



JANUARY 2009 • Volume 21 • Number 1

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**January 13 Dinner Meeting**



**Portfolio Management**

**Presented by Chris Covey, PMP**

*Chris Covey has information technology experience spanning nearly 20 years in job roles such as developer, DBA, architect, technical project manager, PMO director, and director of technology.*

*Chris has supported Microsoft Project user organizations for more than eight years, and in 2001 attained his PMP® certification.*

*Prior to joining UMT Consulting Group, Chris was the collaborative solutions practice director and solutions architect for Statera, Inc., where he successfully completed multiple enterprise project management and portal solution deployments at both the national and international levels.*

**Portfolio management** has become a key capability to deliver business objectives through a portfolio of projects and initiatives. A balanced portfolio will include an evaluation of project benefits and risks to ensure that the selected set of projects represents an optimum investment for the business with well understood risks. As you prepare the budget and plans for next year, it's time to make sure that the selected projects and initiatives constitute a balanced portfolio that will help reach your objectives.

In this presentation you will learn how leading organizations estimate business risks and benefits in their business cases so that their business objectives are supported by and delivered through their project portfolio. You will receive practical information on how to:

- **Estimate risks** within a business case profile
- **Define and estimate benefits** within a business case profile
- **Develop different portfolio scenarios** to evaluate the overall balance of risks and benefits within possible portfolio selections
- **Prioritize and select** the project portfolio that best aligns to business needs for risk tolerance and benefit estimates

Vendor Showcase:

**Creative Enterprise Solutions**, www.CESLearning.com  
See ad on page 4.

**In This Issue:**

**PMI-OC ADDS TWO NEW CHAPTER FELLOWS**



PMI-OC stayed true to its tradition, and for the fifth consecutive year, added new chapter fellows during the December dinner meeting.

This year, PMI-OC recognized **Adrienne Keane, PMP** (left) and **Kristine A. Hayes Munson, PMP** (right) for their significant professional contributions and many years of volunteering and leadership.

Please turn to page 5 for the complete story.

# THE CHAIR'S COLUMN

## NEW MEMBERS

Giselle Ala Jennifer Smith  
 Denis Blofield John Snider  
 Peter Carpenter Nedal Swedan  
 Mark Cook Mai Tran

## NEW PMPs

Sergio Garon Thomas Buergi  
 David Gronendyke Tricia Carrillo  
 Agi Grooters Angela Copley  
 Gustavo Guerrero Robert Davis  
 Loren Higgins Edith Fischer  
 Don Hitchcock William Galleher  
 David Howard Ingy Gawdat  
 David King William Georges  
 Donna Kress Stephen Jackson  
 Lisa Matthews David King  
 Matt Muchmore David Martin  
 Kenin Page Bharathi Pinninty  
 Mary Romo Jennifer Relich  
 John Schindler Preeti Saxena  
 Kevin Simpson Kevin Simpson  
 Darcy Skaggs

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In this, my first article as the new PMI-OC Chair, I would be remiss if I did not recognize and acknowledge the efforts of last year's board of directors, especially **Victoria Flanagan**. Victoria set a standard of personal excellence that was inspiring.

We had a hugely successful year in 2008. Our chapter had a major website installation, including the new members-only upgrade; **Neal Whiten** provided professional development; the career fair was attended by 275 people; our monthly ATS meetings, the PMP classes, and the dinner meetings were very well-attended.

All of this could not have been done without the well-coordinated team that Victoria effectively led with hundreds of her own volunteer hours. Those team members included **Kim Fields, PMP; Tariq Shaikh, PMP; Thomas Cutting, PMP; Linda M. Keller, PMP; Nora Goto, PMP;** and **Stephen June, PMP**.

Not content to sit on our laurels, the all important question now is, "What do we have planned for the coming year?" Your 2009 board began coalescing in October and cementing our plans in November. We are looking forward to continuing our successful programs while building our professional capital by adding new programs, even in a year of difficult economic conditions.

We, your board of directors, are developing a proactive approach to the economic conditions we are all facing. Understanding that we will have an increasing number of members going through transition, we are looking to **how** we can be supportive.

In this vein, allow me to tell you that as one of the results of our last member survey, we learned that **networking** is the main reason why many of you continue to support your chapter. We are dedicated to ensuring that you have as many opportunities as possible for face-to-face networking. Additionally, we are negotiating with the Wyndham for our new contract, and we are being very insistent that they keep the costs for our dinner meeting as affordable as possible. It is our pledge to you that we will maintain the lowest possible price throughout our new contract negotiations. Also, we will continue to have the "no meal option," ensuring that you will have a monthly networking opportunity at the lowest possible cost.

In another effort to make what you need for your professional life more affordable, I am pleased to tell you that we have two PMP® preparatory classes scheduled this year **before** the exam changes to reflect PMBOK®, version 4. We made the decision to hold our prices steady for these two classes, where we fully expect the student count to be greater than sixty students. By holding the price to the \$750 standard, we are one of the lowest priced PMP prep classes in the area.

Our next class starts on January 31, and we, as always, will be looking to our one thousand PMPs to encourage as many non-PMPs as possible to examine our PMP prep classes as their primary option. It is also a great opportunity for you to pick up PDUs as a class instructor.

In closing, I want to make you aware that next month I will be unveiling a key initiative we have planned for the long-term future of our chapter. It is called "Expanded External Collaboration," and it creates and establishes a road map for us to collaborate with businesses and service organizations in a concerted effort to continue our growth as **the** leading professional business organization in Orange County. Ah, but partnership is not just for external entities. Partnership is an internal matter as well. As we move forward, there must be a role for each of us if we are to continue the growth and maturation we have experienced in our first twenty years.

Looking forward to a year of partnership that will benefit each of us,

**Sylvan Finestone, PMP**  
 2009 Chair/President

# Volunteer Opportunities

## VOLUNTEER OF THE MONTH

### Finance Director: [finance@pmi-oc.org](mailto:finance@pmi-oc.org)

#### Finance Volunteer

The finance team is looking for resources to help with any of the following functions. Taking on one of these responsibilities requires less than one hour per month.

- Help with analyzing financial information
- Help with preparing journal entries
- Help with preparing financial reports and maintenance of financial records
- Help with files and maintenance of accounts payable records
- Help with general accounting responsibilities
- Help with distributing reports and sending invoices.

This is a good way for a new volunteer to learn the interworkings of the chapter and its finances.

### Information Technology: [it@pmi-oc.org](mailto: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.

#### IT Volunteer

Design web pages, including graphics, animation, and functionality. Ensure consistency of web pages with approved style guide. In cooperation with content management, translate and implement content concepts. Advise IT director on website issues and improvements. Coordinate with Affiniscape for website support. Manage e-mail setups and address books for PMI-OC.

### Marketing Director: [marketing@pmi-oc.org](mailto:marketing@pmi-oc.org)

#### Milestones Assistant Editor

Assist with *Milestones*, the monthly PMI-OC publication. Assist editor with coordinating multiple resources and activities, gathering articles and photos, and delivery to the graphic designer. Sets the editorial tone of the publication, sometimes writes and/or edits articles. Experience with publishing, newsletters or similar activities and a strong command of the English language are required.

#### Milestones Contributors

Write 300, 500, or 1,000 word reviews of attended chapter events for *Milestones*. A strong command of the English language and clear and concise writing styles are required.

#### Milestones Photographers

Need talented and creative individuals with an eye for style to take photos at chapter events for *Milestones*. Must have a digital camera and flash unit to take photos of chapter events in indoor and outdoor venues. Must be able to send photos electronically to *Milestones* editor and graphic designer.

#### Website Editors

Several volunteers are needed to help edit our website. The website editors will look over all the pages of the website for spelling and grammatical errors and report them to the chief editors. Time commitment should amount to a couple of hours a week. Become involved in the design and maintenance of our new website!

#### 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. Ability to resize and color correct photos for the web using 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.

