@pmi-oc.org

Dinner Meeting Host
Host the event, introduce speakers, and make special announcements as specified in the meeting agenda. Position requires a public speaker who can host a large dinner meeting.

Hotel Dinner Meeting Coordinator
Communicate dinner meeting guest counts to the hotel. Coordinate with wait staff during the dinner to ensure all paying members receive meals. Collect business cards and assist with the raffle.

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

PowerPoint Coordinator
Create the automated PowerPoint presentations from various sources for display at PMI-OC events.

Raffle Coordinator
Organize raffle prizes for the dinner meetings. Prizes are a combination of purchases and in-kind donations. Assist with the raffles at the dinner meetings.

Finance Director/Treasurer:
finance@pmi-oc.org

Accounts Receivable
Create invoices, log in payments and follow up with payment assistance. Knowledge of accounting process is helpful, but accountant or CPA status is not required. Familiarity with Excel is a must, and QuickBooks experience is a plus. Customer service skills are required. This is a chance to learn about the finance process if interested in a future finance director position on the board.

Chair/President: chair@pmi-oc.org

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



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2006 PMI-OC Project of the Year Award

Leading the Way in Electricity



Edison SmartConnect™



SCE's smart metering brings customer experience and energy usage into the digital age.

After contacting 100 companies and spending numerous hours comparing projects, the **Southern California Edison SmartConnect Advanced Metering Infrastructure (AMI) Project** was selected as the **PMI-OC 2006 Project of the Year!**

Honorees representing the winning SCE team at the August 14th dinner meeting were **Paul De Martini, Paula Campbell, Jeremy Laundergan, Mehul Desai, and Paul Kasick.**



Paula Campbell, Edison SmartConnect PMO Manager, presented an overview of the project's objectives, challenges, and successes with an attitude of both confidence and humility. Her analysis of the project reminded me of an affirmation that I often apply, "Turn your negatives into positives." She stated that the first challenge of the project was to overcome the negative impact of a previous business case which resulted in a minus \$900 million cost analysis. Her team had to create a positive mindset to demonstrate the "art of the possible" by exploring features and functionality that would generate greater benefits and cost saving for the customers, company, and the government. After eight months of hard work, the AMI project team presented a plus \$109 million cost to benefit ratio.

Additional project challenges included defining the technical requirement for AMIs, developing architecture to meet requirements, and developing the management framework for overall deployment. Using PMP® methodology, AMI Phase I was the initiation and planning stage for the six-year project. SCE used a systems engineering approach to produce the technical requirements and deliverables. It involved creating positive business cases, including a matrix of 160 subject matter experts (SMEs) from various operations departments. The SMEs participated in 18 "use cases" and 44 workshops. The results were used to develop a conceptual architecture describing how the AMI system is expected to perform, as well as to determine its practical end uses and functionality.

Paula stated, "To ensure your project's success, it is necessary to **plan, plan, plan.**"

In addition to the program management controls previously discussed, the team used:

- **Scope:** Use case development and rigorous trade-off analysis,
- **Schedule:** Use of earned value methods to ensure timely completion of use cases and architecture deliverables,
- **Budget:** Top down budget controls through separate regulatory accounts,
- **Resources:** Hybrid of dedicated program personnel and a matrix of SMEs to build bottom-up design and requirements for the system, which led to positive ownership of the program at the working level.

According to Paula, the "use cases" were a major attribute of the project's success because they included versatile skill sets from top level management, information technology, engineering, vendors, administration, procurement, customers, and even the meter readers. Their contributions encouraged ownership, which simply enhanced the desire to meet the project's objectives. This fact was demonstrated by the vendor who at first did not have much faith in the project, yet by the end of Phase I, developed a state-of-the-art prototype smart meter at no cost to SCE. That speaks volumes and exemplifies the power of teamwork and proper project management.

Paula also conveyed "lessons learned" from Phase I. First, establish partnership with key stakeholders, i.e., IT and procurement departments, whose resources may be limited, but vital to your project. Second, understand new infrastructure changes and always create and maintain excellent rapport with a network of PMO leaders. From a project management viewpoint, you may ensure this by creating and utilizing an agreed upon communication plan. Third, always remember to highlight the value of team members by acknowledging their vision and contributions. Last, celebrate victories, both small and large.

Overall, Phase I (research) of the three part AMI project was successful. The results were universally positive. Its success drove the industry to derive the product earlier than expected by changing the organization's and industry's perception of AMIs.

