

# Milestones

August 2009

Monthly Publication of The Project Management Institute, Orange County Chapter, Inc.

## August 11 Dinner Meeting



As an information technology project manager for Behr Process Corporation, **Virginia Sanchez** manages projects ranging from infrastructure to customer care.

During the two year long website redesign and reconstruction, Virginia managed not only the progress of the project, but also managed budgets, tracked vendor hours, evaluated changes, and watched the website “go live.”

Virginia’s background includes over 16 years in IT. As a project leader, she manages all aspects of both small and large projects. Besides holding PMP® certification, Virginia recently became a Certified ScrumMaster (CSM).

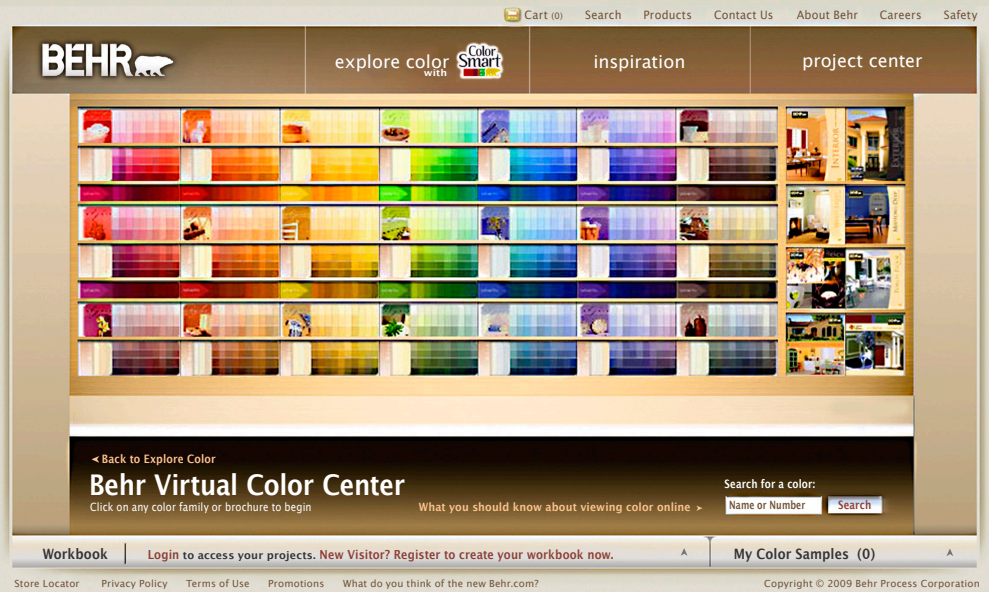
From 5:15 to 6:00 p.m., **Techni-source** will offer free resume reviews to members in transition. Please arrive early for a good spot in line.

Each dinner meeting attendee will receive a printed copy of August Milestones.

## 2009 PMI-OC PROJECT OF THE YEAR Behr Website Redesign

PMI-OC has chosen Behr Process Corporation’s website redesign, named Project Trinity, as the chapter’s 2009 Project of the Year.

**Behr Process Corporation** is the largest producer of premium paints and stains in the North American home improvement market, but the company’s website had not changed since 2003. The Project Trinity team, led by **Virginia Sanchez, PMP, CSM**, met the challenge with over 40 full time team members who learned two new technologies and successfully integrated them while ensuring that the existing website tools remained functional.



Though Project Trinity began with a “waterfall” approach, it quickly became apparent that an “agile” methodology was more beneficial. Requirements and design could be completed an iteration at a time, allowing Behr and the Project Trinity team to evaluate the readiness of the website for launch at the end of each iteration.

Join us on August 11 as Virginia Sanchez discusses Project Trinity and shares the story behind the project. [Click here](#) to view the results.

August Dinner Sponsor  
**John Stenbeck’s PM8020.com**  
See ad on page 15.

## 2009 CHAPTER BOARD

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## THE CHAIR'S COLUMN

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I am pleased to announce that we will have **Vince Lombardi, Jr.**, an executive with the Seattle Seahawks, as our dinner speaker at our 20th anniversary gala celebration at the Irvine Marriott on September 10th (see page 12). We will also hear from **Beth Partleton**, a member of the PMI® Global Board of Directors. Come and join us as we honor our Orange County heritage and our past presidents.

