PMI® MILESTONES
ORANGE COUNTY CHAPTER

NOVEMBER 2007 • Volume 19 • Number 11

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November 13 Dinner Meeting

Seeing the Future of Leadership in the Present

Implications for Project Managers

Dr. Jerry Brightman will invite the audience to pay a brief visit to the future to see what great leadership will look like and to explore the implications this future will have for project managers around the world.

This dynamic presentation will be based on Dr. Brightman's own learnings from the Leadership Institute class participants he has worked with since 2001 and from some of the more seminal leadership experts of the twenty-first century, including **Peter Senge**, **William Drath**, **C. Otto Scharmer**, and **Jim Collins**.

The objectives of the presentation include:

- Demonstrating that the field of leadership is far more dynamic than previously thought,
- Integrating the fundamentals of organizational learning into the mindsets of project managers for greater success in their work in the future,
- Underscoring the importance of self-awareness as the primary foundation for leadership in project management,
- Demonstrating that leadership is far more important to project managers than anyone ever thought,
- Revealing that the skills that brought project managers to where they are today are very likely NOT the skills they will require to move forward in their careers, and
- Demonstrating that leadership can be taught and must be learned.

Dr. Jerry Brightman

is the designer and facilitator of PMI-OC's Leadership Institute and president of The Leadership Group (TLG). TLG helps leaders and their teams understand and actualize those behaviors that will make them great. Dr. Brightman creates and delivers customized leadership programs.

In addition to program design and facilitation, Dr. Brightman does one-on-one coaching and mentoring, as well as speaking around the world about leadership development, team learning, change management, dialogue, systems thinking and organizational learning.

Since founding TLG in 1996, Dr. Brightman has worked with a number of prestigious global clients in Singapore, Italy, Russia, Colombia, Canada, the U.K., France, Costa Rica, Mexico, Argentina, Brazil, Venezuela, and throughout the U.S.

Dr. Brightman holds a Doctorate in Business degree from George Washington University, an MBA from American University, and a BA in Economics from Clark University.

The graduates of the 2007 PMI-OC Leadership Institute will be honored and will receive their diplomas at this special event. Don't miss it!

NEW MEMBERS

Mohammed Alam
Omar Amin
Bruce Boock
Otis Boyles
Roy Bradburn
Phillip Brutocao
Pat Castro
Jae Chang
Steven Christ
Frawn Granados
Bijan Hagh
Pei He
Laureen Heinz
Supriya Joshi
Peter Lin
Ronald Lowy
Martha Luce
Jeffery Lyons
Sumit Misra
Ken Pace
Tomydas Pallivathukal
Robert Pfister
Christopher Ross
Uppili Srinivasan
Bob Stuart
Michael Taylor
Laurence Wilson

NEW PMPS

Mitchell Bell
Michael Bremser
Randal Clark
David Huizar
Ying Ji
Ravi Myneni
Colby Riggs
Janelle Short
Annemarie Wheeler

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The Oldest Question. A New Answer.

Do you know what the oldest question in project management is? It's this: "What is more important in a project manager, project management expertise or industry expertise?" Over the past two years, I have posed this question to about 40 project managers from various industries and from all over the world. About a quarter said, "Project management expertise." About a quarter said, "Industry expertise," and about half think that you need a sound combination of both. Until the beginning of this year, I was with the last group, thinking that a combination of both was the Holy Grail. Now, in the tenth month of being the PMI-OC chair and having spoken to many of you during all of our events, I have changed my mind. Frankly, the two answers that are offered for the question are both wrong. The correct answer is this: the most important skill in a project manager is **leadership**. Let me explain.

In August of 2005, PMI-OC invited **Gregory Balestrero**, CEO of PMI®, to speak at our dinner meeting and to participate in an executive roundtable. We invited a good dozen executives from Orange County to attend this mid-day event. These executives gave us a clear signal. They said, that in their eyes, a project manager needs to be more than a subject matter expert or someone who can manage a project administratively. What they are looking for in project managers first and foremost are leadership skills.

It was at this meeting that our 2005 chair, **Kristine Hayes Munson**, **PMP**, decided that PMI-OC needed to add a new training focus to its agenda. In addition to PMP® workshops and advanced topics seminars, we also needed to focus on developing leadership skills in our chapter. That is why, in 2006, the board of directors approved the 2007 PMI-OC Leadership Institute. This year-long workshop is closely modeled after the original PMI Leadership Institute, but it is more than just a workshop. It is a one year journey that allows a group of about 20 of our members to explore what leadership means to them.

The PMI-OC Leadership Institute is facilitated by **Dr. Jerry Brightman**, who also designed and facilitated PMI's first four leadership institutes. I spoke to three of the participants and would like to relay what they had to say about the class.

