PMI® MILESTONES
ORANGE COUNTY CHAPTER

NOVEMBER 2008 • Volume 20 • Number 11

2008 CHAPTER BOARD

Victoria Flanagan
Chair/President
949-888-2839
chair@pmi-oc.org

Sylvan Finestone, PMP
Chair-Elect
714-612-1550
chairelect@pmi-oc.org

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

Stephen June, PMP
Finance Director/Treasurer
714-454-7168
finance@pmi-oc.org

Tariq Shaikh, PMP
IT Director
949-302-4494
it@pmi-oc.org

Linda M. Keller, PMP
Marketing Director
714-389-0052
marketing@pmi-oc.org

Thomas Cutting, PMP
Membership Director
714-262-2303
membership@pmi-oc.org

Nora Goto, PMP
Operations Director/Secretary
714-322-3299
operations@pmi-oc.org

Mike Graupner, PMP
Programs Director
714-349-8170
programs@pmi-oc.org

Volunteer Opportunities
Volunteer@pmi-oc.org

Advertising Opportunities
Advertising@pmi-oc.org

November 11
Dinner Meeting

Speaker:
Tim Covington

Tim works for The Boeing Company as Engineering Functional Manager for the Southern California Region Engineering Multi-Skill Leadership (EMSL) organization. In this capacity, he is responsible for project management processes, tools, and training throughout the Southern California region. He is also the project engineering focal support to Space and Intelligence Systems (S&IS) for the El Segundo and Seal Beach sites.

Tim Covington has over 20 years of aerospace experience with The Boeing Company in Southern California, is PMP certified, and is a member of PMI-OC. He holds a Master's of Science degree in project management from The George Washington University, and is a project management instructor at the UCI Irvine extension program.

Developing Project Managers Who Achieve SUSTAINED PROJECT SUCCESS

To stay competitive in today's marketplace, companies must flawlessly execute commitments made to their customers. Those commitments are delivered every day, at every level of the organization, through the planning and execution of projects. Because so much is at stake, it is imperative that companies strive for sustained project success. Sustained project success can be achieved through the understanding of projects and project management in an organizational context, and the continuous development of project managers (PMs). The key to developing PMs is to focus on the competencies that result in project success.

While there has been extensive research related to project management in recent years, one topic that continues to resonate is PM competency. At the center of the discussion are the questions, "What exactly constitutes PM competency, and what attributes do the most effective PMs possess?" Competence is defined as "having requisite or adequate ability or qualities." Attribute is defined as "a quality or characteristic inherent in or ascribed to someone or something" (*Merriam-Webster.com*). Thereby, it can be stated that, "Attributes are the unique abilities and qualities that result in competence." The challenge, then, for any organization is correlating attributes to competencies, and once established, using this knowledge to develop PMs.

The graduates of the 2008 PMI-OC Leadership Institute will be honored and will receive their diplomas at the November dinner meeting.

NEW MEMBERS

Mary Arakawa
Phen Cheng
Thomas Ciriacks
Denise Dien
James Gulak
Sameer Gurav
Ryan Hart
Richard Kanter
Margaret Lebrecht
Jose Martinez
Janet Michener Whipple
Gopalakrishnan Murugesan
George Papich
Jan Pfeil
Joseph Rutherford
Candice Sale-Rodriguez
Fnu Shay
Mariella Sher
Prem Singh
Michael Smith
Micah Snider
D'Shone Swiney
Florin Tiru
Ishtaio Vali
Rose Williams
Carletta Woods
Erik York

NEW PMPs

Max Ballarte
Shannon Gasparac
Gopalakrishnan Murugesan
Anand Raghavendran
Linda Lee Sorgel
Jeffrey Werkmeister

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THE CHAIR'S COLUMN

2008 State of the Chapter

We held our Annual Business Meeting during our October 14 Dinner Meeting, as has been our chapter custom. The purpose is to communicate the state of our chapter (where the chapter is with respect to the annual plan and our financials), as well as to announce our incoming Board of Directors.

The key messages that I delivered were that our chapter continues to be a healthy business and that we have accomplished a lot so far this year towards our 2009 Vision and our 2008 Annual Plan. Due to the importance, in this article, I will expand on these messages and on our chapter investments that helped make some of our accomplishments possible. Refer to an accompanying article in this issue for more details.

A fundamental step in determining the health of a company is the analysis of a company's historical financial statements. Though PMI-OC is not profit driven, we need to generate enough money to achieve our goal of providing quality and relevant offerings to our members. This requires that we run our chapter like a business, including ensuring we invest chapter funds wisely and retaining adequate financial reserves. PMI-OC reserves continued to grow this year, and we have been operating in the black. This is very important news, especially given the current economy. As a result of our proactive financial management earlier this year, we changed some of our bank account investments which mitigated some of the impact of market downturn.

This year's Board made some important and tough decisions that were critical in helping our chapter retain its health. One decision in particular (announced in our May Milestones issue) was to deliver our Milestones newsletter in digital format only. By making July our last postal mailed issue, we were able to free over $15,000 this year and $40,000 next year to invest in other member offerings and services. This change helped fund some key other efforts and accomplishments this year.

We purposely focused efforts this year on improving our infrastructure which did require some financial investment in technology, tools, and services. One key and visible achievement was our new website with event registration system which was made possible by a dedicated team of volunteers and our investment. This new website is a vital delivery mechanism for current and future chapter offerings and member-specific value – even more so given our local commuting challenges, the fact that we are all extremely busy these days, and with the current economy. We also invested in enhanced and new tools for our volunteers and in a 90-day trial initiative to outsource a subset of our weekly and monthly bookkeeping functions. These infrastructure investments have all helped improve our operating effectiveness and are considered well-worth the money.

To help demonstrate our commitment to our members and providing value, the Board made another chapter investment early this year to subsidize the Dinner Meeting costs. This decision enabled us to keep registration fees at their current pricing this year and enabled attendees to have free parking. Similarly, to help support our members and community during an already slowed economy this year, we extended early registration deadlines (retaining lower price tiers longer) and offered payment options for special events.

We plan to continue to be conscious of our member needs and the market in making future chapter decisions and to be innovative in delivering offerings and operating the chapter in order to provide increased member value. The State of the Chapter presentation will be posted online at www.pmi-oc.org.

Election Results – 2009 Board of Directors!