#### E-Mail Blast Editor

Need a volunteer to produce and distribute our weekly (Thursday) *E-Mail Blast* using Constant Contact. Content will be provided by our various groups and will need to be formatted. Some HTML knowledge would be helpful. A strong command of the English language is required.

### Programs Director: [programs@pmi-oc.org](mailto:programs@pmi-oc.org)

#### PowerPoint Coordinator

The programs team is looking for someone to create the PowerPoint presentations for the dinner meetings. You will be showing the PMI-OC PowerPoint presentation in addition to coordinating any other PowerPoint presentations from guest speakers, vendors, etc.

#### Technology Coordinator

The programs team is looking for a technician with an understanding of audio visual equipment. You will be setting up and storing required equipment; including laptop, overhead projector, and sound equipment,

## Cindy Ferguson

The PMI-OC Board of Directors is proud to honor **Cindy Ferguson, PMP** as Volunteer of the Month for December. Cindy began her volunteer work with the chapter in April of 2005. At that time, she was acting as the survey coordinator, assisting with the compilation of information for the 2006 and 2007 planning vision focus groups.

Cindy's involvement in the maturation of the electronic surveying process for the chapter was instrumental. She has worked closely with the board to help improve the response rate and effectiveness of the surveys for events such as SCCTC, monthly dinner meetings and networking seminars. Surveys are a key communication vehicle for members of the chapter. Cindy's dedication to high quality and timely delivery of results has been a tremendous benefit to the chapter and has added value to the organization as a whole.

Cindy currently resides in Los Angeles where she works for Transamerica Retirement Services. She is a seasoned project management professional with 11 years of tenure at TRS. At present, Cindy is a member of the Enterprise Solutions Group, which handles large product and infrastructure projects. Having recently completed the launch of an enterprise-scale, fully automated product for third party administration, Cindy is looking forward to her next challenge with her organization. In her own words, "I enjoy being able to take a concept or idea someone has and bringing it into reality. The detail that goes on behind the scenes, the dotting of the i's and crossing of the t's, the team, the twists and turns of planning for the unexpected (as this is what usually happens first!)."

In addition to her many volunteer activities and heavy workload, Cindy cares for her father, who is 94 years young. She also is delighted that her son recently graduated from UCSD this past May, and is now a first year law student at USD.

**Beth Williams, PMP**

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# PMI-OC FELLOWSHIP AWARDS

## ADRIENNE KEANE AND KRISTINE MUNSON NAMED PMI-OC FELLOWS FOR 2008

**F**

or the fifth consecutive year, PM-OC named new chapter fellows at the December dinner meeting. **Adrienne Keane, PMP** and **Kristine A. Hayes Munson, PMP** were awarded our chapter's highest honor, PMI-OC Fellow.

**Victoria Flanagan**, as outgoing chair/president of PMI-OC, began the award portion of the dinner meeting by briefly mentioning some highlights of the chapter's proud history and mentioning some of the people who helped build the organization into what it is today. One of these people was **Janice Preston, PMP**, a previous recipient of the PMI-OC Fellow award, who has given generously of her time and service to the chapter over the years.

Janice served on the board of directors of the chapter and has held numerous positions during her long association with the group. As a current PMI-OC Fellow, Janice, in turn, told the audience about her experience with **Adrienne Keane, PMP**, whom she met in 1996, when Adrienne took Janice's project management class at UC Irvine.

After learning about PMI® from Janice, Adrienne came to the meetings, joined PMI-OC, and soon became a very active volunteer. In fact, she was so active, that within two years, Adrienne was serving on the board of directors.

She served on the board from 1998 through 2003, and held a number of different positions, including vice president of programs, vice president of operations, trustee, and president. Recently, although no longer on the board, she has continued to serve the chapter as a respected member of the governance and nominating committees.

When Janice joined in 1996, the chapter was a small, fledgling group. During her active tenure, the group transitioned into a robust, award-winning, and globally respected chapter. As the chapter grew, Adrienne made major contributions that helped facilitate, enable, and develop this growth. For example, she played a major role in obtaining the original PMI Orange County Chapter incorporation in 1998. She also helped develop the chapter vision and mission statements that have served to guide the chapter over the years. In addition, she has facilitated annual planning sessions for both the PMI-OC and PMI-LA chapters. However, it is said that her greatest strength has been her ability to coach and mentor the board of directors, as well as other volunteers.

**Adrienne Keane** currently works for Cisco Systems, where she leads global talent programs and development initiatives. She also serves as a member of the advisory committee for the UC Irvine project management certificate program. In addition, she is currently pursuing a masters degree in applied psychology at the University of Pennsylvania, where she is learning how to use the principles of positive psychology to create and sustain high performance project teams. At home, she and her husband, Bob, are raising two beautiful daughters.



**Frank Reynolds** speaks about **Kristine Hayes Munson** (left).



**Janice Preston** (left) introduces **Adrienne Keane** (right).

Like Janice Preston, **Frank Reynolds, PMP** is also a PMI-OC Fellow, who has given generously of this time and talent in service to this chapter. He was chosen to introduce Kristine to the general audience at the December dinner meeting.

Frank described Kristine as a loyal PMI-OC supporter and volunteer since 2001. Frank also noted that over the course of her tenure, Kristine has held a number of key positions in the chapter, including vice president of communications, vice president of professional development, vice president of programs, as well as director, president, and chair of the board of directors.

Frank recalled that when Kristine was vice president of communications, she implemented the chapter's first online registration system. At the time, this was a major breakthrough for the chapter. It made a significant impact on the chapter's ability to handle registration for the increasing number of programs and classes that were offered.

Kristine served as president and chair in 2004 and 2005. The following year, the chapter received national recognition

*Continued on page 6*

## PMI-OC Fellowship Awards

*Continued from page 5*

and a number of awards for its outstanding programs and levels of service that Kristine initiated and led during her tenure. Here are just a few examples:

- 2006 Component Award for Collaboration
- 2006 Component Award for Volunteer Program of the Year
- 2006 Component Award for Component of the Year (Chapter Category III)

During 2006, Kristine graduated from the exclusive PMI Leadership Institute Master Class, and was named PMI-OC Volunteer of the Year.

Currently, she continues to serve PMI-OC by being an active member of the nominating committee. She also serves PMI Global as chair of the leadership institute committee. In addition, she facilitates the PMI-OC exam prep sessions and continues to participate in the PMI Component Awards Committee and the PMI Global Accreditation Center.

And throughout all of these volunteer efforts, Kristine has maintained her challenging job at State Street, one of the world's largest global financial services companies, where she continues to successfully lead an IT assurance and configuration management team.

At home, she is supported by her husband, Michael, and her three sons, one of whom was born during her tenure in office at PMI-OC.

A schedule conflict prevented Kristine from attending the December dinner meeting. However, she continues to be an inspiration to us all, as she manages her very busy life with a problem solving approach and a positive attitude.

We offer our sincere thanks and congratulations to both **Adrienne Keane** and **Kristine Hayes Munson**, two very deserving new PMI-OC Fellows.

**Bill Georges, PMP**

## CELEBRATING YOU, THE MEMBERS

This is an exciting time to be a member of the Orange County chapter of PMI®! We just completed a year in which the programs team brought in great speakers and pulled off several major events. Marketing produced new corporate relations brochures and other collateral extolling the benefits of partnering with PMI-OC. They also created new sponsor relationships and strengthened old ones. The IT team brought the chapter website into the 21st century, and the finance team informed us that we are in solid fiscal shape. We are entering 2009 with momentum building.

All of these contributions were made possible because of people just like you. Let's face it; without you, there wouldn't be a chapter. We could put on all the stellar events we could imagine, but if no one attended, they would be meaningless. And, realistically, without volunteers to make it happen, nothing would exist.

My role as membership director is two fold. First it requires me to make sure your voice is heard. We do this through surveys and e-mail exchanges. Last October, over 20 percent of you answered our call for feedback through the annual members survey. Second, my team is charged with encouraging you to continue your support of the chapter through remaining a member and giving back through volunteering. Over the last year, you have answered that call in large numbers. Our records indicate that we consistently had roughly 1,660 members. Of those, more than 100 people volunteered, and they collectively gave over 6,500 hours of service.