Continued on page 6





Above, left to right: Chandra Vempati, PMP, PMI-OC Project of the Year Team; honorees from SCE: Paul Kasick, Paula Campbell, Jeremy Laudergan, Mehul Desai; Brent Felsted, PMP, PMI-OC Project of the Year Team Leader. Not pictured: Paul De Martini from SCE.

It also changed public utilities and governance processes, as well as state and federal policies. As a result, the California Public Utilities Commission approved a \$45 million grant for SCE to complete the AMI project, estimated completion date (ECD) 2012.

SCE will replace approximately five million small commercial businesses' and residential customers' analog and electric meters with an innovative two-way communication system. The smart metering systems will bring customers and energy usage into the digital age. They will allow customers to manage and monitor their utilities usage. AMIs will make history and provide more reliable services. SCE will preserve the environment via green building technology, such as smart thermostats and grids. Therefore, Phase II (development) and Phase III (deployment) will focus on developing, testing, and installing the AMIs.

Implementing AMIs will allow SCE to improve customer service by being able to determine which customers have reduced energy usages by buying smart appliances and/or installing solar panels. They will be able to provide credits and cost reductions immediately. Also, new data management features such as connecting and/or disconnecting customers from the office, will be available.

Although implementing the AMI systems will eliminate over 600 meter readers' jobs, SCE has taken a proactive approach to re-train and assist in finding other career opportunities.

This is another example of teamwork and going "above and beyond the call of duty" to ensure a successful project.

Listed below are the overall accomplishments of Edison SmartConnect AMI Project:

- SCE successfully completed Phase I five months ahead of the original 18 month schedule.
- The project came in under its \$12 million budget by approximately \$1 million.
- Vendor collaboration resulted in next generation meter products for SCE lab testing without direct investment.
- The project developed positive conceptual business cases.
- The project changed organizational and industry perception of SCE smart metering to industry leaders.
- The project implemented new program controls and governance processes to prepare for Phases II and III.
- SCE has filed a successful application with CPUC for Phase II.

In addition the PMI-OC 2006 Project of the Year award, the Edison SmartConnect Project also won the **2007 Smart Grid Outstanding Leadership Award from the US Department of Energy.**

In conclusion, after successfully providing service to 13 million customers for 120 years, SCE definitely set the bar by introducing new and cost-effective energy management technology and by effectively using project management methodology.

Rosie L. Coleman, PMP



At the August Dinner Meeting



New PMPs Jon Kawai, Arun Gopalakrishnan, and Charlotte Salisbury



Toni Childers from Southern California Edison, vendor showcase for August

Project of the Year

A JUDGE'S VIEW

For the past three years it's been my privilege to be a judge for the PMI Orange County Chapter's Project of the Year. While the exact methodology is confidential, the general criteria for evaluating a candidate are a combination of the PMBOK® guidelines and common sense:

- First, was the project successful? Did it meet or exceed the sponsor's requirements? Your performance against the triple constraint is always a good measurement.
- Next, we look for project innovations, particularly in the actual project management (as opposed to the technology) in the result. These innovations often come from difficult and/or unusual requirements.
- Of course, the project will be evaluated against the nine areas of knowledge in the PMBOK®. It always helps to check your performance against all nine; in the Project of the Year competition it's essential.
- Project complexity is also a factor. This is the area most open to individual judgment. Some of the factors in this might be difficulty in location, engineering complexity, or strange schedule dates. "One of a kind" difficulties can set a project apart.

For the most part, the "wow factor" doesn't have much impact. If you made the local news doing something simple, that doesn't help. On the other hand, one of our winners was a racing yacht. In that instance, the fact that the yacht was successful in competitions (and heralded as such) was an important criterion.

What's it take to submit a project?

Each year the chapter requests submissions for the Project of the Year. If you decide to do this, you will receive a rather lengthy set of documents. This will give guidelines for the submission, plus other forms which need to be filled out to deal with such issues as confidentiality. The intent of this competition is to produce examples of excellent project management for the membership; therefore, the information submitted should not be subject to competitive or government security constraints. Remember, you want to be the person presenting to the chapter, and most of us don't have security clearances.

Should I submit a project?

In general, I would encourage you to do so. At the very least, it will serve as an exercise in self-evaluation. While evaluating these projects, I find myself reviewing my own projects for areas of improvement. To actually go through the submittal process would produce an objective look at your work.