Hopefully, you already have heard the results of our Annual Elections which we held in September via online voting. Refer to the article in this issue summarizing the election results. I want to recognize our Nominating Committee for their efforts – Glen Fujimoto, PMP; Kristine Munson, PMP; and Adrienne Keane, PMP. Join me in congratulating our elected 2009 Board of Directors!

Victoria Flanagan
Chair/President

Volunteer of the Month

Craig Wilson, PMP

The SoTeC Conference (formerly SCTCC) is an annual event held in conjunction with several technical, educational,and professional organizations. The conference features a wide array of presenters who discuss IT related topics and issues.

This year **Craig Wilson, PMP** was asked to represent PMI-OC at the 2008 conference. Craig acted as liaison between the chapter and the SoTeC board, communicating information bi-directionally to allow for prompt and focused responses from both entities.*

In this role, Craig took the lead and was exceptionally effective in the areas of finance and marketing, coordinating participation at the registration desk, and use of the chapter credit card machine, as well as submitting a timely payment of the chapter's up-front contribution.

In the area of marketing, Craig made timely efforts to maximize the payback expected from the chapter's investment through brief, but frequent, e-mails to a targeted audience.* For this reason, PMI-OC is proud to recognize Craig Wilson as its Volunteer of the Month for November 2008.

Craig is a seasoned project management professional and has been a PMI-OC member since October 2001. During this time, he has shared his expertise as a volunteer and leader within the chapter, acted as a PMP® preparatory course instructor, SoTeC (SCTCC) marketing chair in 2007 and 2008, and currently represents the chapter as a liaison to related professional organizations in the Orange County area.

In his professional practice, Craig works in the arena of large scale IT project management, project recovery, and PM and PMO coaching in addition to consulting in other functional IT areas. Craig feels that the time he has dedicated to working as a volunteer for PMI-OC has been rewarding in many ways, but particularly in the friendships and professional relations he has developed over the years. In his words, "As a consultant, I move from client to client, but PMI-OC is always home."

Beth Williams, PMP
Volunteer Coordinator

** Sylvan Finestone, 2008*

Photo by **Greg Savage, PMP**

Volunteers are worth their weight in GOLD

PMI-OC would like to express its gratitude to those who volunteered in 2008. At the November and December PMI-OC dinner meetings, individuals who volunteered time with the chapter will be recognized with a small token of thanks!

Please stop by to pick up your gift in the lobby! If you have any questions regarding your eligibility for the gift, please contact volunteers@pmi-oc.org.

We value the unique talents and contributions of our volunteers!

Volunteer Opportunities

Information Technology: it@pmi-oc.org

Webmaster

Responsible for web page design, including graphics, animation, and functionality. Provide infrastructure support and advise IT director on improvement, results, competition, and new technology to assist with brand marketing. Identify and manage new online revenue generating marketing opportunities. Act as technical contact point for Affiniscape and other service providers, as well as PMI® website governors/change management for all technical issues.

Proven website management experience required. Excellent communication skills and strong web design skills, including HTML and JavaScript editing. Thorough knowledge of search engine optimization techniques. Experience in running and evaluating online marketing campaigns, including management of pay-per-click advertising.

IT Volunteer

Support webmaster on design, style consistency, and content management concepts. Advise IT director on website issues and improvements; coordinate with Affiniscape; manage e-mail setups and address books for the chapter.

Marketing Director: marketing@pmi-oc.org

Advertising Project Director

We need someone to solicit advertising for our monthly newsletter, *Milestones*. This volunteer will manage the ads, see that payments are made and/or reciprocal agreements and contracts are up to date. Contact companies to encourage sponsorships, vendor opportunities, and website advertising. Sales experience would be helpful.

Marketing Website Page Design

Need a volunteer with experience in website page layout, using an existing website style guide. Dreamweaver and/or HTML knowledge and experience required. Photoshop, or other photo editing software skills are also required. A third party content management system (CMS) will be used to lay out the pages. CMS training will be provided by the IT team.

Continued on page 4

Volunteer Opportunities

Continued from page 3

Marketing Director: marketing@pmi-oc.org

Website Content Editors

Several volunteers are needed to help review the content of our website. This website editor will look over all the pages of the website for spelling and grammatical errors and report them to the webmaster. Time commitment should amount to a couple of hours a week.

Project of the Year Project Manager

The Project of the Year (POY) is a highly visible, prestigious award presented by PMI® Global. PMI-OC selects an outstanding project to receive the chapter level award (PMI-OC POY), which is entered into the PMI Global competition. Need a project manager to run this program and set up a team to contact potential candidates.

Membership: membership@pmi-oc.org

Spark of Love Committee Members

Be a part of PMI-OC tradition! The membership committee coordinates the Spark of Love Toy Drive. PMI-OC's annual event in December. Help put a smile on a child's face!

Operations Director: operations@pmi-oc.org

Operations Knowledge Managers

Needed to create and organize the process and policy documents for the chapter. This person will assist the operations deputy in setting up access to documents, as well as setting up committee access to the knowledge library. This job can be managed remotely. Time commitment for this opportunity is roughly ten hours per month initially, with possible teleconference participation every other month

Operations Deputy

An operations deputy is needed to support the operations director in preparing for board meetings (preparing agenda, minutes, auditing, updating and e-storage of documents). This person should be available to attend board meetings (held the fourth Tuesday of every month). This is a fun way to learn more about the inter-workings of the chapter and would be a good jump start into a leadership position with the organization.

2008 State of the Chapter

Another year is coming to an end, and the PMI-OC Board of Directors is once again planning for the upcoming year. During the October dinner meeting, **Victoria Flanagan** updated the chapter on the 2009 Strategic Vision. As part of a three-year vision, PMI-OC is in the second year of planning and began with the following purpose statement:

Providing members quality professional development and networking opportunities.

The 2009 Vision defines what the chapter will look like by the end of 2009. The vision is to build a stronger community: develop a stronger connection with our members, continue to deliver high-quality offerings, enable a decentralized and changing environment, and progress our chapter maturity. As the picture below shows, the vision's four key components are member value, members, offerings, and infrastructure.

As Victoria explained, two strategic objectives are needed to achieve the 2009 Vision:

1. **Differentiated Membership Value:** Member-specific benefits and upgrades to the chapter website (such as the "members only" area).
2. **Operational Effectiveness:** Franchise key business processes, develop/empower operational leaders, enable internal collaboration, enable strategic and operational balance.