On July 1st, we formally announced the submission of our revised bylaws to you, the PMI-OC members, for your ratification. We provided you with the bylaws and an organization chart indicating that we are renaming the board. The PMI-OC Board of Directors will change to the PMI-OC Board of Governors.

We pointed out that we were taking the membership director, marketing director, and IT director to the tactical level. We are removing the position of chair-elect completely. We will have new vice presidents of operations, finance, communication, strategic planning, and administration, along with a president. The immediate past president will also serve as an ex-officio member, an advisory role without a vote.

Our current plan is to begin voting on these revised bylaws on August 15th, which will be the 45th day after our notification to the membership, as required by the existing bylaws. We will require that 66 percent of the members voting ratify these changes. Once we have the results of the voting, we will be able to proceed with our 2010 board nominations. Our nominating committee is going to be challenged to have two slates ready, one with the old board and the second with the new board, and, depending on the results of the ratification vote, we will move forward with the election.

One factor that we are looking for in the proposed, and to be ratified, new election format is the election of five board members in the first year and replacement of three members every year after that. We are electing five members this first time because we are considering the previous election of **Stephen June** as the chair-elect to be binding. We are looking for as many qualified candidates as possible, not just five names. The candidate qualifications will be reviewed by the nominating committee named by the chair/president and will act independently to meet the needs of the chapter.

That brings me to an important point. We are going to need a new type of leader in the chapter, one who has executive experience and the skills necessary to work at a higher, or strategic, level than we have had before. We are also going to need a different level of participation among the second tier leaders who will be more focused on the day-to-day tasks of running the chapter. Our current structure calls for individuals who are both strategic and tactical, which has become very difficult to combine.

The expectation of the job and the scope of work to be done has overwhelmed many board members in the recent past. A key factor in the revised bylaws is the change in expectations of the board members. No longer will they be expected to provide hands-on management, rather they are going to provide the oversight to the second tier and ensure that effective communication occurs on numerous levels. For this reason, we are going to target our members who have senior management positions in their companies as the governors in the future.

We are going to utilize PMI-OC volunteers with director and C-level leadership experience as we move the chapter forward. If you are a director or a C-level executive who would like to fill one of our positions on the board of governors, please drop me an e-mail at chair@pmi-oc.org. And don't be surprised if our nominating committee calls to ask if you're interested.

**Sylvan Finestone, PMP**  
Chair/President

# Why Project Leaders

# Fail

## What makes the difference between success and failure?

The featured guest speaker for the July dinner meeting was **Thomas Sek**, the regional director of Successful Strategies International Inc (SSI). Tom's presentation focused on the soft skills of project leadership that make the difference between success and failure.



**Using a unique interactive style, Tom Sek pleasantly surprised the audience by encouraging everyone to participate in a series of rousing exercises that left them feeling energized and enthusiastic.**

Tom began his presentation by talking about the definition of leadership. He asked the question, "What are those important, yet intangible, ingredients that each project leader needs to have?"

Well, according to the work of John Kotter, it comes down to three essential things:

**First**, the leader needs to develop the vision and strategy for the project. The leader needs to have the vision for the final outcome of the project, and then he (or she) needs to define the strategy and the path that the team will follow to achieve that vision.

**Second**, the leader needs to have the alignment and support of confident and competent people who will follow his strategy.

**Third**, the leader needs to empower his people to take the action needed to make that vision become a reality.

According to John Kotter, these three points are absolutely critical. However, Tom added a **fourth** key point to this list: communication. In fact, all PMI® members should be familiar with this point

from the PMBOK®. Simply stated, "The project leader must be a good communicator." It is not enough to have the vision and the strategy, but he (or she) must also be able to communicate it to the people on his team and to the stakeholders on his project.

Tom's presentation then moved on to discuss the main causes of failure in project leadership. He cited findings from a recent survey that listed the top five causes of failure. They are:

1. Poor interpersonal skills: 58 percent
2. Self centeredness (placing self before team/project): 56 percent
3. Failure to acknowledge problems: 55 percent
4. Untrustworthiness (team doesn't trust them): 54 percent
5. Weak management skills: 52 percent

Other important factors that contribute to project failure include poor listening skills, no open door policy, and the inability to inspire or motivate the staff or team.