Don't underestimate the workload. This is not a trivial application. It's also one that the project manager will not be able to complete alone; you'll need to work with your team members to get it right. I know of at least one instance where the nominee decided that the application process was a great deal of work. That, combined with a quick evaluation, convinced them to withdraw from the competition. But as a result several improvements were made in their project. Even if this is your result, it would still be worth the effort. I encourage you to do so.

John Hendershot, PMP

Test Your Knowledge on PMP Exam Questions

Answers are on page 14.

Here is a sample of some questions:

1. You have been assigned to manage a project that could determine the survival of your company in the next five years. Project success would mean a promotion, a generous bonus and a sizable stock option for you. If the project fails, the company may go under, and you would be out of a job. You have therefore concluded that project success requires that you have maximum control over all project resources. Which form of organization would be best suited for this project?
 - a. Project coordinator
 - b. Functional
 - c. Weak matrix
 - d. Projectized
2. A project management plan can be composed of one or more subsidiary plans. Which of the following is not typically considered a subsidiary plan?
 - a. A cost baseline
 - b. A resource calendar
 - c. A request for proposal
 - d. A risk management plan
3. In the process of preparing a project plan, you have identified the need for a key subject matter expert (SME). Her experience and skills would be invaluable to the success of the project. However, you are not given a specific date as to when she would be available, but rather a series of dates ranging over a three week period. To complete the plan, you have assumed a specific start date for the SME. Assumptions generally involve an element of risk because they:
 - a. Involve factors that limit the options available to the project.
 - b. Involve factors that, for planning purposes, are considered to be true real and certain.
 - c. May determine the outcome of the project.
 - d. Are based on lessons learned from previous projects.
4. The number of potential communication channels for two stakeholders (A and B) in a project is one (1), for three (3) stakeholders it is three (A and B; A and C; B and C). Thus, for a project with nine (9) stakeholders, the number of potential communication channels is:
 - a. 27
 - b. 45
 - c. 18
 - d. 36

At the August Dinner Meeting



Jerry Ferguson, PMP; Craig Wilson, PMP; Eric Plummer, PMP; and Brian Luttrell, PMP



Ildikó M. Von Rűden, PMP (left) and Bobbi Horowitz, PMP (right)

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Getting Your Project Off on the Right Foot

Requirements engineering is well known as a critical factor in the success of any project. A 2002 study by the National Institute of Standards and Technology reports that unreliable and unsecured software costs the economy **\$59.5 billion annually** in breakdowns and repairs. These costs show that there would be a high value to even a small improvement in this area. By the time that an application is fielded and in its operational environment, it is very difficult and expensive to make significant improvements.

At the August 4th advanced topic seminar, **Lois Zells** presented an interesting approach to project management that will reduce the total cost of testing to five percent or less and aid the organization in moving toward process maturity and continuous improvement.

Lois advocated that, in her opinion, these criteria make for a successful project:

(1) Know who the customers are. **(2)** Prioritize customer influence. **(3)** Get agreement on scope. **(4)** Plan a speedy test phase. **(5)** Be sure you have the right focus. **(6)** Get agreement on completion criteria. **(7)** Climb out of the scope of definition tar pit.

Lois revealed her insightful approach to making intelligent, quantified decisions about project prioritization and resource allocation for project success by mapping critical success factors to the business priorities, and ultimately the applications.

Lois recommends a launch phase at the beginning of the project. This phase builds the foundation for change management and allows prioritization of user influence, features, and functions, and establishes a clearly defined analysis effort. The launch phase provides:

- Identification of the domain of study and interfaces by name, group and title at implementation to ensure the interface will work.
- An affinity diagramming technique to organize the WBS with a view toward translating requirements into features and features into functions.
- The right focus and agreement on completion criteria with the end users, which is crucial to project success.
- Focus on the three dimensions of customer satisfaction:
(1) What they tell you. **(2)** What they take for granted. **(3)** What truly excites them.

Benefits of this approach include identification of release candidates, a basis for schedule reduction, a framework for requirements traceability, and reinforcement of front end emphasis.

Lois explained the use of clearly defined phase containment through inspections and testing of the resulting specifications in the project launch, requirements analysis, and implementation modeling phases. Inspections would consist of inspecting the deliverable, testing the deliverable, reviewing the process used to produce the deliverable, and reviewing the process used to produce the test data.

There must be full agreement on the completion criteria for each step in the process and a firm plan in place defining how and when the groups will finish the requirements.