Brent Felsted, **PMP**, decided to attend the workshop to continue building his leadership expertise on top of his PMP credential and technical management skills. His decision was also greatly influenced by **Adrienne Keane**, **PMP**, who called her own participation a "life changing event." In addition to making new friends, Brent feels he gained fresh insights into leadership because the facilitator brought him to a point where he began to place demands on himself to reach beyond his comfort zone.

Similarly, **Linda Keller**, **PMP**, joined the class to hone her leadership skills in the pursuit of becoming a PM leader and PM mentor. She said that she learned a great deal about herself. This is important, since she could become a better leader only by coming to know and being comfortable with herself. One of the primary benefits she gained was an improved set of skills to teach classes on leadership. She also enjoyed participating with the exceptional teams.

Finally, **Victoria Flanagan** joined the class as part of the board of directors leadership training. She found the biggest asset to be her fellow participants. Victoria reported that Dr. Brightman manages to lead the class in such a way that the greatest insights on leadership come from the others within the group.

The feedback of these three participants illustrates my point nicely. Next time you think about taking a class "just" for the PDUs, think about focusing on leadership instead. It is the next paradigm shift in project management.

Cornelius Fichtner, PMP, Chair/President

You do not lead by hitting people over the head; that's assault, not leadership.

Mentoring

At a recent board of directors meeting, we talked about the mentoring program that we have not yet achieved. The discussion was brief and pointed. The question was, "What are we doing to get a mentoring program in place?" It is a very good question. A mentoring program had been targeted for earlier this year.

Now the struggle begins. What exactly are we looking for in a mentoring program? How do we identify mentors? How do we identify people to mentor? What should we use as a baseline? How do we know if we are successful? These are all important questions and extremely difficult to answer.

At the recent PMI® Leadership Conference in Atlanta, one of the speakers asked, "With the graying of the senior PM workforce and the impending march of the baby boomers, what are we doing to enhance the top tier of project management?" The answer was education, specifically college education emphasizing project management. Good answer, but a solution that will take many years to make an impact.

Is mentorship the answer? We can all study and take the PMP® exam. Does that make us good project managers? Can a mentor be someone who assists with study groups? Can we learn more about our particular industries from industry-knowledgeable mentors? Are mentors the ones who have lived through the application of the PMBOK® framework and survived? What can we learn from them?

Perhaps the answer lies in each of these examples and more. But more importantly, if you are looking for a mentor for advice, coaching, and/or education, we should talk about your needs. If you are willing to serve as a mentor, let us know. We can match you up.

Watch for more information on our mentor program shortly. If you have ideas on how to make it successful, please send them to **membership@pmi-oc.org**. We would appreciate the feedback and the direction. Let the struggle begin.

Sylvan Finestone, PMP

Volunteer of the Month

Tariq Shaikh, PMP

The individual we recognize this month,**Tariq Shaikh**, **PMP**, can be described as a true international project manager.

Since April, Tariq has been the dinner meeting chair. He also coordinated logistics for the July career fair and serves on the website committee and as a PMP® prep instructor.

Diverse PM responsibilities have made Tariq a globe trotter: Europe, the Middle East, Canada, and 20 states in the U.S. with his supportive wife of 28 years. He has managed $1.9 billion power generation plant projects, as well as petrochemical, gas field development and telecommunications projects. Recently, he has taken on an assignment for managing large consumer electronics development programs.

Tariq gains a tremendous sense of achievement from bringing strangers together and developing them into a team. "The deadlines and challenges bring out the best (and the worst) in people…harnessing everything in a positive direction is an enjoyable experience, along with creating order out of chaos."

Through volunteering, Tariq has made new friends and grown professionally. He enjoys the friendly environment that PMI-OC offers, the helping and positive attitudes of the members, and the exciting and diverse activities.

Tariq summed up it up nicely by saying that he tries to do his share to make PMI-OC successful and enjoyable!

Ralph Dutra

Spark of Love

The malls, the traffic, the fight for the only available parking spot. You guessed it; It's holiday shopping time! While you're already battling the hoards of people for your own shopping, why not pick up something to bring a smile to a local child or teen?

Once again, PMI-OC has joined forces with the Orange County Fire Department in its annual **Spark of Love** holiday campaign. We are so blessed to live in beautiful Orange County, and it's easy to forget that there are many families who struggle during the holiday season. This is the perfect way to remind everyone that a small purchase can make a significant difference in someone else's life.

Bring an unwrapped toy or book to our December 11th dinner meeting, and you will not only gain major karma points (and who doesn't need good karma?), but you will also bring joy to a needy child.

At last year's dinner meeting we gave over 75 gifts to our local fire department. Let's beat last year's contributions!