The key is not to dampen the energetic culture of PMI-OC and to continue to bring value to the membership. Currently, the average membership is three years, which results from members moving, changing jobs and careers, or other life changes. With the slowed economy, PMI® growth has slowed overall with most growth occurring overseas and among smaller chapters. With an average growth rate of three percent among the 17 chapters in the western states, PMI-OC has been steady at a growth rate of two percent. Statistics as of September 30, 2008 indicated that PMI-OC membership includes 993 credentialed PMPs. Perhaps by the end of October, our chapter can announce a milestone of 1,000 PMPs.

The PMI-OC team is proud to report several accomplishments in support of the offering and infrastructure vision. PMI-OCI's marketing team streamlined several of their processes and has become an even more organized, effective, and efficient team. Additionally, the decision was made to move the *Milestones* hard copy newsletter to a PDF download format on the website, where members may read their copy directly from their computers This helps the chapter reduce printing expenses, thus allowing for more member offerings. Additional offering highlights include:

- Launching a new www.pmi-oc.org: event registration, content, site "look and feel"
- Special programs: career fair, PMI-OC LI, SoTeC
- Introducing the President's Award
- Expanding the ambassador program
- Updating branding and marketing collateral
- Revitalizing corporate outreach
- Creating new business relationships
- Launching online logowear sales: Land's End site

The infrastructure vision's objective of delivering effectiveness was accomplished by:

- Launching the new www.pmi-oc.org: event registration, webmaster, content managers, configuration management
- Launching virtual meeting tools
- Expanding the knowledge repository
- Volunteer role improvements
- Volunteer succession
- Improved and new policies, procedures
- Cost savings measures for reinvestment in member offerings
- Negotiation of contract and venue benefits

In summary, the chapter is doing well, with 2008 financials indicating a positive financial outlook, great participation and hard-working volunteers. As a reminder, feedback on what the chapter is doing well and areas for improvement are always appreciated. PMI-OC looks forward to your continued participation and support in 2009 and beyond!

Bernice Maldonado

2009 PMI-OC BOARD OF DIRECTORS

Sylvan Finestone, PMP
Chair/President

Sylvan has been a chapter member since 2003. He has held various volunteer leadership positions, and has served on the board as membership director and chair-elect.

Sylvan currently works as a senior principal portfolio manager at CSC, specifically in the aerospace and defense divisions at Raytheon.

In 2008, as chair-elect, Sylvan supported finance with process, procedures, and invoicing and IT with the website development, for which he received the President's Award. As chair/president, Sylvan looks forward to realizing the objectives of the chapter's 2009 strategic vision.

Stephen June, PMP
Chair-Elect

Stephen has been a PMI-OC member for ten years and has over 25 years of experience as a project manager and analyst in IT and finance. Stephen currently works as an analyst for DirectTV.

Stephen has volunteered extensively for the chapter in various capacities and has served on the PMI-OC board as the vice president of finance, vice president of professional development, and IT director. Stephen currently serves as the finance director.

As the chair-elect, Stephen envisions the board refocusing its activities around the membership, ensuring that direct benefits to the members are incorporated into board decisions.

Cornelius Fichtner, PMP
Director at Large

Cornelius has been a member of PMI-OC since 2003 and has 17 years of experience in managing projects in the U.S., as well as in Switzerland and Germany. He currently works as a PMO consultant and PMP® trainer and is the founder and host of *The Project Management Podcast* and *The Project Management PrepCast.*

Cornelius has been a chapter volunteer in a number of roles and a PMI-OC board member as programs director, chair-elect, and, most recently, chair/president.

As the director at large, Cornelius plans to bring a long term vision of a strategic board to the organization.

Francisco Avalos
Finance Director

Francisco joined PMI-OC this year and has nearly 20 years of experience in the information technology and financial industries. He currently works as a project manager for Freedom Interactive.

Francisco has been a volunteer on the chapter's finance committee, working with our current finance director and learning various roles within the finance group. Francisco also has extensive volunteer experience with other non-profit organizations.

Francisco's goals for PMI-OC include financial compliance, financial process improvements, and utilizing the best tools for streamlined and accurate accounting.

Tariq Shaikh, PMP
IT Director

Tariq has been a PMI-OC member since 2005. He has over 25 years of experience in international technical project management and currently works as a program manager for Belkin International.

Tariq is the 2008 IT director and played an instrumental role on one of big projects that the chapter undertook this year: the new website. Tariq received the PMI-OC President's Award, recognizing the core website implementation team.

Tariq's goals as 2009 IT director are (1) complete the next phase of the PMI-OC website, and (2) train and mentor a least one team member to become IT director in 2010.

Lori Shapiro, PMP
Marketing Director

Lori has been a PMI-OC member since 2005 and has over 25 years of experience working in and around technology. She currently works as a senior project manager for Applied Computer Solutions.

Lori has been an active chapter volunteer, recently as a key member of the core website implementation team. She was named Volunteer of the Month for April and received he President's Award for her efforts.

As marketing director, Lori plans to expand the chapter's visibility, and to support chapter programs. She will actively work with IT to ensure that the chapter website remains a valuable member beneift and effective marketing tool.

Thomas Cutting, PMP
Membership Director

Thomas has been a PMI-OC member for the last four years. He has over 15 years of IT experience in the health care, entertainment, insurance, automotive, financial, and retail industries. He currently works as a project manager for Mercury Insurance Group.

Thomas has volunteered as a member of the marketing team and currently serves on the PMI-OC board as the membership director.

Thomas' goals as membership director in 2009 include improved membership retention and increased membership from targeted sources, such as chapter sponsors.

Bruce White, PMP
Operations Director

Bruce joined PMI-OC this year. He comes to us from Texas, where he was a member of the Houston chapter. He has over 21 years of experience planning, designing, and managing records and information programs and is a Certified Records Manager (CRM), as well as a PMP. He currently works as the director of records management for Apria Healthcare Corporation.

Bruce has worked with the current operations director in establishing a records management program and a knowledge transfer process.

Bruce plans to continue the work being done in the operations group, leveraging his professional experience in records management.

Derek Barraza, PMP
Programs Director

Derek has been a PMI-OC member since 2005 and has over 27 years of experience in various aspects of IT. He currently works as a client manager for Compuware Corporation.

Derek has served as our speaker's chair since the end of 2007 and was very involved in our recent and successful career fair. Derek was named Volunteer of the Month in recognition of his contributions to the chapter.