Being in control of scope requires changing current thinking on development in general and on project size. Specifically, one must understand the difference between building and managing the phases of development and their completion criteria.

Project size is composed of an agreed upon finite number of functions called "breadth," and each function has a certain complexity called "depth." While breadth is known almost as soon as the project starts, depth is not known until the team has had time to gain full knowledge of the complexity.

In conclusion, Lois suggested a method to achieve the goal of creating a complete set of stable, predictable, repeatable, reusable and reliable software engineering processes that come out right the first time and every time.

Renata Weier, PMP



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Top of page: **Lois Zells** in action.
Above: **Monica Celnar, PMP**, clarifies a point with Lois.
Photos by Louie Chanco, PMP

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PMI-OC MEMBER/VOLUNTEER ORIENTATION TRAINING

The eleventh PMI-OC Member/Volunteer Orientation Training was held July 18 at the UCI Learning Center near The Block at Orange shopping area. The committee has determined that attendees prefer this location over the main UCI campus, and we will try to reserve it for future events.

Approximately 26 participants and six volunteers attended, and all appeared to be interested in learning what the chapter has to offer. Most of the attendees were new members. However, there is always a significant number who have been members for months, or even years, and have never attended one of these events. For this reason, even if a member has been with PMI-OC a long time, but has never attended an MVOT session, I encourage them to get engaged at the next meeting, which will be Tuesday, September 18th.

The PMI-OC Member/Volunteer Orientation Training is the best way that I know to orientate new members with PMI® and PMI-OC benefits. It's also a good way to meet directors and volunteers, as well as to network with other members. This event is an opportunity for new and returning members to learn in depth what PMI-OC has to offer. More importantly, it offers information about the benefits of becoming a volunteer.

Although the meetings are very similar in presentation and content, the varied personalities and backgrounds of the attendees create a dynamic atmosphere and compelling conversation at every event. Each meeting is designed to help members feel comfortable by allowing them to express their career experiences and get feedback from the directors and other members.

Membership Director **Sylvan Finestone, PMP**, and Chair-Elect **Victoria Flanagan** jointly covered most of the topics, including what PMI-OC is all about, the many benefits of PMI-OC membership, volunteering and training. Earning PDUs is always a hot topic. Sylvan and Victoria explained some of the many ways a PMP® can easily earn them. They also mentioned the three very prestigious awards that the chapter received at the 2006 PMI Global Congress. (See January 2007 *Milestones* for specifics.)

Melanie McCarthy from ResourceXperts was there, as always, to present networking techniques directed at finding that perfect opportunity. Her dynamic presentation kept everyone's attention. Melanie listed several valuable networking tools that everyone should be know: (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.

If you haven't seen Melanie's presentation, you owe it to yourself to attend an MVOT session for that topic alone. It could help you land that next high paying and rewarding position you have been looking for.

Understanding the dots is another topic that is always covered. PMI-OC uses colored dots on the name badges to assist in networking at various events, including the monthly dinner meetings. One of the duties of the ambassadors is to insure that new members are introduced to various chapter volunteers and directors. At your next PMI-OC event, look for these dots. They can be a valuable tool in networking:

- **Red:** New Member
- **Green:** First Time Attendee
- **Blue:** Looking for Opportunities
- **Yellow:** Know of Opportunities

The meeting concluded with questions and answers of all types and ample opportunity for attendees to speak one-on-one with each other, directors, and membership staff.

The meeting location is easy to find by following the directions in the notice at the right and on the PMI-OC website. Those coming directly from work can always expect plenty of top quality food and soft drinks.

Joe Paradiso, PMP
Membership Committee Chair



Photos by Steve Goto, PMP

Tuesday, September 18

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.

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.

When:

Tuesday, September 18, 2007

6:00 p.m. to 8:30 p.m.

Registration will begin and food will be served at 6:00 p.m.

Program starts at 6:30 p.m.

Where:

UCI Learning Center, Orange, Rm. 203
200 South Manchester Avenue
(Corner of Chapman and Manchester)
Orange, CA 92868

A map can be found at the following URL:
<http://unex.uci.edu/services/contacts/locations/ucilc/>

Cost:

None. Parking is free, but required permits are available on the second floor.

Register:

www.pmi-oc.org

Please register early. Space is limited to the first 40 members.