Since we know our PMI-OC members are busy, hard working people, we're giving you full permission to sneak away and pick up something special for a little boy or girl. If you find yourself desperately avoiding the malls this season, we accept cash contributions too!

See December *Milestones* for more information.

If you would like to help, contact **Sabina Horigan**, PMI-OC Spark of Love coordinator.

Sabina Horigan
sabinaim@yahoo.com

Earn 14 P.D.U.s

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2008 PMI-OC BOARD OF DIRECTORS

Project manager for the 2008 PMI-OC Board of Directors election was **Deen Patel**, **PMP**.

Deen, along with **Judy Lovering**, **PMP**, and **Tushar Shah**, **PMP**, coordinated the anonymous, secure, non-competitive balloting, as well as presentation of the biographies, online voting via ESP Campus-Vote, and weekly status updates to the board.

The election was open to all who were PMI-OC members as of August 31, 2007. Online voting took place September 15-30, 2007. 263 responses were received, resulting in a 15 percent turnout for the membership. A majority of the votes cast was required for election to the 2008 board.

Thank you to the PMI-OC Elections Committee for its contributions, and congratulations to the 2008 PMI-OC Board of Directors. The newly elected board members, and the votes received by each, are shown below.

If you have any questions about the elections, please send your e-mails to operations@pmi-oc.org.

Nora Goto, PMP
PMI-OC Operations Director

Victoria Flanagan
Chair/President
231 votes

Victoria has been an active PMI-OC volunteer since joining in 2002. She was instrumental in developing the chapter's first strategic plan and has served on the board as marketing director, director at large, and chair-elect.

As chair, Victoria will focus on proactive chapter leadership succession, clear and attainable chapter goals and projects, and differentiated chapter value for the members.

Sylvan Finestone, PMP
Chair-Elect
228 votes

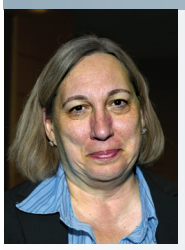
Sylvan joined PMI-OC in 2002. He served as the chapter's volunteer coordinator in 2006 and was the volunteer coordinator for the PMInAction conference in 2005.

As the chair-elect, Sylvan will support the chair as he prepares to assume the position in 2009. He plans to ensure that chapter goals are realized and to encourage project leaders to follow standard project management processes.

Kim Fields, PMP
Director at Large
240 votes

Kim has been an active PMI-OC member and volunteer since 2001. Past volunteer roles include the PMInAction team, career fair events, and dinner meeting chairmanship.

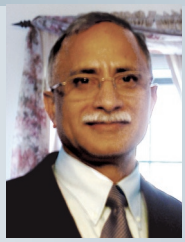
In her second term as director at large, Kim will continue to help achieve measurable project results that support strategic initiatives. She also plans to establish key performance indicators and metrics to assess the viability of the chapter's project portfolio.



Lora Lockwood, PMP
Finance Director
245 votes

Lora became a PMI® member in 1996 and joined the Orange County chapter in 2003. As a PMI-OC volunteer, Lora has served as editor of *Milestones* and was the chair of the jointly-sponsored 2006 SCCTC Conference.

In her second term as finance director, Lora will continue documenting procedures and plans to increase volunteers in the finance area, develop an improved strategic financial vision, and identify investment opportunities.



Tariq Shaikh, PMP
IT Director
239 votes

Tariq has been a PMI member for six years and a PMI-OC member for two. His volunteer activities include the Programs Committee, where he currently serves as the dinner meeting chair. Tariq is also an instructor for the PMP® prep courses.

As the IT director, Tariq's goals are to provide effective information technology leadership and to develop, improve, and align IT services to match PMI-OC's strategic and tactical goals.

Linda Keller, PMP
Marketing Director
246 votes

Linda joined PMI-OC in 2004. As a volunteer, she played a key role in the submission that resulted in three component awards for the chapter. She has also been an active volunteer on the Marketing Committee and an instructor for the PMP prep courses.

As the marketing director, Linda's goal is to create a positive, energetic perception of PMI-OC within both the project management community and the community at large.

Cornelius Fichtner, PMP
Membership Director
244 votes

Cornelius has been a member and active chapter volunteer since 2003. His efforts were recognized when he received the Volunteer of the Year Award for 2005. Since then, he has served on the board as programs director, chair-elect, and currently as chair.

As membership director, Cornelius wants to improve membership retention, strengthen the volunteer management process, and revitalize the ambassador program.

Nora Goto, PMP
Operations Director
241 votes

Nora joined PMI-OC in 2006. As a volunteer, she has served on the Membership Committee, working on membership statistics for the chapter's strategic planning process.

2008 will be Nora's second term as operations director. She plans to continue documenting chapter procedures to better support the board and chapter volunteers.