Our latest addition to the chapter celebrates you, the members. Under the direction of the IT team, a members only area now exists on [www.pmi.org](http://www.pmi.org). To access it, you need only to know your PMI member number (log on ID), your first initial and the first five characters of your last name (password). Armed with that simple knowledge, you gain:

- Registration discounts on PMI-OC events
- Easier registration with pre-populated name, address, and company information
- Access to project management related forums
- Exclusive offers from our partners

Stay tuned! 2009 promises to be a great year for PMI-OC, and we want you to be part of it.

**Thomas Cutting, PMP**  
Membership Director



### The PMI-OC Fellows

2004 **Ed Walker** (third from left)

2005 **John Bing** (unpictured)  
**Quentin Fleming** (far right)  
**Marty Wartenberg** (second from right)

2006 **Janice Preston** (third from right)  
**Frank Reynolds** (far left)  
**Julie Wilson** (unpictured)

2007 **Dave Jacob** (unpictured)  
**Kathy Sharman** (unpictured)  
**Cyndi Snyder Stackpole** (unpictured)

2008 **Adrienne Keane** (second from left)  
**Kristine Hayes Munson** (unpictured)



# Spark of Love

## Annual Toy Drive a Huge Success

Given the current economic challenges facing our nation, the holidays brought mixed emotions for many. This was not the case at the December meeting. The joy of Christmas was definitely in the air!

Thanks to the generosity of the December dinner meeting attendees, approximately 120 children benefited from this season's toy drive. A variety of gifts were donated, including stuffed animals, board games, sporting equipment, and books. With the help of our Spark of Love toy drive sponsor, the Costa Mesa Fire Department, these donations were delivered to underserved children throughout Orange County on Christmas morning.

"For the last 12 years, the Spark of Love toy drive has ensured that all children have something to smile about on Christmas Day. We (Costa Mesa Fire Department) are thrilled to be here tonight and accept your generous gifts on behalf of the children," said Firefighter Purcell (right).

The PMI-OC Board of Directors would like to express their sincere gratitude to all who donated time or gifts to make the 2008 Spark of Love toy drive a success.

**Nicheryl Knibb, PMP**  
2008 Spark of Love Coordinator



Front row: Membership Director **Thomas Cutting**, Spark of Love Chair **Nicheryl Knibb**, Spark of Love team members, 2008 Chair **Victoria Flanagan**, Volunteer Coordinator **Beth Williams**

Back row: From the Costa Mesa Fire Department: **Firefighters Mullin and Brown, Capt. Peters, Firefighter Purcell**

## PMP Exam Questions

Test your knowledge on these sample questions.

- When a process is considered to be in control, it:
  - should not be adjusted.
  - may not be changed to provide improvements.
  - shows differences caused by expected events or normal causes.
  - should not be inspected or re-worked for any reason.
- During the execution phase of the project, company ABC begins to make use of control charts on all their projects. What does a control chart help with?
  - Explore a desired future outcome
  - Determine if a process is out of control
  - Focus on stimulating thinking
  - Focus on the most critical issues to improve quality
- You have just been notified that your customer has money problems and will not be able to pay for the upcoming milestone deliverables. As project manager, you should:
  - tell everyone to stop working.
  - release 90 percent of the project team.
  - reduce the scope and begin administrative closure.
  - shift these deliverables to the next phase to give the customer additional time to obtain funds.
- All of the following are tools and techniques of "Manage Stakeholders" except:
  - Issues logs
  - Time reporting systems
  - Face to face meetings
  - Teleconferences

*Answers are on page 11*

*Sample exam questions submitted by:*

**Diane Altwies, PMP**  
Core Performance Concepts, Inc.  
[www.coreperformanceconcepts.com](http://www.coreperformanceconcepts.com)

# CALL FOR NOMINATIONS



## 2009 PROJECT OF THE YEAR

The PMI® Project of the Year (POY) Award recognizes the accomplishments of a project and the involved project team for superior performance and execution of exemplary project management.

Nominated projects must

- Have been completed and accepted as complete by the owner or client prior to nomination,
- Have met or exceeded owner or client needs as evidenced by a supporting letter from the owner or client,
- Have met or improved upon budget and schedule performance when compared to original budget and schedule goals,
- Have applied project management techniques in an original way, including innovative application of practices,
- Have advanced the technical aspects and image of the project management profession as demonstrated by effective application of the principles set forth in *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)*, and
- Have utilized special management team actions to overcome the complexity of the project and unusual conditions, issues and barriers.

There are three levels of competition for the 2009 PMI Project of the Year.

### Preliminary (Chapter) Level:

POY nominations must be submitted to PMI-OC no later than **January 26, 2009**. A PMI-OC panel of judges will select the chapter's nominee (PMI-OC POY) no later than the first week of March, 2009. The PMI-OC POY project manager will submit the nomination to PMI no later than the third week of March, 2009.

### Semi-Finalist Level:

A PMI panel of judges will select three semi-finalists from nominees submitted by individual PMI chapters. The three semi-finalists will be selected no later than the second week of May, 2009 and will be submitted for finalist judging no later than the first week of June, 2009.

### Finalist Level:

A final PMI panel of judges will select the 2009 PMI Project of the Year from the three semi-finalists. The recipient will be selected in mid July, 2009, and the award will be presented at the PMI Global Congress, North America, in October, 2009.

For detailed project criteria and specific submission instructions, go to: <http://www.pmi.org/WhoWeAre/Pages/Project-of-the-Year-Award.aspx>.

For chapter level details, visit [www.pmi-oc.org](http://www.pmi-oc.org), or e-mail [POY@pmi-oc.org](mailto:POY@pmi-oc.org).



### Deadline for Nominations:

*Preliminary chapter level submissions are due no later than January 26, 2009. They are to be submitted to PMI-Orange County Chapter.*

### Who Should Participate:

*Projects from throughout the world are encouraged to participate, regardless of size, industry type or location. PMI® affiliation is not necessary.*

### Who Can Nominate:

*Anyone. Initial nominations should be made to PMI-OC.*



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

The 2008 PMI Orange County Chapter Project of the Year was awarded to Edison SmartConnect™ Advanced Metering Infrastructure (AMI), Phase II. See June 2008 *Milestones*.

The 2008 PMI Project of the Year was awarded to Hatch Ltd. for its expansion of Quebec Iron and Titanium's (QIT) Upgraded Slag (UGS) plant in Sorel-Tracy, Quebec, Canada. The project was completed three months ahead of schedule and saved \$15 million. During the project, there were no lost time accidents in 525,000 hours worked.



# ADVANCED MULTITASKING



**Mike Sanders, PMP**, a project manager at Southern California Edison, was a lively speaker at the December dinner meeting. Mike offered an alternative view of the process of multitasking. Do more, work less, be happy.

He opened with several dictionary definitions of multitasking such as:

- Ability to do more than one thing at a time
- Performing multiple tasks at one time
- Concurrent operation by one CPU of two or more processes

When we think of multitasking logic, we compare our brain to a computer's CPU. We believe our brain is like a CPU, which can co-process, by doing more than one thing at a time. But is this really true?

Mike considered himself a very competent "multitasker," so he decided to prove this to himself by establishing a set of multitasking metrics.

- **Task loading:** tasks in process, on my plate each week
- **Completed tasks:** tasks completed each week
- **Overtime:** hours worked over 40 per week
- **Health:** relative body weight, sleep quality, and regular exercise
- **Happiness:** personal fun and work enjoyment
- **Relationships:** both personal and business

Mike applied these multitasking metrics for over a year and realized that he actually was not a competent multitasker, but was a multitasking failure. He did not expect this result. He was juggling twice as many tasks than the year before and was doing more things. The outcome inspired him to find out what was really going on.