Questions: membership@pmi-oc.org



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 NORTH AMERICA 2007

October 6-9, 2007
 Atlanta, Georgia
 The Georgia World Congress Center and
 The Hyatt Regency Atlanta

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PMI Global Congress 2007—North America is the premier event in the project management profession. This is an excellent opportunity for you to advance your project skills by learning new approaches and technologies and by networking with fellow project management practitioners throughout the North American region. Explore the possibilities to:

- Earn professional development units (PDUs) toward maintenance of your PMI credentials.
- Participate in networking events to share ideas with colleagues and expand your network.
- Attend educational programs with over 150 presentations in more than 12 content areas.
- Visit the exhibition hall for engaging presentations and demonstrations about new project management products and services. Learn from leading industry providers and earn additional PDUs..

For more information and registration:
<http://congresses.pmi.org/NorthAmerica2007/>

Open House

Saturday, November 10

Come to a day-long open house sponsored by the PMI-OC Dinner Meeting Committee on **Saturday, November 10** and gain real world project management skills!

What: The PMI-OC Dinner Meeting Committee invites you to an exciting brainstorming session! We need 15 participants, **first come, first served.**

Want to sharpen your project management skills? Here's your chance!

Why: This session will be a one-day event where you will learn hands-on project management skills. You will participate in a brainstorming session and work on a real project. You'll see full implementation from start to finish.

PDUs: You can receive six PDUs for this event. This experience is a great addition to your resume.

When:
 November 10, 2007
 From 9:00 a.m. to 5:00 p.m.

Cost:
 This session is **FREE**.
 Breakfast and lunch included.

Where:
 University of Phoenix
 Costa Mesa

Questions:
 Go to www.pmi-oc.org or
 contact programs@pmi-oc.org.

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by Sept. 28



KNOWLEDGE. CONFIDENCE. RELIABILITY

The PMI Orange County chapter is fortunate. We have a large membership and strong volunteerism. The strength of the group is measured by the willingness of our members to step up to the plate and volunteer their time and energy toward building our chapter. Our members enjoy *Milestones*, the communications arm of our chapter. Many chapters do not deliver a formal newsletter, and many chapters that do deliver the content only online or via e-mail.

We have been struggling with the future of *Milestones*. Should we continue to deliver this content both in a printed, paper-based format and electronically? Should we discontinue the printed and mailed newsletter? Should we deliver the newsletter via e-mail or post it on our website? Should we create a blog or community where members post their own content?

The reason for this discussion is that, as you probably know, postage rates continue to increase. The last mailing of *Milestones* experienced an increase of over \$500 in postage expenses for the chapter.

Every year the PMI-OC Board of Directors has considered scaling back the printed version of *Milestones* because of the increasing costs to produce and mail the newsletter. Each year, the decision has been made to retain the printed and mailed version of our newsletter, as the board views the printed newsletter as a tangible benefit to PMI-OC members. Furthermore, other PMI® chapters that have changed to an online only newsletter, have experienced a negative response from their membership.

We would like to poll the members of our chapter about the future of *Milestones*.

Please log onto www.pmi-oc.org/notices/MilestonesQuestionnaire.doc to download the survey or go to www.pmi-oc.org and click inside the PMI-Notices pane. Fill out the survey and e-mail it back to editor@pmi-oc.org.

Return your questionnaire in September, and become eligible for a raffle prize from the PMI-OC logoware collection.

Thanks for your help.

The Milestones Editorial Team
Cynthia K. West, Ph.D.
www.projectinsight.net



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with a panel of experts discussing best practices.
Wednesday, September 26th, 5:30 to 7:30pm
Please RSVP to Sara at: smatin@keller.edu

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Mr. CAP “M”

Section 1.5 is a Challenge



A series of columns by
Frank P. Reynolds, PMP

Consider this excerpt from
PMBOK® Guide section 1.5 on
page 12:

“... [It] is important that the project management team has full knowledge of the *PMBOK® Guide* and is conversant in the knowledge of the Project Management Body of Knowledge and the other four areas of management to effectively manage a project.”

CAPM® candidates often work as subject matter experts. They'll become increasingly involved as members of the project management team. For freshly graduated candidates, the following topics are daunting. Candidates who are professionally trained SMEs will have a greater knowledge in many of these areas. Even the most seasoned PMP® is not expected to be an expert. This is why many specialties contribute to projects. Yet all team members need some common understanding.

1.5.1: Project Management Body of Knowledge.