Derek's goals as membership director include Increased attendance at PMI-OC programs and special events, proactive marketing of programs and events, chapter sponsor recruitment, and strengthened relationships between the board, the membership, and the business community.

Earn 14 P.D.U.s

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CIO Forum
Globalization and Offshoring

Our October dinner meeting was an exciting panel discussion titled "CIO Forum: Globalization and Offshoring." **Derek Barraza, PMP**, chair of PMI-OC's speaker committee, moderated the three-person panel. The panelists described their first-hand knowledge of globalization and outsourcing and gave the audience practical advice on offshoring in the information technology industry. The discussion focused on several points:

- The economic forces shaping globalization today and in the future
- The risks and exposure related to offshoring
- When does offshoring make sense?
- Managing offshore projects: strategies for managing challenges of distance, time, and cultural differences
- Contractual challenges
- The future of IT jobs in the U.S.
- Lessons learned

Danis Yadegar (above right), founder, president, and CEO of Arsin Corporation, opened the panel discussion with an overview of globalization and offshoring, forming a solid framework for the topic.

Mr. Yadegar defined a few common terms, including globalization, outshore, offshore, nearshore, and inshore to give the audience a common understanding. He also presented a broad overview of information technology globalization trends in terms of three waves of global business practices. He cited the growth in worldwide globalization of offshoring by Gartner and Forrester. He also discussed the highlights of a ten year study by the Bureau of Labor Statistics related to offshoring and future trends in the area.

Dena Gebrowsky (above center), Vice President of Customer Care at Compuware Corporation, was the next panelist. Ms. Gebrowsky works with many of Compuware's customers who are involved in different levels of outsourcing and offshoring. She expressed some areas of concern, including "buyer's remorse," when a company becomes involved in outsourcing.

She opened with reasons why most companies outsource.

- Overall staff cost reduction,
- Ability to expand staff to improve the time to market,
- Offsetting a declining number of skilled staff because of retirement, and
- Budget improvement.

Ms Gebrowsky explained the few major issues in outsourcing that create the most "remorse." When considering outsourcing, the company needs to know what they are handing over for outsourcing, and possess an ability to measure the "success" of what they outsource. A third consideration that is often missing is a clear exit strategy.

The final panelist was **Douglas Beebe** (left), a corporate manager in business support systems for Toyota Motor Sales (TMS), U.S.A., Inc. Mr. Beebe opened his comments with the statement that information technology of the future must provide strategic value for the corporation. This strategy includes moving the information technology staff up the value chain. When they are positioned throughout the organization, IT staff can assist in driving critical organizational change. Mr. Beebe described problems he encountered in past Toyota work groups, including working in silos and creating many unnecessary process layers. He is convinced that by moving the informational technology staff into other areas of the corporation, the organizational processes have been greatly improved.

Mr. Beebe is in favor of outsourcing since it allows Toyota to free up staff time to work on more strategic initiatives and to increase the skills of the Toyota staff. Globalization means "anytime-anywhere," whether it is applications, or corporate processes, or building transferable skill sets across the globe.

The panelists' opening comments formed an excellent base for a lively question and answer session to further explore the advantages, disadvantages, rewards, and challenges of global outsourcing:

Question: In the standard business literature, it is assumed that co-location of staff is more nimble and effective. How does this impact outsourcing?

Answer: You must ensure that the work performed offsite is work that is thoroughly defined, with a sound contract and established relationships. Also, you must document how an outsourced component of a system or application relates to other operational systems in the corporation. You need to make sure the outsourced system or application can be thoroughly measured to truly identify the success or failure of the effort.

Question: What type of quality metrics are you gathering on these projects?

Answer: Although most companies outsource services to reduce costs, they sometimes do not save money when the quality of what they get back does not meet expectations. For example, it might

Continued on page 8

October Meeting Review

Continued from page 7

take more resources to maintain the end result of an outsourced service or even, at times, the outsourced result might have to be totally reworked. You must look at the specifics of the contract and establish baseline quality metrics and measure the finished product against the baseline.

Question: Is there really a bottom line cost savings with offshoring, or is it just an ongoing misperception of a real cost savings?

Answer: You need to evaluate the current investments you have already made, and look at the business goals you are trying to achieve. Then, determine how those goals can be achieved using the existing information technology systems and investments. Many times, inefficiencies exist in the in-house information technology processes. If these can be improved, they can have a significant impact on the successful improvement of the company, and outsourcing will no longer be needed.

Question: How does the current downward financial climate impact your decisions regarding future outsourcing?

Answer: Generally, it does not change the outsourcing decisions. This climate will force more efficiencies and effectiveness. Not only will this force companies to continue outsourcing, there will also be a renewed interest in the automation of processes.

Unfortunately, so many questions were submitted to the panel that they could not all be answered. The remaining questions were distributed to the panelists, and the answers will be available online via the PMI-OC website.

Colby Mariva Riggs, PMP

At the October Dinner Meeting

Left to right:
First time attendees

Ingy Gawdat
Greg Farina
Roz Westra
Elizabeth Shober
Rima Counte

Above: First time attendees
Vicka Stevenson and **Russ Stevenson**

Left: Job announcement
George Romney from Compuware Corp.

Above:
New PMPs

Bob Stuart
Matt Grimaldi

PRESIDENT'S AWARD

PMI-OC Chair **Victoria Flanagan** presents the **President's Award for Outstanding Contribution** to **Susan Ashwell, PMP**. Story will be in December *Milestones*.

Photos on pages 7, 8, and 9 by **Simon Hawkins, PMP** and **Greg Savage, PMP**

Member Spotlight

This month, the spotlight is on **Alvin Joseph, PMP.** Alvin has been a PMI-OC member and volunteer since August 2007.

Currently an IT manager for ERP applications at Jazz Semiconductor in Newport Beach, Alvin thought PMI® would be a good way to meet like-minded professionals in the Orange County area and an interesting way to earn PDUs.

Alvin has quite an eclectic past. He was born in Ethiopia, grew up in Nigeria, went to engineering school in India, worked in San Jose for four years, and eventually found his way to Orange County. He has been living here for the past six years. He shares some of his memories of Nigeria, recalling the massive dust storms coming from the Sahara Desert. Amazingly, the huge sand waves would engulf towns and turn daylight into darkness with zero visibility!

Alvin's initial introduction to project management began early as a control systems engineer installing systems for large process plants, including cement and power plants. He transferred the project management skills he learned as an engineer over to the information technology field, allowing an easier transition into project management roles. As a project manager, Alvin has the chance to influence the outcome of the project, resulting in a sense of accomplishment, satisfaction, and the sweet taste of victory when a project is successfully completed!