He questioned whether he was really multitasking, and as a result performed research on the subject. He found an illuminating quote from an ancient philosopher, "To do two things at once is to do neither." His research on multitasking brought him to the realization that he was not multitasking like a CPU, since images of the previous tasks were clouding his mind when working on the next task. Mike concluded that he was not multitasking; he was actually "task switching." Some characteristics of task switching are:

- Often, many times per minute
- Often, without assigning thoughtful task priority
- Often, without regard to task scope
- Often, without considering the resources required to perform the task

Generally, when we attempt to multitask, we task switch poorly, since what we are really doing is just dropping one task and starting another. We do this without carefully leaving the task, or disengaging. Mike discussed the enormous cost of multitasking in terms of time, productivity, and faulty prioritization of the tasks. As a result, on any given day, you could actually be 100 percent ineffective.

Some of the barriers to task switching are task complexity, switching frequency, and everyday distractions. We need to learn to switch tasks easier and more productively or enable switching.

The three task switching enablers are:

### Setting task priorities

- Set task priorities ahead of switching.
- Pre-set task priorities promote faster, more accurate switching.
- Pre-set task priorities reduce lost time by always working on the right tasks at the right time.

### Creating task queues

- Plan for "task switching" by creating task queues in advance.
- Set up queues to re-engage tasks faster and with more accuracy.
- Update task queues each time you switch tasks.

### Disengaging tasks properly

- Before switching off of a task, disengage properly.
- Note its status, due date, next steps, and constraints.
- Updated task queues help you re-engage tasks faster and more accurately.

Mike next discussed the importance of thinking with your high brain, or cerebral cortex. He presented the concept that we all have three brains. The three brains include the physical brain at birth (automatic functions like breathing and heart beating), the emotional brain (limbic), and the high brain (cerebral cortex) for problem solving and analytical thinking. He stressed that knowing about your three brains is extremely important when setting your task priorities. By default, we use the wrong brain to prioritize our tasks. High-level thinking when setting task priorities is important since that brain is not acting in an automatic or emotional manner.

Mike conducted a meditation exercise with the audience that he finds useful in preparing his brain for high level thinking when setting daily priorities. In his micromeditation breathing exercise, he imagines he is unpeeling a banana. Each step takes ten seconds.

- Breathe in, exhale. • Peel one side of the banana, touch.
- Breathe in, exhale. • Peel one side of the banana, feel.
- Breathe in, exhale. • Peel one side of the banana, bite.

Once you have done your micromeditation, Mike suggested using the following power tools to assist in establishing your priorities. The "powertasking" tools assume that you are working on one task at a time. These power tools will help you work on one task, the right task, and at the right time, which will make you more focused and more productive.

- Prioritize tasks in advance.
- Create task queues.
- Disengage tasks properly.
- Delete tasks when you can.
- Delegate tasks when you can.
- Transfer tasks when you can.
- Shave tasks when you can.
- Breathe, look up.
- Get feedback in real time and apply it.

Mike concluded by asking two questions, "Why does your brain freeze at times?" He reviewed his list of the reasons, which included confusion, fear, guilt, and gratification. The second was, "So what will you do?" His response was, "Multitask; try to do more than one thing at a time poorly, or powertask; do one thing at a time powerfully."

Go to <http://www.vstream.com> for Mike's power tool templates. They include a planner, a task trigger setup, a task disengaging and re-engaging chart, and a spreadsheet with a heading filtered task list.

**Colby Riggs, PMP**



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Day 1 Speakers and Topics



Genevieve Bos, Keynote
Owner and Co-Founder, PINK Magazine
TOPIC: SECRETS and INSIGHTS from America's Most Successful Women in Business



Patricia Shafer
President, Compel Organizational Excellence Alliance
TOPIC: POWERFUL AND CONNECTED: A Half Day Interactive Workshop for Women Transforming Their Work Environment



Sandra Yancey
Founder and CEO, eWomenNetwork
TOPIC: RELATIONSHIP NETWORKING: The Core Components of Effective Networking

Day 2 Speakers and Topics



Donna James, Keynote
Past President of Nationwide Strategic Investments - On the Board of CocaCola Enterprises and Limited Brands
TOPIC: MENTORING: Maximizing the Value of Mentoring in Your Life and Career



Shannon Cassidy
Executive Director, Bridge Between, Inc.
TOPIC: POWERFUL NEGOTIATION: How Questions Lead to Solutions



Margie Warrell
Executive and Life Coach - Author, Find Your Courage
TOPIC: THINK BIGGER, LIVE BOLDER! Achieve Greater Success at Work and Beyond



Jacqueline (Jacqui) Welch
Senior VP, Turner, a Division of TimeWarner
TOPIC: SUCCESSION PLANNING: Living Into a Future That You Create



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## At the December Dinner Meeting



### Left to right:

Phen Chen  
Joanne Hart  
Tim Covington  
Erin Carey  
Sameer Guray  
Mary Kay Allen  
Karen Agg  
Bharath Anath  
Gabriel Blanc-Lain  
from Qtask,  
December sponsor  
Sabine Richter  
Renata Weir

### Right:

Dinner meeting  
attendees enjoy  
Qtask presentation

### Below:

New PMPs  
receive their  
commemorative  
mugs

## Answers to PMP Exam Questions

From page 7

**1. a. Processes should not be adjusted if they are determined to be in control. Processes may be changed only through established change procedures. An adjustment implies an informal change falling outside those procedures.**

*PMBOK® Guide 2004,*  
Chapter 8, Section 8.3.2

**2. b. Determine if a process is out of control**

*PMBOK® Guide 2004,*  
Chapter 8, Section 8.3.2

**3. c. The best choice is to give the customer some value for their money already spent and close out the project.**

*PMBOK® Guide 2004,*  
Chapter 12, Section 12.6

**4. b. Time reporting system**

*PMBOK® Guide 2004,*  
Chapter 10, Section 10.4.2



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## Member Spotlight



There is a passion, and there is PASSION. **Jim Aksel** is PASSIONATE about project management and scheduling. This October, Jim was recognized for his contribution to the profession with a Most Valuable Professional (MVP) award from Microsoft, perhaps the highest honor for any technical professional.

Have you ever wondered about the kind of people who selflessly spend time answering our technical questions on project management blogs? The MVP is not a credential that can be achieved through coursework, but is recognition by your peers of both your mastery and your ability to help many others in your field, and it takes years to be tapped. There are only 30 project management MVPs in the entire world, and only nine in the United States. We are fortunate to have such a resource, and professional example, in our midst at PMI-OC.

Jim grew up in Syracuse, New York, and came west to work for Boeing in Seattle. He was a self-described “band geek,” who still plays classical French horn and jazz trumpet. In fact, his whole family now plays trumpet, and during the holidays they get together and play Christmas music. He is married, with two sons and two grandchildren.

Work on the B-2 bomber brought Jim to Southern California in 1982, and Northrop Grumman is where he grew into a project manager. The advice he would give a new PM is to “get good at it.” Study, get experience, ask a lot of questions, and find a mentor. He believes a mentor-disciple relationship doesn’t have to be formal, and that one can have several mentors at the same time. These are people who welcome a lot of questions and are willing to show you the ropes, believe in you and your abilities, and let you make little mistakes to learn from.

Jim was hired by Toshiba in 1998 to start a successful program office. From there, he moved to Rockwell Collins and had one of his most enjoyable projects, putting Internet connections and on-demand movies in commercial airlines. He got to travel the world and would like to do more traveling for pleasure, instead of business. His most memorable travel experience was in Frankfurt, Germany. While in the airport awaiting his flight home, he left his belongings to get some breakfast. When he returned, he found the person he left watching his belongings sound asleep and all his luggage, passport, wallet, and tickets gone. He had to stay an extra week and said that figuring out how to live on 50 Euros was a project in itself!