1.5.2: Application Area Knowledge, Standards and Regulations. Each individual contributes to these topics. Their education, training, and specialty certifications help them contribute to project success.

1.5.3: Understanding the Project Environment. Each participant represents a challenge and a resource. They bring cultural, social, international, political, and physical contexts to the project environment.

1.5.4: General Management Knowledge and Skills. Take a look at the ten bulleted disciplines in this entry. It almost looks like an MBA curriculum. In both obvious and subtle ways, these topics underpin the six performance domains.

1.5.5: Interpersonal Skills. Communication, organizational influence, leadership, motivation, negotiation, and problem solving have their roots in the idea of organizations as “going concerns.” These topics take on extended meanings in temporary projects causing organizational change through uncertain means and risky outcomes.

CAPM candidates need exam taking skills to discriminate between project expertise and general management expertise. Most study programs underestimate the challenges to CAPM candidates.

Budapest, Hungary, May 2007

Project Managers with a Global Mindset

PART TWO



Pan Kao, PMP

In a previous article, I discussed how my personal leadership journey was shaped by the influences of global competition and cultural diversity. Whether we like it or not, we are all affected by global competition, even if our focus is on local activities. Embracing cultural diversity is key to competing in the new global marketplace, and project managers who can develop a global mindset now will be at the cutting edge of project management in the twenty-first century.

Most multi-national manufacturing companies have embraced a global perspective to survive. They constantly readjust their global production strategies and resources to remain competitive in both cost and quality. What has changed, however, is the power and role of the individual within the global marketplace. In his book titled *The World is Flat*, Thomas Friedman states that speed and a flat organizational structure are the two key factors for success in a flat world. Mr. Friedman argues that, in a flat world, individuals can compete with multi-national corporations by using technology, e.g. the Internet.

Furthermore, individual purchasing habits are shaping global competition. For proof, we need look no further than our own spending habits. We eat Mexican food for lunch; our clothes are from China; our watches are from Switzerland; our shoes are made in Italy; and we drive a Japanese car. In Kenichi Ohmae's book, titled *The Borderless World*, the author asserts that consumers vote with their wallets in the showroom and leave politics and election campaigns behind.

In this rapidly changing and highly competitive market, project managers need to incorporate a consumer-centric global mindset into their project planning and learn to leverage global resources to maximize value and performance. How can project managers develop this perspective? PMI®, with its wealth of diverse local chapters and members, can help!

International Conferences: PMI organizes four annual Leadership Institute meetings, four Global Congress conferences, and four SeminarsWorld® events. These are held throughout the world, and members are free to attend any they choose. In addition, PMI regularly holds meetings and conferences to discuss issues of common interest among its members.

Volunteering Opportunities: In addition to the above meetings, PMI also acts as a disinterested third party to resolve problems among businesses, governments, and non-profit sectors. As an advocate of global standards, as well as a conduit of current developments, issues and ideas, PMI facilitates discussions among professional project managers of varying backgrounds. Most of these events are driven by volunteers, and opportunities abound to expand your knowledge by serving.

Networking: All of the above present unparalleled opportunities to network with fellow project managers in a myriad of roles and responsibilities. This can provide not only an opportunity to look for a better position, but an excellent opportunity to learn how other PMs manage their projects.

Since the "face" of PMI is usually found in our local chapter, it becomes incumbent on each chapter to develop a global mindset in its membership. Local chapters need to encourage their members to embrace the challenges of global competition and prepare them to lead the way into a new era.

NEW MEMBERS

Meetali Agarwal	Dennis Malone
Alan Aguilar	Linnaea Marvell
Kerry Anderson	Peter Milner
Emma Barnum	James Nelson
Tricia Carrillo	Kasey Nielsen
Run Chen	Sandra Quinones
David Joseph Chung	Eli Ralston
Cynthia Clemons	Marta R. Rodriguez
Kathryn Coggan	William Rider
Kevin Cole	Steve Rosenberg
Chad Curtis	Eric Taylor
Ann Dailey	Kevin Tory
Deron Dong	Christine Tran
Isaac Gaulden	Mary Wiseman

NEW PMPS

Alicia Grundy	Angela Ahern
Mary Hoover	Vipul Bhavsar
Lauren Hunt	Jana Chantarapan
Mohd Khan	Dave Cornelius
Nayaz Khan	Pamela Loree
Pankaj Khurana	Lori Shapiro
Michael Leih	
Geoff Liakos	
Steven Lovett	

Answers to PMP® Exam Questions

From page 7

1. d. Projectized

PMBOK® 2004, paragraph 2.3.3, page 28 [Planning]

2. c. A request for proposal

PMBOK® 2004, paragraph 4.3, page 88 [Planning]

3. b. Involve factors that, for planning purposes, are considered to be true real and certain

PMBOK® 2004, glossary, page 352 [Planning]

4. d. 36

The total number of communication channels can be determined by the formula $(n)(n-1)/2$.