When Alvin is not working, he enjoys traveling, especially snorkeling in Maui at the Molokini Center. His dream vacation would to ride the Blue Train in South Africa. Alvin has always enjoyed trains, and riding on the Blue Train, he would experience South Africa's natural beauty while traveling in luxury.

In his personal life, Alvin's goals include spending quality time with his family and contributing to the community as much as possible. Some of Alvin's hobbies are tennis, Sudoku, reading, and volunteering for PMI-OC. Currently serving as the dinner meeting chair, Alvin looks forward to managing, planning, and organizing the dinner meeting events. The dinner meetings require quite a bit of coordination, as the agenda, presentation materials, hotel reservation, speaker engagement, audio/visual equipment, and raffles must be organized in a timely manner each month.

Regarding his greatest career accomplishments, Alvin recalled two projects he worked on. One was an executive dashboard project and the other an SAP based financial planning system implementation. The dashboard was a fast track high visibility project involving setting up dashboards for senior management to monitor corporate business performance in real-time and was completed on schedule and on budget. The project has had a positive impact on enterprise financial performance management. The SAP based financial planning system tool allows the financial planning team to perform detailed financial forecasting in a quick and efficient manner and was completed on budget and in a record four months! Alvin's goal is to advance his career to lead a large global team and eventually to lead a corporate business unit.

When asked what advice he would give to those interested in entering the project management field, Alvin identified some traits that would ease the transition: be responsible, accountable, and results-oriented. He also believes that soft skills have proved to be important components in being a proactive and successful project manager.

In a lighter note, we asked Alvin, "If you could possess one super-human power, what would it be?" He requested the ability to control time, which would alleviate tight deadlines and the power to rewind time when needed. It would also give him more time with his kids or would let him change an e-mail after he accidentally hit the "send" button.

Be sure to stop by and discuss your super power wishes with Alvin at the next dinner meeting, or just a quick "hello" would be nice too!

Bernice Maldonado

Spark of Love

The holiday season is approaching fast, and for most of us it is a time of joy and celebration, of feast and singing, and of sharing gifts with friends, family and children, especially children.

This year, more than at any time in the recent past, many families in Orange County will experience more worry than joy. With the economy down and so many breadwinners out of work, the need is as great as it has ever been. PMI-OC intends to alleviate as much worry and spread as much joy to those families as we can through our annual **Spark of Love Toy Drive**.

In 1993, firefighters throughout the five county areas of Orange, Los Angeles, Riverside, Ventura and San Bernardino joined with KABC-7 to begin the Spark of Love Toy Drive. The toys are collected by the firefighters and distributed to a number of charitable organizations for distribution to selected families.

Last year, 275,000 toys were distributed in Orange County, and our chapter contributed to almost 100 of those children. Let's beat that number and help bring more smiles this year!

We need new, unwrapped toys, books, and sports equipment for children aged from infancy to 17. Bring your gift to our December 9th meeting. **Nicheryl Knibb, PMP** and her committee will deliver them to the firefighters.

If you can't make the meeting, but want to support this toy drive, contact Nicheryl Knibb, Spark of Love Coordinator, at volunteers@pmi-oc.org.

O. Jay Murphy, PMP

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For more information about Cheetah's Project Management programs, career counseling or to register for a course, contact Jean Steinmetz at jean.steinmetz@cheetahlearning.com or call (888) 659-2013.

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Discover the Power of Project Management

A Panel and Discussion Presented by PMI-OC and Keller Graduate School of Management

The advanced topic seminar for October was quite a change from the normal speaker/Q&A sessions. I was glad that I decided to sign up and experience this panel of project managers for myself. The panel was made up of six project managers in differing fields, and the question of the day was, **"What is it about your industry that is a unique or particular challenge for project managers?"** I think the idea was that the group as a whole could discuss the challenges and offer possible future solutions.

Panelists (left to right): **Robert Pettis, PMP**; **Joseph Hamamoto, DIBA**; **Kashif Khwaja, PMP**; **Renata Weir, PMP**; **John Filicetti, PMP**; **Morgan Shih, PMP**

The PMs were asked to introduce themselves, their industries, and their major challenges. The first was **Kashif Khwaja, PMP**, a program manager working for Toyota Automotive. He is responsible for executing software and other projects. Toyota's goal is to be the number one manufacturer of automobiles in the world. Their unwritten goal is to **beat GM**. They have the leading hybrid, Prius, but their foray into the realm of trucks was not so successful. Kashif was asked how Toyota measures that goal, and he replied, "the greatest number of units sold (not profit or ROI)." Kashif shared the "14 Principles of the Toyota Way" and a story about how a misunderstanding between U.S. and Japanese cultures delayed some projects.

Principle 14: Become a learning organization through relentless reflection (hansei) and continuous improvement (kaizen). In Japan, this means that after a product goes into production, they try to constantly improve it (kaizen). In the U.S., the team misunderstood and tried to make the product perfect during the development stages before it went into production, causing many delays, until the team was refocused. Kashif thinks the greatest challenge is the conflict between the 14 principles and the day-to-day time and resource constraints.

John Filicetti, PMP spoke next, stating that in his opinion as a PMO director, the greatest challenge for PMs is to "sell themselves." PMs have to constantly keep up on all types of methodologies and technologies to be seen as "experts." He believes PMs need to be making continuous improvement and be change agents. He challenged the audience to keep up on critical chain, RUP, Agile and SCRUM, waterfall, Six Sigma, and to be aware of RACY, tollgates, and project reviews. To make an impossible situation work, a project manager **must** have a communication plan! If a project is "impossible," it got that way because someone did not have the information he/she needed to make proper decisions.

John thinks that a successful PMO is constantly changing and reinventing itself. Successful PMs become the "preachers" of project management.

Morgan Shih, PMP of TEVA is involved in project management for generic drug manufacturing. In the brand drug industry, companies are given a 20 year patent for formulas and/or processes for drug making. In this industry there are "paragraph 1" drugs, which have no patents (like aspirin), and "paragraph 2" drugs, with expired patents. "Paragraph 3" drugs do not get approved prior to the expiration of their patents, and the generic drug companies are given exclusive manufacturing rights for 180 days if they win this filing. The patent on "paragraph 4" drugs is pending, so it may become invalid, or a company may be able to break through by stating a process or manufacturing advantage over the current patent filing.