Renata Weir
Programs Director
231 votes

Renata joined the chapter in 2006. Her volunteer activities have included *Milestones* submissions, the SCCTC conference, and the PMI-OC registration desk.

As the programs director, Renata's goals are to ensure continuation and quality of existing programs (dinner meetings, advanced topics seminars, PMP prep courses, breakfast meetings, leadership training) and to identify new industry trends for future programs.

Test Your Knowledge on PMP Exam Questions

Here is a sample of some questions.

1. A document that provides detailed components contained within the work breakdown structure, including work packages, control accounts, a statement of work, the assigned responsible organization and schedule milestones is called:

   a. An organizational breakdown structure
   b. A WBS dictionary
   c. A scope baseline
   d. A scope management plan

2. Your company designs and builds patio covers for residential customers, involving unique design concepts and materials. Over the 20-odd years it has been in business, it has collected and compiled useful statistics with regard to the actual cost for each patio cover. As such, it has determined that the average labor and material cost per square meter is $25.00, which it applies to all cost proposals. What type of cost estimating technique is this?

   a. Analogous estimating
   b. Bottom-up estimating
   c. Fast-tracking estimating
   d. Parametric estimating

3. You work for an insurance company that uses expected monetary value to compute the premiums for various policies. One of your clients has $1,000,000 worth of equipment at a job site and wishes to minimize the risk of property damage by taking out an insurance policy. Using the following statistical data and assuming there is an additional policy-processing fee of $500, what is the premium charged to your client?

Type of Damage	Probability (%)	Amount of Loss (%)
Total	0.02	100
Medium	0.08	40
Low	0.10	20
No Damage	99.8	0

   a. $12,200
   b. $5,000
   c. $3,200
   d. $1,220

4. You are responsible for negotiating a complex contract with a selected seller. In addition to price, there are other issues for which agreements are needed, involving delivery dates of the various deliverables, reconciling special and general terms and conditions, progress payments, clarification of managerial and technical approaches the seller intends to use, nature and type of equipment furnished by your company, plus numerous other issues. You have developed an agenda and scheduled a negotiation session. Because of the complexity of the pending contract, the negotiation should be handled:

   a. As an independent process with inputs (agenda items) and outputs (documented decisions)
   b. By establishing a procurement management plan
   c. By developing a teaming agreement with the prospective seller
   d. By a neutral third party

Answers are on page 13.

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Julie Wilson

Awarded PMI Fellowship

The PMI® Fellow Award Member Advisory Group honored long-term member **Julie M. Wilson, PMP,** with the prestigious 2007 PMI Fellow Award. Julie was chosen based on her sustained and significant contributions to the Project Management Institute and association with the PMI-Orange County Chapter (PMI-OC) spanning over seventeen years. The award was presented at the PMI Global Congress awards ceremony in Atlanta on October 6, 2007.

Julie's contributions as a founding PMI-OC chapter member have created a strong, inclusive, collaborative, and professional project management community in Southern California. **Walter Bowman** agrees that Julie, "demonstrates sustained service to PMI and the profession resulting in outstanding professional achievements."

Julie played an instrumental role in founding PMI-OC. She used her organizational talents to help the team successfully charter the chapter in 1989. As **Barbara Wong** recalls, Julie's ideas were, "instrumental in the birth of leadership development . . . the institute is benefiting from all these initiatives today." **David Pells** adds, "Julie Wilson was an instrumental leader in three important developments: Specific Interest Groups, PM in Information Technology, and Women in Project Management . . . she profoundly changed the PM landscape."

PMI Fellow Julie M. Wilson, PMP, with PMI-OC Chair-Elect **Victoria Flanagan** and PMI-OC Operations Director **Nora Goto, PMP.**

Julie's long list of accomplishments and efforts includes serving on the PMI-OC Board of Directors from 1989 to 1993. While serving as president in 1991, Julie's contributions were vital in increasing the chapter's membership. Julie spearheaded the chapter's expansion into new program offerings, such as PMP® examination preparation, and also championed the building of relationships between PMI-OC and local educational institutions. Chapter members today continue to reap educational benefits because of these relationships.

Julie continues to serve as a role model and mentor for the PMI-OC leadership team. "She (Julie) encourages those she mentors to find their voices and to explore their leadership options," according to **Rebecca Winston**. Additionally, Julie introduced the concept of strategic vs. tactical thinking to the PMI-OC board and other key chapter volunteers at the 2002 annual chapter planning session. She participated in key chapter events, including the 15th Year Anniversary Celebration in 2004 and PMInAction, the chapter's inaugural professional development day, in 2005.