PMBOK® 2004, paragraph 10.1.2.1, page 226 [Planning]

ADVANCED TOPIC SEMINARS

SATURDAY, SEPTEMBER 8, 2007



Advanced MS Project: Hands-On Training

Presented by **Mike Graupner, PMP**
and **Gene Senecal, PMP** (unpictured)

Now that you have covered the basics of MS Project, **Mike Graupner** and **Gene Senecal** will walk you through the ten most common mistakes beginners make and help you build

easy to maintain and useful project schedules.

- Does your project plan have a mind of its own?
- Does it take more time to manage the project plan than the project?
- Is printing your project plan more complicated than cold fusion?
- Does recalculating the plan make the schedule take off faster than a race horse?
- Do your co-workers gather around and chuckle when you start up MS Project?
- Is the undo feature your best friend?

If so, come learn from the battle hardened veterans who have made these mistakes and more. This will be a four hour course combining lecture and practical application on how to use MS Project as a tool to manage your projects, instead of making you a slave to Microsoft. This class is intended for those familiar with MS Project. Because of the limited time available, we will not be able to teach basic MS Project operation in this class.

Mike Graupner, PMP, is currently a project manager with Prescription Solutions in Costa Mesa. In 2006, Prescription Solutions completed both the required internal and external Sarbanes Oxley (SOX) audits without a single exception, for a clean 2006 audit of the internal controls. Part of Mike's duties include acting as the central interface between internal and external auditors and the IS organization.

SATURDAY, OCTOBER 6, 2007



The End of Fairy Tale Beginnings

Presented by **Thomas Cutting, PMP**

This seminar will help you identify the **five antagonists you may encounter on your project** and show you how to move them away from their destructive paths.

Once upon a time . . . (1) Extreme Insurance Overview, (2) Wicked Step-Sponsor, (3) Troll Oversight Manager, (4) Bewitched Team Lead, (5) Technical Resource Ogre.

Thomas Cutting, PMP, is a senior principal consultant for Keane, Inc. with over 15 years of IT experience in the entertainment, retail, insurance, banking, health care and automotive fields. From programmer to project manager, business analyst to quality assurance analyst, Tom has first hand experience with the problems that teams face.

Tom's articles have been published in *Computerworld* and *InformIT*, and he has spoken at conferences for PMI®, Practical Software Quality and Testing (PSQT), and the Southern California Quality Assurance Association (SCQAA). He is a regular contributor to the *Project Management Learning Center*.

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

Coming Events

 **Sept. 8 Advanced Topic Seminar**

See column at left.


 **September 11 Dinner Meeting**

Karen Storsteen: Extraordinary Results Through Intuitive Leadership
See page 1.

 **September 13**

Breakfast With Your SOX On

See page 16.

 **September 14 SoCal Pharma LIG**

Breakfast Meeting

UCI Learning Center, Orange
Go to www.pharmalig.org for details.

 **September 15**

PMP Exam Prep Workshops Begin

Three locations. See page 16.

 **September 15-30**

2008 Board of Directors Election

See page 2.

 **September 18**

Member/Volunteer Orientation Training

See page 11.


 **Oct. 6 Advanced Topic Seminar**

See column at left.

 **October 6-9**

PMI® North America Global Congress

Atlanta. See page 12.

 **October 9 Dinner Meeting**

Lois Zells: Pitfalls of RAD, Agile/XP and Other Forms of Iterative Developments

 **October 11**

Breakfast With Your SOX On

 **October 13 Full Day Seminar**

Karen Storsteen. See page 17.

 **Nov. 3 Advanced Topic Seminar**

Marty Wartenberg

Treating Innovation as a Project


 **November 8**

Breakfast With Your SOX On

 **November 10 Open House**

Sponsored by Dinner Meeting Comm.

See page 12 or go to www.pmi-oc.org.

 **November 13 Dinner Meeting**

PMI-OC Leadership Institute Graduation

Dr. Jerry Brightman

WANT TO BE PMP® CERTIFIED?