Morgan stated the overriding challenge for project managers in his industry is time. They are constantly racing to have a product and all the documentation ready for submittal to challenge a paragraph 2, 3, or 4 drug they are targeting. Sometimes they reverse-engineer a product, or try to develop a better process to compete with the branded product. They are in a constant race with the clock.

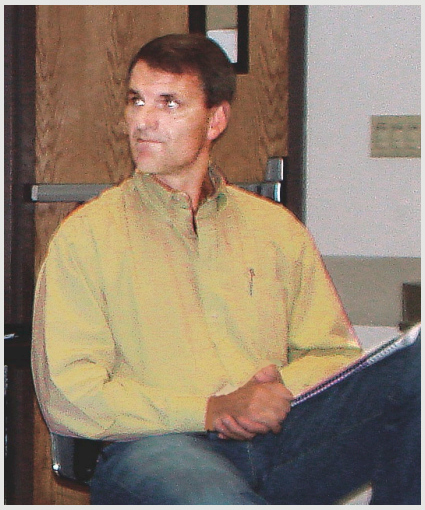
Morgan's resources are constantly working in parallel on numerous projects to meet the requirements for the company's success. FDA compliance and ICA regulations are also significant challenges.

Renata Weir, PMP is also in the pharmaceutical industry. She works for Prescription Solutions, a division of UnitedHealth Group, as a senior project consultant in pharmacy benefit management. Her company is constantly looking for formularies for all drugs

Continued on page 12

October 4 ATS Review

Continued from page 11



to be as cost effective as possible for their customers. Their revenue streams are based on volume. She knows that project managers in this industry have to be nimble change agents to win new contracts. They also need the ability to translate between the business and the customer. Challenges can come from the cultural diversity of the companies within UnitedHealth Group, but the major issue is resources. She has had many projects cancelled because of lack of resources.

Joseph Hamamoto, DIBA, is a senior faculty member of the International Business Program at Keller Graduate School of Management. Dr. Hamamoto is a very interesting speaker on business in general, and project management in particular. Joe stated that, along with honing our PM skills, we must have Industry Intelligence. He suggested taking courses on negotiations, contracts/procurement, and budgeting. Some PMs are unsuccessful due to their lack of training in these skills. Business is no longer going to take care of you. With buy-outs, outsourcing, and offshoring, the project manager must think of himself as an independent contractor. Joe told the group, "You are your enterprise network, and you have to be self actualized!" Training and education will help achieve this.

Joe gave some examples from his experience at PanAm and Panasonic Avionics about negotiating for project success. His opinions on ethics and fiduciary responsibilities for PMs opened some interesting questions and discussion from the group. If given the opportunity, I look forward to hearing Dr. Hamamoto speak again.

Tom Smith (left). a seminar attendee, volunteered to be an *ad hoc* speaker. Tom builds power plants and is currently working on one in Ladera Ranch. Since project management is very mature in construction, processes are highly regimented. The scope is clearly defined, along with the requirements. The risks are anything that could impact the scope, planned or unplanned, that may arise (weather, change of materials, union issues, early completion, etc.). Therefore, contingency planning is given a lot of time and thought. Tom said that "green" projects are some of the most challenging for a PM because the stakeholders can be hostile. Educating them to get them on board, if at all possible, is a major responsibility.

Tom shared some tools; the software they use for draw down schedules is MS Project, often with many sub projects. Earned value is done in Excel and shared per the communication plans and dashboards they have developed. Our chapter does not often hear from PMs in the construction field, and Tom did a great job providing insight into the PM tools and techniques he uses without any preparation time!

Although every speaker seemed to believe that his/her industry provided unique challenges for project managers, I think it all came back to the basics. We have three constraints that cannot all be met perfectly, yet we continue to wrestle with trying to make them stretch beyond the possible. If you change the **scope**, you must change the time or resources. The triangle remains the same **time, scope, money** (resources). All project managers face these same challenges; they just do so in different industries.

Linda M. Keller, PMP

Photos by **Louie Chanco, PMP**

PMP Exam Questions

Test your knowledge on these sample questions.

1. Program management differs from project management in that . . .
   a. It is totally unrelated to project management.
   b. It doesn't require general project management knowledge.
   c. It is subordinate to project management
   d. It may involve a series of repetitive or cyclical undertakings.

2. A member of your team brings ideas for enhancements to the scope of work to a team meeting. These suggestions will add work to the project that is beyond the requirements of the project charter. As project manager, you point out that only the work required for the project should be completed by the team, or the project could miss its goals. You are practicing:
   a. Integrated change control
   b. Scope planning
   c. Scope control
   d. Risk management

3. You are a project manager on a two year project that just delivered its final deliverable to the customer. Your customer was not available to review the deliverables; however, his assistant accepted the final deliverable on behalf of the customer. You report back to your manager . . .
   a. That the project is complete
   b. That all resources can be released to new projects immediately
   c. That the customer is satisfied with the project deliverables
   d. That the final acceptance will be obtained upon return of the customer

4. The Planning Process Group . . .
   a. Defines deliverables
   b. Facilitates project planning across multiple processes
   c. Limits the number of processes
   d. Plans the entire project prior to initiation of work

Answers are on page 14.

PMI-OC Orientation (MVOT)

The last PMI-OC Member/Volunteer Orientation Training was held in September at the UCI Learning Center in Orange, near "The Block" shopping center. We had 15 attendees, one guest speaker, and eight PMI-OC volunteers, including board members.

The event started with a delicious meal from Baja Fresh, thanks to our volunteers **Terry Hauser** and **Lori Shapiro, PMP**, who brought in the food and drinks. While attendees were enjoying the meal, they got to know each other, as well as some of the board members. I would say that the turnout was about the right size for networking because there was enough time for quality conversations with all participants. I certainly hope each one of the attendees kept in contact with someone they met in this event.

The primary speaker for the event was **Thomas Cutting, PMP**, our Membership Director. Thomas gave an overview of the purpose of this event and the PMI-OC chapter. He also spent some time browsing through and explaining the PMI® and PMI-OC websites, and it seemed to be very well received by the audience. We were very fortunate to have **Victoria Flanagan**, our Chair/President, with us at the event. Victoria's abundant knowledge about the chapter definitely wowed us, and we walked away feeling more connected with the chapter because of our new knowledge of its history.