Jim joined PMI-OC in 2001 to learn more about project and program management, and PMI-OC inspired him to get his PMP®. He was one of the first 100 people worldwide to take the new PMI-SP (Scheduling Professional) exam, and is now a PMP-SP. He has also earned master’s degrees in both management and computer science. He said he “fell into” his current position as Celeris Systems Director of Project Management through his connections from the B-2 project ([www.celeris-systems.com](http://www.celeris-systems.com)). He manages six to eight consultants at Celeris and also teaches computer science and project management at Chapman and at Embry-Riddle Aeronautical University. In his spare time he surfs (the internet), learns more about project management, reads high-tech suspense novels, and plays with his grandchildren and model trains. His goals are to remodel his house, help his company grow, and take a cruise to Alaska.

Say hello to Jim, and congratulate him on his prestigious award! To find out more about the MVP Award, check out <http://mvp.support.microsoft.com>.

**Sharon Welden, PMP**

## Scholarship Available

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

The annual scholarship is given in memory of **Charles Lopinsky, PMP, PMI Fellow**. Charlie left behind a legacy of service to PMI. Joining PMI in 1971, he was an active volunteer with both the PMI-OC and PMI-LA chapters, as well as with the institute itself.

Competitive scholarships are based on merit, as measured by academic performance, co-curricular and extra-curricular activities.

**June 1, 2009 is the application deadline for this scholarship.**

For more information, go to: <http://www.pmi.org/pmief/scholarship/scholarship-lopinsky.asp>

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# PMI-OC CELEBRATES 20 YEARS

**IT ALL BEGAN**, as it should, with a project. **Kathy Sharman** was assigned the task of setting up a program management office for the IT Systems Division of Pacific Mutual Insurance in 1987.

Kathy and coworkers **Frank Reynolds** and **Julie Wilson**, among others, attended a meeting of the Los Angeles chapter of the Project Management Institute to learn more about project management and PMI®. They initially encountered a traditional way of thinking and the application of project management to only engineering, construction, and manufacturing. Armed with new ideas about the relevance and use of project management in the insurance and other industries, this core group soon began exploring the idea of forming a local chapter of PMI in Orange County.

They joined forces with founding trustee **John Bing**, who identified and contacted a list of 40 initial members of this chapter. The vision of PMI-OC's founders included more diversity and balance in membership, disciplines, industries, and opportunities.

In the fall of 1988, a questionnaire was sent to 100 members of The Project Management Institute living in Orange County. The

questionnaire stimulated interest in starting and attending local PMI meetings. Through the enthusiastic efforts of the program development team assigned to this task, a new chapter of PMI based in Orange County was announced in April 1989.

The hard work of volunteers led to the election of interim officers on February 16, and the first of four dinner meetings on April 18, 1989. The goals of the newly formed PMI-OC Chapter were to better serve the needs of Orange County members with high quality meetings in a convenient location and to attract and retain talented project management practitioners in a variety of industries in Orange County.

The April 1989 edition of the *Orange County Program News* included a call for volunteers in the areas of programs, membership, and a newsletter, along with a request to suggest names for this newsletter. The first edition of *Milestones* was published that year.

This month, we begin our celebration of 20 years of PMI-OC by highlighting our accomplishments.

**Vinita Jha**

## 1989

- October: PMI-OC charter recognized in the year of Orange County's 100th anniversary
- First *Milestones* newsletter
- First marketing brochure
- First chapter logo (old PMI® "target" graphic)

## 1991

- Named PMI® Chapter of the Year for chapters one to four years old

## 1992

- First PMP® Prep Workshop
- Named PMI Chapter of the Year for chapters one to four years old

## 1994

- Supported local educational institutions with project management training
- Received PMI Chapter Five Year Milestone Award

## 1995

- Named PMI Chapter of the Year for chapters older than five years

## 1997

- Named PMI Chapter of the Year for chapters older than five years
- Marty Wartenberg received PMI 1997 Chapter President of the Year award

## 1998

- Launched new chapter logo incorporating PMI Global's new standards (component box with PMI wordmark/logo)

## 1999

- Membership reached 500 in September
- Approved new bylaws, mission, vision, and organization structure, effective January 1, 2000
- Implemented first formal feedback forms for dinner meetings
- Received PMI Chapter Ten Year Milestone Award

## 2000

- Incorporated chapter and revised bylaws
- Received PMI ACP Opportunity Fund Award for Generous Contribution

*Continued on page 16*

*Continued from page 15*

## 2001

- Launched Dinner Meeting Ambassador, Volunteer of the Month, and Volunteer of the Year programs
- Offered own second PMP Prep Workshop session in fall, which was separate from PMI-LA
- Accepted credit cards to pay for dinner meeting registrations
- Revised chapter logo (sunset, palm tree, grass, beach)
- Received PMI Chapter Professional Development Award for Exceptional Activities

## 2002

- Membership reached 911
- Celebrated 200th PMP
- Recognized Lew Siegler as 2001 Volunteer of the Year
- Held first Breakfast Roundtable
- Distributed first annual web-based membership survey
- Supported launch of PMI California Inland Empire Chapter
- Redesigned website to accept credit card payments with online registration
- Developed first formal strategic plan
- Cyndi Snyder received PMI 2002 Chapter President of the Year award

## 2003

- Membership reached 1,000
- Celebrated 300 PMPs
- Recognized Dave Jacob as 2002 Volunteer of the Year
- Held first recurring Advanced Topic Seminars
- Revised and formalized Strategic Plan Process
- Initiated Charles Lopinsky Memorial Scholarship

## 2004

- Membership reached 1,200
- Celebrated 500 PMPs
- Wind River's TAZ Project named PMI-OC Project of the Year
- Recognized Mike Graupner as 2003 Volunteer of the Year
- Launched third (summer) PMP Workshop session
- Approved new bylaws and organization structure, effective January 1, 2005
- Celebrated 15 year anniversary, same year as PMI's 35th anniversary
- Revised chapter logo (OC wordmark over waves)
- Honored Ed Walker as first PMI-OC Fellow

## 2005

- Membership reached 1,500
- Exceeded 800 PMPs
- Recognized Cornelius Fichtner as 2004 Volunteer of the Year
- Named Askeland Engineering's Nacra A2 Project PMI-OC Project of the Year
- Launched Executive Advisory Council seated by three local executives from SCORE/ECofOC organizations
- Launched New Member/Volunteer Orientation Training sessions (MVOT), conducted every other month
- Conducted chapter's first one day PM conference, PMInAction
- Hosted special dinner meeting featuring Gregory Balestrero, PMI CEO
- Held first online board of directors election
- Introduced new Chapter Purpose Statement: "Providing members quality professional development and networking opportunities"
- Honored John Bing, Quentin Fleming, and Marty Wartenberg as PMI-OC Fellows

## 2006

- Recognized Melanie McCarthy as 2005 Volunteer of the Year
- Named Hoag Memorial Hospital's Sue and Bill Gross Women's Pavilion Project PMI-OC Project of the Year
- Hosted First Annual Career Fair
- Kicked off annual planning to develop a first-ever three year vision
- Received three awards at the PMI North America Global Congress for our achievements in 2005; Chapter of the Year (Category III), Volunteer Program of the Year, and Component Collaboration Award
- Honored Frank Reynolds, Kathy Sharman, and Julie Wilson as PMI-OC Fellows

## 2007

- Membership reached 1,700
- Recognized Kristine Hayes Munson as 2006 Volunteer of the Year
- Named SCE SmartConnect AMI (Advanced Metering Infrastructure), Phase I, PMI-OC Project of the Year
- Honored Dave Jacob, Janice Preston, and Cyndi Snyder Stackpole as PMI-OC Fellows

## 2008

- Recognized Roger Lew as 2007 Volunteer of the Year
- Named SCE SmartConnect AMI, Phase II, PMI-OC Project of the Year
- Converted *Milestones* from print to online
- Upgraded website to include a more robust shopping cart and a members only area
- Honored Adrienne Keane and Kristine Hayes Munson as PMI-OC Fellows



# Project Management in Uncertain Economic Environments

**O**n Saturday, December 6, six experts met to discuss the impact of the recent economic downturn on their industries, to discuss problems they have encountered because of this downturn, and to discuss trends they see evolving.