Studying for the PMP Exam?
Need qualifying education contact hours?

PMI Orange County Chapter Announces Its 2007 Fall Course



PMP EXAM PREPARATION WORKSHOP

Six Saturdays Beginning September 15, 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.

Sept. 15	Oct. 13	Oct. 27
Sept. 29	Oct. 20	Nov. 3



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
Laguna Hills, CA 92653

**PMP Exam Prep
Workshop in BREA!**

Embassy Suites
Brea, North Orange County
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 Sept. 2 to receive a special discount!

- **PMI Member:** \$750 before Sept. 2, \$800 after Sept. 2
- **Non Member:** \$850 before Sept. 2, \$950 after Sept. 2

Register at www.pmi-oc.org

Information at www.pmi-oc.org or e-mail 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.*

Extraordinary Results through Intuitive Leadership 1-day Seminar, 8 PDUs



Karen Storsteen, M.S.
President, Performance By Design, LLC
Management Consultant, Psychotherapist, Leadership Educator

Karen has doubled the value of companies in six months, increased productivity by over 190%, and radically improved performance, employee and customer satisfaction. She is known for developing visionary leaders and facilitating organizational change and has been recognized by Microsoft Corporation, Mobile Oil, OSHA, and the past Colorado Commissioner of Education.

***“Your intuition is your personal guide and consultant.
It can help you with every step of your life.”***

**Gain clarity in work and life
Guide your team in the right direction
Make the right decisions, right now
Identify what is blocking you and your team from succeeding
Improve employee and customer satisfaction
Reduce stress and increase your energy, confidence and power
Effectively utilize your left and right brain
Do the work that you love!**

In this seminar you will:

Learn how Intuitive Leadership can lead to extraordinary results in business and life

Assess the degree to which you rely on your intuition today

Learn and experience methods to access and follow your intuition

Gain an understanding of the power of intuition through quantum physics and psychophysiology

Increase self awareness by uncovering unconscious patterns

Determine how you can increase your satisfaction at work

Reduce your stress level

Learning methods include:

Interactive presentation and discussion

Individual and group experiential exercises

Personal assessment and reflection

Guided imagery, intuitive decision making, and problem solving

Use your intuition in practice to:

Resolve unresolved issues affecting your projects

Make a decision, or gain greater clarity, to define your path among various alternatives

Help others make a decision or resolve a problem

More fully utilize your heart and mind

Saturday, October 13, 2007; 8:00 AM - 5 PM

National University, 3900 Harbor Blvd., Costa Mesa, CA 92626-1502

Cost

Members: \$100
Non Members: \$130
Walk-Ins: \$150 (By Check Only)



**Class size is limited and there might not be room for walk-ins, as pre-paid reservations will take precedence.
Please register at PMI-OC website <http://www.pmi-oc.org/events.asp>**

PMI Orange County MILESTONES

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MILESTONES is published for the members of the Orange County Chapter of the Project Management Institute for the purpose of notifying members of meetings, chapter activities, member accomplishments, and to provide information regarding project management in local business and government agencies. Advertising is welcome. However, its publication does not constitute endorsement by the chapter or the Project Management Institute.

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Please help us improve our communication with you by verifying your mailing and e-mail addresses on the PMI® website.

Please go to www.pmi.org/authentication/?s=false&r=www.pmi.org/Pages/default.aspx to check your membership information, mailing and e-mail addresses.

To access, you will be prompted for your PMI user name and password. If you do not know these, just continue to follow the prompts.

PMI-OC Dinner Meeting

Tuesday, September 11, 2007

Program **Extraordinary Results Through Intuitive Leadership**
Karen Storsteen, M.S.

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

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

Cost: **Dinner and Presentation**

In Advance:

Members \$30.00

Non-Members \$35.00

At the Door:

Members \$40.00

Non-Members \$40.00

Featured Presentation Only (Members and Non-Members)

In Advance \$15.00

At the Door \$15.00

Parking: \$3.00 per car

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

Make your reservation by 9:00 p.m. on Sunday, September 9, 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. Anyone who cancels their reservation after Sunday, September 9, or anyone who makes a reservation and does not attend, will not receive any refunds.

Breakfast with Your SOX On

Thursday, September 13, 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

Full breakfast buffet is self paid.

Parking is validated.



Project Management Institute

Orange County Chapter, Inc.

P. O. Box 15743

Irvine, CA 92623-5743