Lori Shapiro, our Ambassador Lead, spoke about the ambassadors' roles in the chapter and how these volunteer positions are a great starting place for a new volunteer. **Beth Williams, PMP**, our Volunteer Coordinator, talked about all the volunteer positions we have within the chapter. **Nora Goto, PMP**, our Operations Director, and other long time PMI-OC members and volunteers also shared valuable information with us.

The topics that sparked the most interest appeared to be how to earn PDUs and PMP prep programs. We had lots of questions and discussions around these two subjects, and I am sure attendees took home great information.

This event would not be complete without our guest speaker **Melanie McCarthy** from ResourceXperts. Melanie revealed fantastic tips and techniques about networking in today's fast moving career marketplace.

One thing to note is that **the PMI-OC Member/Volunteer Orientation Training event has been renamed PMI-OC Orientation** to better represent the mission of the event. The next event will be conducted on November 19 at 6:00 p.m. See column at right.

To register for the PMI-OC Orientation event, learn more about other events, and to receive PMI-OC's *E-Mail Blast*, please visit www.pmi-oc.org.

See you at the November PMI-OC Orientation.

Grace Wu, PMP
Membership Committee Chair

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Wednesday, Nov. 19

PMI-OC Orientation

Formerly Member-Volunteer Orientation Training (MVOT)

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 join the PMI-OC Orientation 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 19, 2008
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 Room 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 12

1. d. **A program is a group of related projects managed in a coordinated fashion to obtain the benefits and control of the combined undertaking.**
   PMBOK® Guide 2004, Chapter 1, Section 1.6.1

2. a. **The correct answer is "a." The answer cannot be "b," as the project charter already exists. It is not "c," since no change has actually occurred.**
   PMBOK® Guide 2004, Chapter 5, Section 5.0

3. d. **"D" is the only correct answer. Until you have formal confirmation of the customer's satisfaction with the deliverable, you cannot assume the project was completed successfully.**
   PMBOK® Guide 2004, Chapter 4, Section 4.7.3

4. b. **The best answer is "b." Although deliverables are identified as part of the planning process, defined deliverables is a subset of the overall objective of the Planning Process Group.**
   PMBOK® Guide 2004, Chapter 3, Page 47

Sample exam questions submitted by
Diane Altwies, PMP
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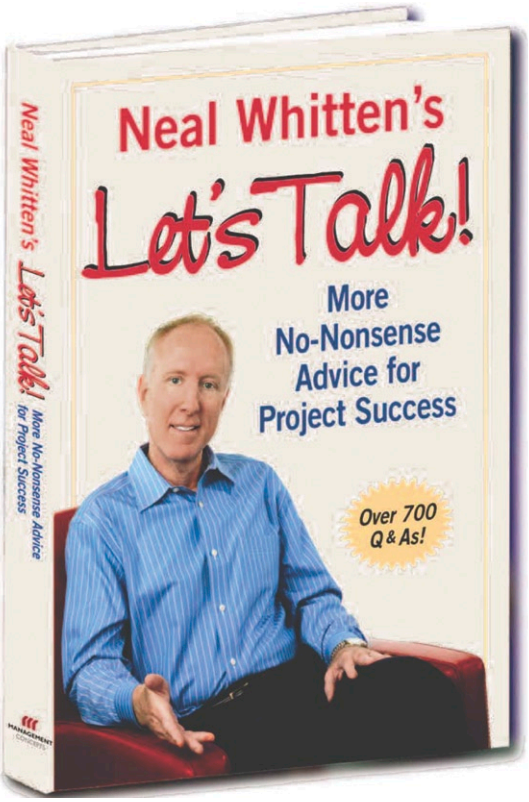

Success is born of behaviors and choices that lead to exceptional performance. When we understand what is expected of us in the workplace, our performance rises to the occasion. How would you like to ask—and listen-in as others ask—a recognized PM authority questions regarding ***best practices in behaviors*** **and other project and organizational issues** that you are facing today?

Leadership, accountability, and professional maturity issues are common on projects—too common. This highly interactive seminar addresses specific aspects of these issues head-on. Through a Q&A venue, attendees pose short problem scenarios from either a seminar-provided list or their personal list. Neal Whitten then provides best-practice solutions to handling these situations effectively.

The **problem scenarios can encompass a wide range of issues** including accountability, dependencies and commitments; leadership styles, attributes and behaviors; sharing power; interpersonal communications and relationships; resolving conflict; mentoring; ethics and integrity; promoting change in your organization; project culture; quality; roles and responsibilities; clients; management; business analysts; project sponsors; performance of stakeholders; authority; escalations; domain of responsibility; and much more.

Attendees will gain insights and concrete guidance on how to demonstrate professionally mature behavior that will enable them to perform at their best, benefiting their projects, organizations, and careers. The seminar experience is intensive, revealing, and focused, aimed at providing participants **lessons that can be applied on the job immediately and that will have long-term impact**. This seminar will also help project managers, other leaders and team members promote and actively contribute to an effective business culture.

Neal Whitten is a seasoned practitioner and instructor who can get to the heart of personal and professional issues while treating all attendees with respect and sincerity.

Date: **Saturday, November 8th**

Location:
Irvine Marriott
18000 Von Karman Avenue
Irvine, CA 92612

Earn 7 PDUs

Fees and Registration:

PMI members	**$250**
Non-members	**$290**

Fee includes seminar, materials, breakfast, lunch, and a copy of the book, ***Neal Whitten's Let's Talk! More No-Nonsense Advice for Project Success . . . Over 700 Q&As.***

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- Discuss and resolve common behavioral issues.
- Learn professional-maturity best practices.
- Become a more effective leader and coach.
- Get personal advice and mentoring on your particular issues and questions.

What seminar participants are saying…

I was so impressed with Neal's ability to role play interpersonal issues in the manner that he did. In my many years as a conference-going PM, I've never seen anyone so daring or effective in a group setting with such difficult subject matter. (Program Manager, Health Care)

Awesome seminar! I wish that all my co-workers would have attended. My organization and company need to hear this information to raise their level of professional maturity. (Project Manager, Energy)

Neal is a refreshing cross between Dr. Phil and Bill O'Reilly! (Business Analyst, Manufacturer)

Neal's experience in the real world is very impressive and brings a perspective not easily found. (Team Leader, eBusiness Development)

I only wish I had a mentor like Neal. I believe I would be further in my career. (Manager, Aerospace)

As a professor who performs a lot of speaking and conducts a lot of seminars, I attended to hear the master of presenters. I wasn't disappointed! Neal makes it look easy. It isn't! (University Professor, Business)

Highly unique workshop. I especially liked the open forum, relatively informal approach, Neal's great sense of humor and his relaxed teaching style. I don't know a speaker who could have pulled it off as well as Neal. (Project Manager, IT)

Neal Whitten, PMP

Neal Whitten, PMP, president of The Neal Whitten Group, is a popular speaker, trainer, consultant, mentor, and best-selling PM author in the areas of leadership, project management and employee development. He has written over 80 articles for professional magazines and is the author of six books.