Today, Julie is as busy as ever with no end in sight. She plans to continue contributing to PMI strategic issues for the Orange County Chapter, IS SIG, and PMI Board of Directors. Julie is also involved with her local community, Irvine Valley College Foundation, the City of Laguna Woods, PMI-OC board as a PMI-OC Fellow, program board advisor and instructor for the chapter's UCI PM certificate program, and is working with the IS SIG board involving governance, marketing and new programs for its 14,000 plus membership in over 110 countries.

Julie's future plans include involvement with global humanitarian organizations focused on disaster planning, recovery, and rebuilding. Locally, she became involved with her community in assessing technology and infrastructure needs and is involved with the Laguna Woods City Council. Julie adds, "Newly retired from IBM, I have this long list of things . . . traveling for pleasure and working on my second book for my mother's family genealogy. I also enjoy playing *at* golf; however, I have a long way to go to become a competent golfer, as several PMI-OC members with whom I've played can validate."

What does it mean to be a PMI Fellow? According to Julie, "Being inducted as the 50th PMI Fellow, I am very honored to be a part of this august group, each member being honored and recognized for his or her strategic and sustained contributions in advancing the PMI organization and the PM profession globally."

PMI® Global Congress
NORTH AMERICA 2007

PMI-OC board members **Lora Lockwood, PMP**; **Kim Fields, PMP**; **Nora Goto, PMP**; **Sylvan Finestone, PMP**; and **Victoria Flanagan** at the PMI Global Congress in Atlanta.

Julie Wilson's leadership and vision have created the foundation of a vibrant project management community in Orange County. Each member of this community owes a debt of gratitude to Julie for the time and energy she invested as a chapter founder and continues to invest as a chapter member. Congratulations, Julie, on this well-deserved honor!

Author:
Bernice Valeriano

Contributor:
Kristine Hayes Munson, PMP

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> **Leading Virtual Teams –** *December 5, 11:30am-12:30pm*

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Some Critical Misconceptions

about RAD, Agile/XP and Other Forms of Iterative Development

Lois Zells began her presentation by taking an informal poll of the group with several questions about the use of iterative or evolutionary development in their respective organizations. Specifically, Lois wanted to know how many of those who use iterative or evolutionary development were able to do so successfully.

Lois said that approximately half of her annual revenue as a consultant comes from expert witness testimony in failed software project litigation. Surprisingly enough, in all of the years she has served as an expert witness in project litigation, only once was she able to represent the developers in a case. In the last ten years, with the exception of 2000 and 2001, every single litigation concerned developers who failed to deliver projects in an iterative or evolutionary environment.

She spoke briefly about the early pioneers who established the disciplines of software engineering. Lois explained that the disciplines evolved in a backward manner, starting with structured programming, followed by structured design, and then last, structured analysis. The highlight of structured analysis was user involvement and breaking down of activities into smaller pieces called "mini-specs."

Lois emphasized that projects involve a certain level of uncertainty because of their unique nature. Today's project managers can manage uncertainty by using the same PERT estimating techniques that were developed for the Polaris Project.

By placing one hand in front of her at waist level and the other above her head, Lois illustrated where many organizations are and where they need to be for successful agile development implementation. She showed that although organizations want to achieve higher levels of success (moving her hand above her head), many times they are not willing to do the necessary things at the lower level (moving her hand at waist level).

Lois talked about the four key elements of successful agile project development.

1. **People.** Success is dependent on STRONG management support (more than just talking the talk). A chief user and a chief advocate (a person with clout in the organization) are essential. Committed stakeholders are another important group of people needed for success. Users must be 100 percent committed to the project. Project teams that are self-directed/self-organizing need to work together in a collaborative style in the same work location. The optimal sizes of project teams are seven members, plus or minus two.
2. **Product Development.** Incremental Iterative Development (IID) is at the center of every agile development. Products need to be delivered quickly. User requirements are gathered in small low-tech specifications (breaking the problem down into small steps). Sustained user participation requires users to stay with the project to validate iterative demos. Many project managers are confused by the refinement of an iteration and what constitutes changes to scope. "If the required number of iterations increases due to additional knowledge gained, the size change does not mean change in scope."
3. **Project Management.** Project managers must have absolute authority to manage their projects, and projects must be delivered in one year or less. Planning needs to adapt to the situation. Jobs should be broken down into four to 16 hour segments, which can be completed by one person (inch-pebble level). Meetings must be face-to-face, occur at short intervals, and allow people to prepare. All team members must be present at all meetings, no excuses.
4. **Process "Awareness."** This requires frequent reflection and continuous improvement.