Our panelists for this seminar discussion were: **Kristine Hayes Munson** (financial services), **Robert Pettis** and **Chris McCune** (manufacturing), **Alvin Joseph** (semiconductor manufacturing), **Phil Quigley** (aerospace and defense industry), and **Sharon Welden** (independent consultant).

**First, the panelists were invited to discuss the issues each has faced in his/her job or industry caused by recent economic shrinkage.**

Not surprisingly, Kristine faced the greatest impact from this development. Her company provides back office services and settles trades for one of the primary participants in the \$750 billion bailout of the financial industry. In a very short time, they were required to unwind a large number of invalidated trades and set up an infrastructure to support \$300 billion worth of commercial paper purchases.

Phil said that the aerospace and defense industries have their own sets of problems, but are relatively insulated from the financial markets.

Alvin listed many issues he is facing. An increase in mergers and acquisitions has created greater challenges with the integration of new systems and the loss of key team players through layoffs. Project managers have to work with new internal teams every few months. People are required to wear multiple hats, and fast-track projects are now more common.

Sharon informed the group that, as independent agents, project management contractors must learn to shift with the economy. She is currently working with a retail entity that is actually growing during this downturn.

**The panelists then identified challenges they were facing. These were common across all of the industries.**

Outsourcing will continue to drive decisions. It can actually cost more to offshore production, but the idea has so much political momentum now that few people are taking the time to calculate the real cost of doing business overseas. Phil pointed out that some organizations are more time-sensitive than cost-sensitive. Because of their business model, they must have short turn around times. These companies will not succumb to the temptation to offshore their primary business.

Operating in a global environment dramatically impacts communications. Whereas in years past, the PM could assemble a team around a single table and lay out the foundation of an effective plan, those days are rapidly disappearing. Working globally means using

digital communication tools and telephones to communicate what used to be done in person and on a whiteboard. This is a much less efficient communication model because there is no longer a common interface.

Dashboards are a great tool IF they pull the right data and present it succinctly. Departments often produce reports no one reads because they erroneously think the reports are “required.” As project managers, we need to know what is important to our information consumers.

Changing corporate cultures require us to report only “green” on our dashboards. Leadership needs to establish a “culture of truth.” We currently have too many people who do not want to discuss problems with the executives who can do something about them. This problem is sometimes exacerbated by a management team that is asking for non-essential information.

All participants agreed that a clear, common vision is a prerequisite of success, and corporate politics and bureaucratic restrictions are common obstacles to rapid implementation. Sharon credited strong leadership and an ability to quickly adapt existing infrastructures for a recent “win” on one of her projects.

Alvin stated that in his company, many functional managers are trying to run projects and don’t do a very good job of it. Project management must be viewed as a valuable discipline that contributes to the bottom line.

**The panelists noted trends and changes required by the current economic environment:**

Phil observed that, in recent years, project managers have become more clerical and bureaucratic. He hopes that one positive result of the current economic situation is that it might help re-instate a “get things done” mindset. Robert agreed that PMs need to be more results oriented. We are often seduced by the allure of what technology can do, rather than the impact it has to our project outcomes.

Chris stated that streamlining project requirements and documentation has enabled his company to dramatically reduce delivery times and increase value. They are focusing on KPIs and letting other things go.

*Continued on page 18*

**Below:** ATS Chair **Judith Berman** introduces the panelists. *Left to right:* **Robert Pettis** (moderator), **Chris McCune**, **Sharon Welden**, **Alvin Joseph**, **Phil Quigley**, and **Kristine Hayes Munson**



Photo by Louie Chanco, PMP

## December ATS Review

Continued from page 17

Phil also observed that lower level employees are collaborating on common issues in cyberspace. Since this violates corporate confidentiality, some companies are trying to set up networks to allow employees to collaborate within a secure environment. Robert added that this type of interaction requires a different skill set to successfully interact. Innovations in technology require greater development of our skills and a greater emphasis on electronic security.

In the future, PMI® needs to be more rigorous in the development and certification of PMP® skill requirements. These should align more with the discipline required in the manufacturing or construction sectors, which tend to be more demanding than others.

**The job outlook in the current economic environment is down, but a few opportunities exist.**

Phil predicted that aerospace may continue to have openings. Kristine noted that, while her company has not been hiring full time employees, they have hired quite a few contractors, even when they cost more.

Alvin stated that the semiconductor industry has a very bleak forecast. Companies with user friendly interactions with technology (like Apple's iPhone) will present the most opportunities. Chris rounded out the discussion by stating that many low-end products are now commodities and are being shipped overseas. He pointed out, if you are not a niche player, you may not have much protection, so find a niche! If you can wear many hats, then there will be opportunities.

**To round out the event, the panelists discussed, "What makes an effective PMO?"**

What works is a simple model with clear definition of what documentation is critical. The effective PMO partners interact effectively with production to clarify priorities and deliverables. Finally, an effective PMO serves as a resource for the PMs, adding value and reducing their workload. What does not work is an unclear mandate or an inaccurate assessment of what metrics are required to track progress. "Percent complete" is often a complete fabrication.

**Norman Naylor, PMP**

# PMI-OC BOARD OF DIRECTORS

## 2009 Offsite Planning Sessions

One of the first tasks of the incoming PMI-OC Chair is to hold an operational planning session for the coming year. This meeting usually occurs over a full weekend or on two separate weekends. This past November, the current and incoming board members met offsite for two Saturday sessions.

**Sylvan Finestone, PMP**, the incoming chair, with the help of **Cornelius Fichtner, PMP**, the incoming director at large (advisor), planned an intensive agenda for two packed days. **Gwen Finestone, PhD**, an experienced facilitator, kept the meeting on track by setting the ground rules and keeping it on schedule. Part of the first Saturday session's focus was to build an operational groundwork for the board members. Gwen presented a "Board 101" session, providing input on the responsibilities of board members, as leaders and as key chapter volunteers, and reviewed the reasonable expectations of all chapter leaders. She left the team with several excellent quotes on leadership, including a memorable one from **Harry S. Truman**, "A leader is a person who has the ability to get others to do what they don't want to do, and like it."

After a review of the chapter's processes and procedures was presented, **Thomas Cutting, PMP**, the chapter's membership director, reviewed the membership survey (which can be downloaded from the PMI-OC website), and **Derek Barraza, PMP**, the incoming programs director, made a presentation on bundled marketing, a strategic approach to marketing our chapter's programs and services to our community.

Finally, Sylvan presented the 2009 vision and showed how we were already scoring high on the PMI® balanced scorecard. The remainder of the day focused on review of our area plans and budget, and our commitment to the future of our chapter. Our "homework" was to take the feedback we received and begin developing the 2009 area operating plans and budgets.

The second Saturday, the board members met for a morning session to review the revised area plans, which had been created over many hours during the two weeks between the meetings. We invited our second tier leaders (including committee chairs, *Milestones* editors/writers, event planners, volunteer coordinators, and IT volunteers) to join us for lunch. Afterwards, the incoming 2009 directors shared their area plans, and the volunteers provided feedback and input.

The two days were very productive, and bringing the larger team together the second day helped the directors share their strategic direction with the chapter leadership. Some of the attendees shared feedback on the experience. **Alfredo Martinez**, the new Project of the Year coordinator, stated, "This was my first exposure to the BOD, and it was refreshing to see such group of committed leaders gather together for a single purpose: to serve the members they represent. I was impressed with the talent assembled in the room and their focus on putting together a strong tactical plan and a visionary strategic road map for the years to come."

**Robert Pettis, PMP** a volunteer for the programs team, said, "I wonder how many of the chapter members have an idea of how much planning and volunteer work goes into developing and delivering a quality program."

After two long sessions, and many hours of preparation and execution, it's clear that the PMI-OC leadership is committed to the members and to the project management community they serve.

**Lori Shapiro, PMP**  
2009 Marketing Director

# How to Budget Your PMP Exam Study Time

By Cornelius Fichtner, PMP

Studying for the PMP® exam is going to take a big chunk out of your day, and you might be wondering how you're ever going to find the time to do it. Between work and personal obligations, you might think you don't have the time to study. Don't be discouraged.