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

False Confidence KILLERS

By Thomas Cutting, PMP

You leave for your flight well ahead of schedule. Traffic is light and you arrive, unhurried, at the airport. Strolling up to the counter, you secretly laugh at the frantic people running toward the crowded ticket line or scanning the flickering departure screens in panic. Being the saint that you are, you even let a mother with a screaming child ahead of you in line, silently praying they are not on your flight.

The kiosk attendant signals you forward and you confidently hand him your ticket. Reading his tag, you smile and say, "Good morning, William." He glances at the ticket and looks quizzically at you and rechecks the document before calling over a manager. As she scans the paper, you catch William staring at you with a smirk on his face, but he quickly turns away.

"Sir," the manager says, "were you aware that this ticket was for yesterday?" Your sense of confidence is proven false . . . and your day was going so well. Fortunately, William is too busy helping the next customer to notice the dumb look on your face.

Call it paranoia, but every time I get a strong surge of confidence, I get nervous. It seems that no matter how many times I verify project progress, something ugly always rears its head to ruin my day, like when:

- The vendor promised a strong replacement project manager for a very client intensive project. During the turnover meeting, the clueless look on his face caused a bit of doubt. Upon questioning, he admitted to never having managed a project before, never receiving project management training, and wasn't told that his new role would include project management.
- The team developing the back-end interface has been "on schedule" for testing for weeks. At every status meeting they re-state that they will be ready by June 28. On June 28, they proudly announce that they have completed the interface . . . design.
- The support team has confirmed that backups are being performed nightly. They have even told the project manager to stop repeatedly asking such a stupid question. After all, they are professionals and know what they are doing. A month after going live, the system fails. No problem. The tapes are recalled to perform a restore, only to discover that the backups never completed successfully.

How do you keep from being lulled into a false sense of confidence? I suggest you **K.I.L.L.** it.

Keep changing the questions. The project manager dealing with the "professional" support team asked to the point of irritation if the backups were being performed. She needed other questions that may have produced a different answer. "Who is performing the backups?" "When do they complete?" "How many tapes are involved?" "How long is it taking?"

For the interface problem, a simple "What will be ready by June 28?" may have uncovered a serious problem.

Even though it was a fixed bid project, asking for the replacement project manager's resume would have saved time and effort.

Insist on evidence. To ensure the project stays on schedule, you need facts, not promises. One of those facts is actual time spent and estimates to complete from the people performing the work. Minimally, this can be collected at the activity level, but preferably by task. This exposes trends before they become trouble.

Have the support team show run times and completion codes of successful executions. Check with end users to ensure successful processing. Go check the online system yourself to verify that the changes were implemented.

Continued on page 18

Coming Events

November 8: Full Day ATS

Neil Whitten is back by popular demand! Interactive seminar based on Neal's second book, "Let's Talk."

See pages 15 and 16.

November 11: Dinner Meeting

Tim Covington, PMP,
"Developing Project Managers Who Achieve Sustained Project Success"

See pages 1 and 18.

PMI-OC Leadership Institute 2008
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November 12: Full Day Workshop

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Nov. 14: SoCal Pharma LIG

Breakfast Meeting, "Change Management, A Project Case Study"
Presented by Brian Barnes, PMP
Meeting at Amylin, San Diego
Webcast at Allergan, Irvine

See www.pharmalig.org for details.

November 19:

PMI-OC Orientation (formerly MVOT)

See page 13.

December 6: ATS

Topic to be announced

December 9: Dinner Meeting

Mike Sanders, Southern Calif. Edison
"Beyond Multitasking"

Spark of Love Toy Drive

See page 9.

January 3: ATS

Topic to be announced

January 9: Dinner Meeting

Chris Covey, PMP
Topic to be announced

Coming events may be subject to change.

PMI Orange County MILESTONES
November 2008, Volume 20, Number 11

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Editors: **Roger Lew, PMP**
John Sunderson, PMP
editor@pmi-oc.org

Advertising: advertising@pmi-oc.org
marketing@pmi-oc.org

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

Inquiries: editor@pmi-oc.org

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www.managementconcepts.com/sins

OuterCore Professional Development 14
www.outercoreinc.com

Project Auditors LLC 14
www.ProjectAuditors.com

Project Insight 6
www.projectinsight.net

RMC Project Management, Inc. 14
www.rmcproject.com

UC Irvine Extension 6
www.extension.uci.edu/pmioc

False Confidence KILLERS

Continued from page 17

"We will replace the current PM with another one," should have solicited, "Can you confirm that the PM will have equal or more experience?"

For the errant development manager, reiterate that he said, "The code will be unit tested and turned over to the development environment by June 28."

Learn from previous mistakes. The saying "once bitten, twice shy" applies to both your mistakes and other project managers' lessons learned. Review the results from similar projects, and ask other project managers about the team members you inherit.

Informed optimism is far more reliable than false confidence. Keep checking the details and you won't miss your flight.

About the author:

Thomas Cutting, PMP is project manager, speaker, author, and founder of Cutting's Edge. His blog at www.CuttingsEdgePM.blogspot.com provides real world experience and lessons learned to the global project management community.

Thomas is a member of PMI-OC and has been elected membership director for 2009. See page 5.

PMI-OC Dinner Meeting

Tuesday, November 11, 2008

Program: **Developing Project Managers Who Achieve Sustained Project Success**
Tim Covington, PMP

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

**Although the hotel prepares additional meals over our committed attendee count, walk-ins are not guaranteed dinner.*

Featured Presentation Only (Members and Non-Members)
In Advance: $15.00 *At the Door :* $15.00

Parking: **FREE!**

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, MasterCard, American Express) at the door.

Make your reservation by 10:00 p.m. on Sunday, November 9, 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 10:00 p.m. on Sunday, November 9, or anyone who makes a reservation and does not attend, will not receive any refunds.

PMI ORANGE COUNTY CHAPTER

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