Approaches to iterative development:

- You must have good architects. Lois emphasized that success on an iterative development project will not be realized without accounting for the major interfaces.
- Deliverables need to be continuously reviewed, modified, and approved.
- Iterative development means iterative planning.
- Time-boxing that is date driven. Dates are then met by reducing scope, not by sacrificing quality.
- Agreement on completion criteria
- Firm plan on how groups will complete work
- Strong configuration management to manage change
- Be aware of the risks of iterative development.
  - Confusion can be caused by commingling business and technical requirements.
  - It is difficult to validate internal formulas and logic of business rules because users' vision can sometimes be clouded by the glamour of technology.
  - Scope is hard to control.
  - Inability to predict the number of iterations
  - Unrealistic schedules to complete
  - Schedule crunches may force poor design and an architecturally unsound system.
  - The "ilities" may become impacted: performability, reliability, maintainability, testability, usability, etc.

Continued on page 10

October Meeting Review

Continued from page 9

Lois emphasized the importance of not getting stuck in analysis paralysis. Most importantly, she stressed that the business requirements define the business problem and how it will be solved from the user's perspective. Lois explained that users and developers must work together to develop iterations until a final product is developed.

Lois summarized the meeting by recommending that the "full" iterative approach to development be used only when the project scope is small, the project is uncomplicated, all parties can accept the end dates, and all requirements and analyses are done up front.

If the "full" iterative approach is not possible, other methods, like the modified iterative approach, can be used (the iterative approach to obtain the requirements and the phased approach to develop everything else).

She challenged the dinner meeting attendees to review the iterative approaches presented and to determine if their organizations can do all that is needed to be successful at iterative development, or if they are willing to modify expectations for success.

Roger Lew, PMP

At the October Dinner Meeting

Clockwise from top:
Pia Nielsen-Wagner and **Susan Thompson** at the registration desk; **Beth Sargent**, **Marsha Jolliff,** and **Bill Brown**; **Amy Nowakaski** and **Joe Paradiso**; attendees networking at dinner

Left:
New PMPs, left to right: **Jennifer Murphy**, **Jessica Lee**, **Annemarie Wheeler**, **Marshall Gibson**, **Randal Clark**, **and Kathleen Dvorak**

Photo on pages 3 and 9 by **Steve Goto, PMP.** Photos on this page by **Simon Hawkins, PMP** (below).

The End of Fairy Tale Beginnings

ON OCTOBER 6, PMI-OC held another in its ongoing series of excellent advanced topics seminars. At this seminar, **Thomas Cutting**, **PMP**, presented a realistic view of what to expect at the beginning of a project. From the first slide of his presentation, the audience knew this was not going to be the run-of-the-mill talk about how projects get started. A castle, complete with turrets and flags, was the setting for some very unusual versions of characters we all meet on projects.

As it turns out, a fictitious company called "Extreme Insurance Overview" owned the castle. The audience was given an introduction to five characters who certainly would put an end to any ideas about sweet beginnings for a project; they were the **Wicked Step-Sponsor**, the **Troll Oversight Manager**, the **Bewitched Team Lead**, the **Technical Resource Ogre**, and some **Vanishing Users**.

Tom's unique presentation, complete with a spiral bound booklet of the slides, came with solutions to each of the "wonderful" characters. The presentation included mini-videos of actual encounters between the characters and Tom (who played the knight with vanquishing sword). The idea behind the company was unusual, but was supported by a reasonable business plan, at least for the presentation.

When dealing with the Wicked Step-Sponsor, Tom suggested that you should think like your sponsor, concentrate on communicating project benefits, and create and articulate project goals. Each of these responses was discussed in detail, and the audience was kept involved by exercises and questions.

The Troll Oversight Manager who pilfers money from your project and redirects resources to other efforts needed a somewhat different tact. For him, you need to determine why he needs control, insure that he has a good basis of estimate, and accurately track the progress of the project schedule with him. A practical partner should assist the Bewitched Team Lead and have his projects prioritized correctly. The Technical Resource Ogre handling was interesting because it dealt with the possible feelings motivating the individual. Vanishing Users need to be kept involved. Tom listed multiple ways to keep them involved, including effective kickoff meetings (with food), correctly setting their expectations, and keeping them informed.

And with the help of the gallant knight, "they all lived happily ever after … "

Thanks to Thomas Cutting, PMP, for an excellent presentation with lots of information for all of us to remember and use.