One of the first things you should do is sit down and write out everything you do during the day. This should include meals, work, playing with children or family obligations, personal care, housework, recreation, your job, and anything else that you spend your time on. And remember, you're the only one that sees this list, so don't pad the time you spend on cleaning the house; nobody cares if you spend five minutes or five hours on it. Be realistic and honest as you assess your time and how you spend it.

Now that you know how much time you spend on various aspects of your daily life, you might be surprised at how much time you have left over. Your job now is to bring structure so that you have a block of study time every day without compromising your job or personal life. But before you can decide how much of your time you'll spend on studies, you must be realistic. If you plan to spend three hours per day on exam preparation, but have to give up all your leisure time for it, you're probably going to fail. Realistic time budgeting must allow for down time or you'll eventually burn out, so allow one full day per week to walk away from your work and studies and enjoy yourself.

Be sure to look at work projects that might take up extra time and eat into other areas of your life. Are you going to have to sacrifice some study time in order to fulfill your work obligations? Do you have a big project coming up next month? If so, you might have to think about rescheduling your exam and extending your study time. It does no good to have a working time structure if it will be disrupted in a few weeks. When is your vacation scheduled? Don't even think of using that vacation time for study! Is there a family event, such as a wedding or reunion, approaching?

Now that you've looked at possible future scheduling issues, work obligations and family plans, you know how much time you can spend studying and preparing for your PMP exam. Go back to your daily schedule and look at it closely. Determine what time of day would be best to hit the books. If you can pinpoint the time of day that's best for study, you've solved half the problem. If you cannot pinpoint a specific time, you may want to look into alternative learning methods that enable you to learn throughout the day. For instance with an audio based course on your MP3 player.

Are you exhausted and brain-weary when evening comes? In that case, you might want to consider a quiet time in the morning before work to do your studies. It's been proven that the brain is at its most receptive in the morning, so if you're too tired at the end of the day, morning might be a better time for you to study. You might want to do it right after work or after dinner. Choose a time that's the least stressful for you, when you'll have a minimum of interruptions and stick to the amount of time you've blocked out for this task. Remember, you're working for your project management certification, so consider this your most important project and manage it efficiently!



## About the Author:

**Cornelius Fichtner, PMP** is an international project manager and noted PMP expert. His PM PrepCast at [www.pm-prepcast.com](http://www.pm-prepcast.com) has helped over 3,000 project managers prepare for the PMP exam. He is also the host of The PM Podcast at [www.thempodcast.com](http://www.thempodcast.com) where you can hear his free interviews with project management experts from around the world. Please send your comments to [pm@pm-prepcast.com](mailto:pm@pm-prepcast.com).

Cornelius currently serves as PMI-OC Director at Large.

# Quick Tips for Dealing with Difficult People

By Margaret Meloni, PMP

Your hands are sweating; your stomach is in knots. Once again you need to sit down and discuss your project requirements document with that obnoxious team member. The one who just drives you crazy. If you say left, they say right. But that's okay, because you put it off until the very end of the day. You immersed yourself in other work and did not bother to think about this conversation. After all, why waste time on a no win situation? You are going to stop by their desk, tell them how it will be and then go home.

But what if there were another way? It is not likely that the difficult person will change for you, but you can change the way the two of you interact. You can take more control of the situation and work towards a positive outcome on your project.

Consider this approach:

- Prepare for the conversation in advance. Identify what you hope to gain from the interaction and begin with this end in mind.
- Be flexible; do not be so focused on your end goal that you cannot take a detour in the conversation. This detour may help you understand the perspective of your difficult person.
- Select a time that is convenient for both of you. A time when you can both can listen and exchange information without additional pressures or distractions.
- Listen; really listen, to what they are saying. If they say something like, "I cannot do that," or, "That will not work," ask them why. Whatever issue they have may not be about you. Try to get the real problem out in the open.
- Maintain emotional objectivity. Remember, whatever drives them to be difficult is about them, not about you.
- An individual who is upset may become defensive and verbally attack you. Stay calm, take a deep breath and pause before responding.

*Continued on page 20*

## Difficult People

*Continued from page 19*

If the discussion gets too heated, recommend that you both take some time to cool off. Then agree upon a time when you will reconvene. No matter how difficult, stick with the situation until you have both been able to understand one another.

It is quite possible that your difficult person is reacting to a quality in you that they can't deal with. Are they this way with other project team members or are you the only one? If no one else has problems with them, that's a tip-off that you may unwittingly be contributing to the situation. A little introspection may be the key to turning a difficult person into one who is cooperative and pleasant to work with.

If your difficult person is viewed this way by others, it would be doing him or her a favor to sit down and frankly discuss the situation. This can be tricky, of course, but you really don't have much to lose. They probably don't know that they are being difficult or that people dread having to stop by their desk and talk with them. Having a private discussion with them in a calm and rational manner might be all that's needed to turn your difficult person into a valuable project team member.

If all else fails, you may just have to resign yourself to the fact that you must work with a difficult person. Doing so with grace and good humor will set an example for others, as well as making the situation a bit less stressful for you.



### About the Author:

**Margaret Meloni, MBA, PMP** is an executive coaching consultant for IT professionals. She helps project managers and teams work together better by improving their soft skills. Learn how to successfully combine your technical and soft skills in her lectures at PM Lectures, [www.pmllectures.com](http://www.pmllectures.com), and Meloni Coaching at [www.melonicoaching.com](http://www.melonicoaching.com).

# Three Ways to Stand Out as a Project Manager in Today's Economy

With the current economic conditions, an increasing number of people are either afraid of losing their jobs or desperately searching for work. Just like it's a buyer's market for housing, it also seems to be a buyer's market for employers. Those who are hiring can be extremely selective in whom they choose. That's why smart project managers plan today for tomorrow's "what if." We need to be smart about managing our own career "risks" and have a mitigation plan firmly in place now. There are three simple, cheap, and super smart things you can start doing now to avoid any unneeded worry and panic if you do, in fact, find yourself looking for other career opportunities.

**1. Invest in yourself.** First, make time to invest in yourself. No more excuses! If you do not currently have your PMP® certification, now is the time. You don't have to spend a lot of money. A PMP exam prep course can range from about \$800 (for a PMI® chapter sponsored course) upwards of \$3,000. All told, your total required investment is small compared to the rewards (significantly better pay and more visibility as a job candidate). Further, if your current company pays for training, you really have no excuse; that's a benefit you can't afford to pass up. Nothing in life is guaranteed, and that includes the job you have today. Take the time to invest in your career now, so you do not end up having to scramble if things take a turn for the worse.

If you already have PMP certification, look into some advanced training that is complementary to project management. There are a number of topics that employers are looking for (i.e. Six Sigma, ITIL, CMMI, etc.). There is a strong emphasis on "doing more with less" these days, and employers are looking for people who can help improve how they run as a business. Broaden your skills, and differentiate yourself by being a project manager who understands the world outside of just managing projects.

**2. Create a buzz.** Now is the time to start making a name for yourself! Start a course of action to position yourself as an expert in your field. One way to create a buzz is to write articles on what you know. You can do this a number of ways. First, try submitting articles to your local chapter of PMI or another local professional organization. Groups like this are always looking for new content and will often be more than happy to publish your work in a newsletter or online.

Another way to get your ideas out there is to start a blog, WordPress, for example, offers free blogs that take only a few minutes to set up. You can write as often or as little as you like. Write about whatever you are passionate about, and you may be surprised at how many readers you end up with!

If you're feeling adventurous, book a speaking engagement or two! This will provide you with credibility in your industry, and you will undoubtedly become a better speaker as a result. Plus, it's a great way to meet influential people in your industry.

Demonstrating your communication skills, both written and verbal, is a good way to make you a better project manager and get the word out that you are an expert in your field. Start building your reputation by putting your thoughts and ideas out there.