Please note that all of these additional factors are indicative of communication problems. This just reemphasizes the material from the PMBOK, which ranks communication as the most important skill that a successful project manager must have.

For the next part of his presentation, Tom asked the audience to take a quick, informal table by table survey of its members about the personality characteristics that are found in the best leaders. He then summarized the results and used them to introduce the characteristics that Peter Drucker described as the "right mindset" for leadership

According to Drucker, the right mindset for leadership, what he also calls the leadership paradigm, is formed by the leader out of his own values, behaviors, attitudes, and assumptions. However, the leader can only become aware of these values, behaviors and attitudes after he "knows thyself."

According to Tom, in ancient Greece, leaders would seek wisdom by visiting the Oracle of Delphi. Above the entrance to the temple of the oracle, the phrase, "know thyself." was inscribed into the stone. Like these words from the Oracle of Delphi, Peter Drucker believed that only by "knowing thyself" could a leader find the gateway to true wisdom.

An important part of the process of getting to "know thyself" includes understanding how you think, and even how you **speak**. This is important because words have power. *Continued on page 4*

## July 14 Dinner Meeting Review

Continued from page 3

With the help of some volunteers from the audience, Tom demonstrated that positive words have a positive affect on the body, and negative words have a negative affect on the body. He even offered some dramatic examples of how words can affect your outlook, and even the strength of your body.



Then, in a simple, but dramatic example (reminiscent of Tony Robbins or a stage hypnotist), Tom asked the audience to stand up and say in unison, "I am a champion," over and over again, with emphasis and force. The result was that by the time we were all finished chanting, we were energized and actually felt "fired up!!!"

Tom then closed his talk by reminding the audience that one of the most important tasks for a successful leader is to inspire and motivate his team, and as he just demonstrated with his own audience several minutes earlier, this is easy to do when you harness the power of the right words.

Yes, Tom, with the right words, we can all feel like champions.

**Bill Georges, PMP**

## Volunteer Opportunities

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

#### IT Volunteers

Design web pages, including graphics, animation, and functionality. Ensure consistency 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 support. Manage e-mail and address books.

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

#### Milestones Contributors

Write reviews of attended chapter events for *Milestones*. Clear and concise writing styles are required.

#### Milestones Photographers

Need talented and creative individuals to take photos at chapter events for *Milestones*.

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

#### Volunteer Recognition Lead

The membership team is looking for a charismatic and professional individual to work closely with the volunteer coordinator. You will be responsible for leading the volunteer recognition activities on behalf of the chapter. This involves working with the chapter leadership in the coordination and execution of volunteer awards and events, such as Volunteer of the Month, Volunteer of the Year, special awards, appreciation events, and membership meetings.

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

#### PMP® Prep Workshops: Student Liaison

Act as intermediary between PMP workshop students and the certification program. Answer questions about PMP sign-up, classes, exam registration, test center information, etc. Motivate students, keep records of who has passed the exam, keep contact lists, update student contact information, keep class roster. Must be able to attend the scheduled workshops. Time commitment is five to ten hours per week during the six weeks of the workshop, five hours or less during the three weeks before and after the class. Starting time August 2009.

#### PMP Prep Workshops: Documents Coordinator

Develop and maintain all documents pertaining to the certification program, including e-mail communications to students, instructors, and the marketing team. Maintain PMP workshop schedule and calendar. Maintain document archive. Responsible for agendas and minutes from the weekly status meetings. Time commitment is five hours per week. Start immediately.

## New PMPs

Raju Bellamkonda  
Patrick Benn  
Edward Bohn  
Brodie Brickey  
Tim Bryan-Montanez  
Kevin Cole  
Marc Crudgington  
Scott Dunn  
Ahmad Elahi  
Robert Fisher  
John George  
Rodrigo Giraldo  
Ketankumar Gohil  
Susan Gray  
Gregory Hill  
Don Hitchcock  
Mary Hoover  
David Jones  
Sunanda Joshi  
George Ker  
Dung Lam  
Maitrang Le  
David Lee  
Angela Lindstrom  
Brenda Love-Ruiz  
Allan Man  
Becky Mandich  
Gerald Parham  
Vinay Patel  
Srinivas Rani  
Mary Romo  
Janice Rooths  
Armando Ruiz  
Denise Schoeneich  
Chad Shahin  
Ibrahim Siddiqui  
Nanette Singer  
Michael Smith  
Talbot Smith  
Bahram Soroosh  
Bryan Thomas  
Max Todorov  
Mai Tran  
Timothy Treu  
Madhava Venkata  
Bonnie Wolf  
Daniel Yap