John Sunderson, PMP

Photos by George Meier, PMP and Shirley Goodwin, PMP (from 2006 SCCTC)

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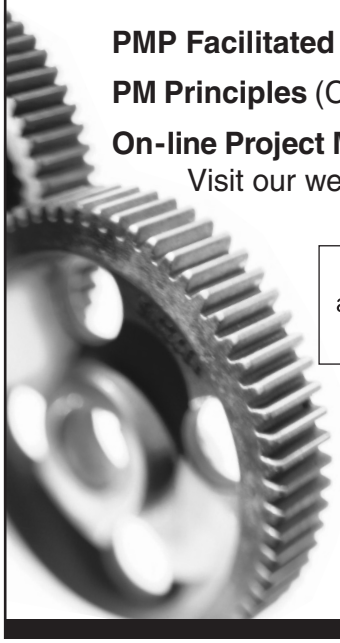

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YOUR BEST CHANCE TO PASS THE PMP EXAM

Wednesday, November 7

Member/Volunteer Orientation Training

Welcome

to Project Management Institute-Orange County Chapter, Inc.

You have taken the first step toward managing your professional career net-work 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:
Wednesday, November 7, 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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Answers to PMP Exam Questions

From page 6

1. b. A WBS dictionary

PMBOK® 2004, paragraph 5.3.3.3, page 117 [Planning]

2. d. Parametric estimating

PMBOK® 2004, paragraph 7.1.2.4, page 165 [Planning]

3. a. $12,200

Expected monetary value (EMV) is calculated by multiplying the value of each possible outcome by the probability of its occurrence, and adding them together.

Total loss:
0.0002 X $1,000,000 = $200

Medium loss:
0.0008 X 0.4 X $1,000,000 = $320

Low loss: 0
0.001 X 0.2 X $1,000,000 = $200
Policy-processing fee: $500

Premium:
$200 + $320 + $200 + $500 = $1,220

PMBOK® 2004, paragraph 11.4.2.2 page 255 [Planning]

4. a. As an independent process with inputs (agenda items) and outputs (documented decisions)

PMBOK® 2004, paragraph 12.4.2.4, page 288 [Executing]

New CAPM **Chad Curtis** with Mr. CAP "M," **Frank Reynolds**, **PMP**, at the October dinner meeting

Coming Events

Nov. 3 Advanced Topic Seminar

Marty Wartenberg
Treating Innovation as a Project
See column at right.

November 7

Member/Volunteer Orientation Training
See page 13.

November 8

Breakfast With Your SOX On
See page 16.

November 9 SoCal Pharma LIG

Breakfast Meeting, Orange
See www.pharmalig.org for details

November 13 Dinner Meeting

Dr. Jerry Brightman: Seeing the Future of Leadership in the Present: Implications for Project Managers

2007 PMI-OC Leadership Institute Graduation
See page 1.

Dec. 1 Advanced Topic Seminar

Mike Graupner, PMP
Gene Senecal, PMP
Advanced MS Project: Hands-On Training **Part 2**
See column at right.
Limited to first 40 registrations. No walk-ins.

December 11 Dinner Meeting

Jim Zack, PMP
Electronic Project Documentation

Spark of Love Toy Drive
PMI-OC Fellowship Awards

January 5, 2008 Advanced Topic

Janet Burns
Topic TBA

January 8, 2008 Dinner Meeting

Frank Reynolds, PMP
What Happens When We're All PMPs?

February 2, 2008 Advanced Topic

Kristine Hayes Munson, PMP
The Sixth Time's a Charm: A Long-Term Approach for Implementing a Successful Organizational Change

February 8, 2008 Special Event

PMI-OC Leadership Institute 2008
Facilitated by Dr. Jerry Brightman
See page 15.

Feb. 12, 2008 Dinner Meeting

Frank Addeman, Walt Disney Imagineering

Note: Coming events may be subject to change.

Advanced Topic Seminars

Saturday, November 3, 2007

Treating Innovation as a Project

Presented by Martin Wartenberg, PMI-OC Fellow

Bringing innovation into your organization may be one of the most difficult projects that you will ever be asked to manage. It is more like a journey without a road map or GPS assistance than a standard project with well defined outcomes and many successful models to follow.

This seminar will explore the barriers and difficulties you may encounter when establishing innovation as a project in your organization. Defining project critera, gaining senior management support, overcoming lack of established benchmarks and milestones, and dispelling beliefs that "one size fits all" and that the innovation is just a "fad" are only a few of the challenges you could face.

This seminar will introduce methods to deal with and overcome these challenges, such as creativity and innovation, documentation of existing and proven models, team selection, and case studies.

Martin (Marty) Wartenberg is Chief Inventor for Zero Boundary Corporation in Carlsbad, California, where he is responsible for development of new project management and leadership training products. Marty has led multi-site software and system projects and has established offshore design centers in various locations. He has also taught project management courses at several University of California campuses and around the world. He is currently the director for several science and engineering leadership programs at UCI. In 2005, Marty was named a PMI-OC Fellow, the chapter's highest honor.