**3. Make a difference.** If you are busy making a positive difference in this world, you will be rewarded. Volunteer your time! If you are not doing so already, get involved as a volunteer with your local PMI chapter, or work with another non-profit organization in your area. By giving of your time and talents, you will likely find you get tremendous satisfaction in mentoring others around you. You will also strengthen your own skills and maybe even pick up a few new ones. It's also another great way to meet good people in your area. I personally know a lot of people who have found wonderful new jobs as a result of becoming a volunteer. Make a difference in the lives of others, and your life will positively benefit as well.

Let your new year's resolution be to take an interest in these three areas, and you will undoubtedly have an amazing 2009, both personally and professionally, regardless of the ups and downs of our economy.

**Erika Flora, PMP, ITSM**  
Creative Enterprise Solutions

# PMI-OC ORIENTATION (MVOT)

The last PMI-OC Orientation meeting was held in November at the UCI Learning Center in Orange, near "The Block" shopping center.

The traffic that day was pretty bad. We had a couple of volunteers who barely made it in time for the event. Considering the traffic situation, we still had 26 attendees, which was a very good turnout.

The event started with a delicious meal from Baja Fresh; thanks to **Joe Paradiso, PMP** for bringing in the food and drinks. While attendees were enjoying the meal, they had a chance to get to know each other, as well as some of the board members.

The primary speaker for the event was **Thomas Cutting, PMP**, our membership director. Thomas presented an overview of the purpose of this event and the PMI-OC. Thomas 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.

**Elsie Mustaller**, our new ambassador lead, spoke about the ambassadors' roles in the chapter and how this volunteer position is a great starting place for new volunteers. **Beth Williams, PMP**, our volunteer coordinator, talked about all the volunteer positions we have within the chapter.

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. Attendees took advantage of Melanie's recruiting background and experience and asked many job searching related questions. After all, in the current economy and job market, it's always a good idea to be prepared and equipped to land a future job

The next event will be conducted on February 18 at 6:00 p.m. Food and soft drinks will be served, and parking is free. The event location, the UCI Learning Center in Orange, is easy to find by following the directions on the PMI-OC website, or using the link in the column at the 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](http://www.pmi-oc.org). See you at the February PMI-OC Orientation.

**Grace Wu, PMP**  
Membership Committee Chair

## February 18, 2009

### 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, February 18, 2009**

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**

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

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

#### Questions:

[membership@pmi-oc.org](mailto:membership@pmi-oc.org)



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# WANT TO BE PMP® CERTIFIED?

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

## PMI Orange County Chapter Announces Its 2009 Winter Course



## PMP EXAM PREPARATION WORKSHOP

**Six Saturdays Beginning January 31, 2009**

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

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

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

January 31	February 21	March 7
February 7	February 28	March 14

**Where:** Brea

**Brea Civic Center**  
1 Civic Center Circle  
Birch St. & Randolph Ave.  
Brea, CA 92821

Costa Mesa

**University of Phoenix**  
South Coast Learning Ctr.  
150 Bristol Street  
Costa Mesa, CA 92626



**Cost:** The workshop fee is per participant, payable at the time of registration. Classes fill very fast, so get your registration and money in early to guarantee a seat. **The exam will change in June when the fourth edition of the PMBOK® is available. So sign up for the first class and be prepared! Make your plans to attend these classes, and be on your way to getting your PMP.**

- PMI Member: \$750, walk-ins \$800
- Non Member: \$800, walk-ins \$850

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

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

**Special Offer for Referrals!** Refer a friend to PMI-OC's PMP Exam Prep Workshops and receive either a free dinner meeting or advanced topic seminar registration. That's a cost savings of up to \$45 and as many as four PDUs.

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

# ADVANCED TOPIC SEMINAR

SATURDAY, JANUARY 10, 2009

## The Transpersonal Dimension in Organizations

Leveraging the Human BEING Dimension of Successful Professionals

Presented by Elizabeth Topp, PhD

Dr. Topp will explore transpersonal practices that enhance the day-to-day effectiveness and efficiency of successful professionals, such as project managers. She will address the “being” side of the human being equation and experiment with new practices that promote the unfolding of human potential in the project management workplace. Whether the human being is the manager or the person being managed, this seminar presents methods for building capacities in individuals to enhance the ability to attain goals and meet deadlines with less stress and more efficiency.

With interactive exercises and group work, Dr. Topp will introduce the Presence-Based Strategy of capacity and skill development. This strategy posits that the higher our “level of presence” or “quality of relating to the present moment,” the more effective and efficient we become. The Presence-Based Strategy allows us to stop and see some of our learned patterns of perceiving and behaving that we typically apply to all situations, whether helpful or not. This strategy helps us see ourselves, others, and situations more clearly and thus respond more appropriately (and creatively) to each new situation that arises.

As frequent task masters, project managers tend to underestimate the significance of their leadership presence on the people and projects they manage. Dr. Topp will share findings from her research and practices in psychology that enhance leaders’ ability to work with less stress and more effectiveness, effortlessness, and joy. Attendees are encouraged to come to this workshop with actual team members whenever possible.



**Dr. Elizabeth Topp** is the founder of Topp Coaching and Consulting and has 16 years of experience working with individuals and organizations on professional development and transformation in the fields of professional coaching, wellness consulting, and cross-cultural training for global executives.

Her work is informed by systems thinking and a holistic approach to peak performance including both traditional and non-traditional disciplines,

Dr. Topp holds a PhD. In transpersonal psychology, master’s degrees in counseling psychology and cross-cultural psychology, and has a bachelor’s degree in business administration.

**Where:** DeVry University, Keller Graduate School of Management

880 Kilroy Airport Way, Room 227  
Long Beach, CA 90806


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

**When:** Saturday, January 10th, 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](http://www.pmi-oc.org)


## Coming Events

 **January 10: ATS**


**Dr. Elizabeth Topp**  
The Transpersonal Dimension in Organizations,  
See column at left.

 **January 9: Dinner Meeting**

**Chris Covey, PMP**  
Southwest Account Manager  
UMT Consulting  
“Portfolio Management”  
See pages 1 and 24.

 **January 27: 2009 PMI-OC POY**

**Deadline for Nominations**  
See page 8.

 **January 31: PMP® Exam Prep**


**PMP Exam Prep Workshops Begin**  
See page 22.

 **February 7: ATS**

Speaker and topic to be announced

 **February 10: Dinner Meeting**

Speaker and topic to be announced

 **February 18: PMI-OC Orientation**

Formerly MVOT  
See page 21.

*Coming events may be subject to change.*



## PMI Orange County MILESTONES

January 2009, Volume 21, Number 1

**MILESTONES** is published monthly for the members of the Orange County Chapter of the Project Management Institute for the purpose of notifying members of meetings, chapter activities, member accomplishments, and to provide information regarding project management in local business and government agencies. Advertising is welcome. However, its publication does not constitute endorsement by the chapter or the Project Management Institute. Copyright 2008 PMI-OC, Inc.

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Go to: [www.pmi.org/authentication?s=fale&r=www.pmi.org/Pages/default.aspx](http://www.pmi.org/authentication?s=fale&r=www.pmi.org/Pages/default.aspx) to check your membership information, mailing and e-mail addresses.

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

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# PMI-OC Dinner Meeting

## Tuesday, January 13, 2009

Program: **Portfolio Management**  
Chris Covey, 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**

<i>In Advance:</i>		<i>At the Door:*</i>	
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)

<i>In Advance:</i>	\$15.00	<i>At the Door :</i>	\$15.00
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Parking: **FREE!**

Please register at [www.pmi-oc.org](http://www.pmi-oc.org). You can pay by credit or bank card in advance or by cash, check, or credit card (Visa, MasterCard, American Express) at the door.

Make your reservation by 10:00 p.m. on Sunday, January 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](http://www.pmi-oc.org). Anyone who cancels their reservation after 10:00 p.m. on Sunday, January 11, or anyone who makes a reservation and does not attend, will not receive any refunds.



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