## New Members

Nancy Aluy  
Paul Bushnell  
Richard Cooke  
Hany Elsabagh  
Joanne Foley  
Scott Friedman  
Cas Gregory  
Andrea Henney  
Lawrence Hurst  
Daniel Juan  
Corwin Karaffa  
Donald King  
Angela Lindstrom  
Juan Carlos Moreno  
Brian Peek  
Christopher Schmidt  
Chad Shahin  
Michael Tatu  
Max Todorov  
Olayemi Ubajekwe

# Member Spotlight



This month, our spotlight is on **Ann Burkle**, a long-time PMI-OC member and volunteer. Many of you may already have met Ann at one of the dinner meetings, advanced topic seminars, or PMP® certification training sessions.

Ann has been a member of PMI-OC since 2004, and a PMP since 2005. She's held a number of volunteer positions in the chapter, including *Milestones* contributor and assistant editor, statistician for the marketing team, and PMP prep class instructor.

Ann currently works at Watson, a specialty pharmaceuticals manufacturer, as manager of corporate IT. However, her role is more in line with the PMI® definition of a program manager since she leads both project and non-project activities. Ann and her team are responsible for IT systems including Kronos (time reporting), ADP (payroll), EDI (electronic data interchange) and the I-many contracts and rebates systems. Her I-many team recently completed a six month upgrade project for the I-many contracts and rebates systems, which required replacing all of the computer hardware and upgrading an application for the first time since its original implementation in 2002. Right now, that same team is working with internal auditors to complete a SOX evaluation of the upgrade.

Let's you think Ann is all work and no play, she has a number of hobbies. She currently has over 50 different varieties and colors of orchids. She agrees that orchids are "the silent addiction." She also has two large fish tanks, one fresh water and one salt water. Her "oldest" fish is a Red Sea sailfin tang she's had since 1996. As if that weren't enough, Ann also has been creating one of a kind fabric, polymer, and porcelain dolls for a number of years. Lately, she's been restoring American Girl dolls, which includes cleaning, restringing, rewiggling and, creating one of a kind outfits. She's "helped" with the doll work by her cat, Pixel.

Even with all that to keep her busy, Ann's real love has always been teaching. As mentioned earlier, she's taught a number of PMP prep classes for the chapter. She used that experience to qualify as an extension instructor at UCI as part of the project management certificate program. After submitting her application last year, she was asked to come to the campus and present a short topic to the evaluation committee. Then in late December, she was chosen to teach "Introduction to Project Management," an eight week class that started in April.

UCI has a great program for preparing new instructors, including ordering online audio visual equipment and loading all the course materials to the class website. Since this class was one of the first using the *PMBOK® Guide—Fourth Edition*, there was even a special class for differences in the material between the third and fourth editions. One of the great things about the UCI program is that the material is already prepared, so the instructor can concentrate on adding additional value with real life experiences, tools, and techniques.

A long waiting list caused an increase in enrollment; the final class roster was 39 students. The class was fun to teach, and Ann learned things from her students as well as leading them toward a fundamental understanding of project management. Ann is thrilled that she's been asked to teach again in the fall. Ann suggests that anyone who loves to teach should seriously look into becoming an extension instructor for UCI. It's a very satisfying experience and motivated her to take a hard look at the new PMBOK.

**Patty Tutor, PMP**

## PMP® EXAM QUESTIONS

Answers are on page 10.

These sample questions are based on the *PMBOK® Guide—Fourth Edition*.