Saturday, December 1, 2007

Advanced MS Project: Hands-On Training

PART 2

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

This seminar teaches you more advanced topics in MS Project, specifically, taking the output from MS Project and creating tools to show if the project is on track, behind schedule, obtaining EVA from MPP, and reporting to the upper echelons. Dos and don'ts and using Microsoft Office as the reporting software.

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.

Where:	**Keller Graduate School of Management** 880 Kilroy Airport Way, Room 227, Long Beach, CA 90806
PDUs:	There are four PDUs for this event.
When:	First Saturday of every month, 8:00 a.m. to 12:00 p.m.
Cost:	In advance: $45 members, $50 non-members At the door: $60 for both members and non-members
Information:	www.pmi-oc.org

PMI-OC Leadership Institute 2008

BEGINNING FEBRUARY 8

Save the Dates

The Project Management Institute-Orange County Chapter and The Leadership Group are proud to announce the second annual PMI-OC Leadership Institute.

The PMI-OC Leadership Institute is a year-long advanced leadership training program offered to PMI-OC members and non-members to enable them to become more competitive in a global environment.

The program is designed to build core leadership depth and will provide valuable leadership feedback from an objective 360-degree basis. Participants will develop the comprehensive coaching and feedback skills needed by future global leaders.

The PMI-OC Leadership Institute will reflect leadership development programs offered by Fortune 500 companies, including personal leadership assessment, skills building, peer networking, discussion and mentoring.

Program Structure

February 8-9, 2008, Session One — 16 PDUs

Foundations: Leadership Can be Taught and Can be Learned!
An introduction to many leadership aspects, including understanding of self, knowing personal and organizational values, creating a shared vision, developing successful strategies, and systems thinking.

360-degree Assessment Debrief — 1 PDU

One-on-One Debrief
Participants complete a SKILLSCOPE® 360-degree assessment instrument. Results will be discussed in individually scheduled hour-long coaching sessions with our facilitator, **Dr. Jerry Brightman.**

May 16-17, 2008, Session Two — 16 PDUs

Discovering the Leader Within
Participants will begin to build effective and meaningful leadership development plans based on 360-degree instrument results, in addition to delving deeper into different leadership aspects.

October 3-4, 2008, Session Three — 16 PDUs

Towards Leadership Wisdom
Participants now become involved in action learning. They will be able to apply newly discovered skills acquired and learned throughout the program.

November 11, 2008, Leadership Success — 1 PDU

Leadership Success. Participants will be recognized for their successful completion of the program at the November 11. 2008 PMI-OC dinner meeting. The keynote speech will be delivered by a recognized leadership speaker.

Our Facilitator

Dr. Jerry Brightman, designer and facilitator of PMI's first four Leadership Institutes, is president of The Leadership Group (TLG). TLG helps leaders and their teams understand and actualize those behaviors that will make them great. Dr. Brightman creates and delivers customized leader development programs.

In addition to program design and facilitation, Dr. Brightman does one-on-one coaching and mentoring, as well as presenting a number of speeches around the world related to leadership development, team learning, change management, dialogue, systems thinking and organizational learning.

Since founding TLG in 1996, Dr. Brightman has worked with a number of prestigious global clients in Singapore, Italy, Russia, Colombia, Canada, the U.K., France, Costa Rica, Mexico, Argentina, Brazil, Venezuela, and throughout the United States.

Dr. Brightman holds a Doctorate in Business degree from George Washington University, an MBA from American University, and a BA in Economics from Clark University.

We are honored to welcome Dr. Jerry Brightman as facilitator of PMI-OC's second annual Leadership Institute.

Only $50.00 per PDU For Members

Total PDUs: 50

Program will be limited to 25 participants.

Total cost:	**PMI-OC members:**	**$2,500**
	Non-members:	**$2,900**

PAYMENT OPTIONS. Three separate payments or one large payment.

Three payments: Your credit card will be charged for the first payment only. When registration opens, the same card will be charged for the additional fees.

Payment breakdown: Members: Session One and 360 Review, $1,200; Session Two, $650; Session Three $650.

Non-members: Session One and 360 Review, $1,400; Session Two, $750; Session Three, $750.

Watch www.pmi-oc.org for upcoming registration information

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PMI-OC Dinner Meeting

Tuesday, November 13, 2007

Program **Seeing the Future of Leadership in the Present: Implications for Project Managers** and **2007 PMI-OC Leadership Institute Graduation**
Dr. Jerry Brightman

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:		*At the Door:*	
Members	$30.00	Members	$40.00
Non-Members	$35.00	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, November 11, for 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, November 11, or anyone who makes a reservation and does not attend, will not receive any refunds.

Breakfast with Your SOX On

Thursday, November 8, 2007:

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

Second Thursday of every month
Registration: **kevinmerr@earthlink.net**
Full breakfast buffet iis self paid.
Parking is validated.

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