1. A formal document that describes established norms and practices is an example of a \_\_\_\_\_
  - a. standard.
  - b. regulation.
  - c. preferred approach.
  - d. specification.
2. You are the project manager on a large contract. Because of a lack of expertise within your existing project team, you will need to procure a major component of the project. From a short list of qualified sellers, you ask for detailed proposals and apply specific weighing criteria. This will be accomplished during which process?
  - a. define scope
  - b. plan procurements
  - c. conduct procurements
  - d. administer procurements
3. The process which uses earned value management to aid in understanding variances in performance is called:
  - a. control scope.
  - b. control costs
  - c. monitor and control risks
  - d. administer procurements
4. As the project manager of a major aerospace vendor, you regularly attend and present project performance reviews with senior management. Topics typically discussed include all of the following EXCEPT:
  - a. forecast of project estimates at completion.
  - b. team performance achievements.
  - c. individual team member improvement plans.
  - d. risks affecting team performance.

*Sample exam questions and answers submitted by:*

**Diane Altwies, PMP**

*Core Performance Concepts, Inc.*

**[www.coreperformanceconcepts.com](http://www.coreperformanceconcepts.com)**

# HIRE Me

## Need a job?

**YOU HAVE TO HAVE EXPERIENCE.**

## Need experience?

**YOU HAVE TO HAVE A JOB.**

It's a vicious cycle that makes finding your first job a not-so-easy task. There are steps you can take, however, to make securing a position a little easier:

### 1. Build contacts on the inside.

Research where you want to work—and who works there.

“If there is a company you want to work with, build that relationship before the position is even posted. The best companies are always looking for good people, even if they don't have openings,” says PM Network® Career Portfolio columnist John Sullivan, PMP.

Abad Kelawala, PMP, says, “Not only can your source alert you to possible openings, but they can also fill you in on what your would-be employer is looking for. It is also critical to understand what the prospective employer is looking for in terms of the project manager and how the employer defines the role for the project manager.”

To help get that initial contact, Mr. Kelawala, a Columbus, Ohio, USA-based consultant at Information Control Corp., suggests contacting the company's human resources department.

### 2. Expand your network—beyond online.

Although sites like LinkedIn can be a tremendous resource for networking, nothing beats building those bonds face-to-face.

“Get out from behind your computer. You need to meet people, and you need to do something for them,” says Mr. Sullivan who also works as an IT project manager in Dayton, Ohio, USA. He suggests volunteering to meet people with similar passions. “The paradox is your first motivation has to be serving others. Secondary is the networking,” adds Mr. Sullivan.

“Join PMI, get along to conferences and project management events. Meet people in the real world as well as the online communities,” says John Cornish, PMP, managing director, Micro Planning International Ltd., Wimborne, Dorset, England.

### 3. Give job fairs a chance.

They are great places to build relationships and get information. Network and meet some of your competition and find opportunities in different disciplines, says Ronald B. Cagle, senior partner, Arjay Enterprises LLC, Viera, Florida, USA. It could lead you to could find interesting people outside your normal circle.

“You never know what's going to happen at a job fair,” he says. “In today's job market one must at least look at all opportunities available.”

And go in armed with a sufficient supply of resumes.

### 4. Be interview-ready.

Getting an interview is only half the battle. Once you are finally face-to-face with a possible employer, you have to be prepared.

“You never have a second chance to make a first impression. Present yourself confidently and professionally at the first meeting. Do your homework and preparation thoroughly. Know your subject well and yourself just as well,” says Mr. Cagle, author of *Your Successful Project Management Career*.

Be sure to research the interviewer and the company and to be ready for whatever questions may come up.

Mr. Kelawala warns that scenario-based questions are often used in interviews. “Be aware of these questions and have your answers prepared in advance for these roles,” he says. And whatever you do, show control with your knowledge and body language. Don't fidget—it can signal you are unsure of what you are talking about.

Mr. Cagle says, “Control is the mantra of project management, so it is essential that a project manager have a solid knowledge of the subject at hand and that he [or] she show confidence, not smugness, in the presentation of answers to all the questions.”

So, go inside, outside and online—and be interview-ready. Use all four approaches to help land that elusive first job.

Take advantage of all the ways that PMI can help you to **start, build or advance your career.**

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This article was published originally on [www.PMI.org](http://www.PMI.org), the official website of Project Management Institute, Inc.

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# AT THE JULY MEETING



Below left:  
Craig Wilson, PMP and Dávid Johnson, PMP discuss project management issues before dinner.

Below center:  
Donna Galetti and Peggy Baggott from PCI/Metier Resources, the July dinner meeting sponsor, announce the raffle winner of a state-of-the-art camcorder.

Below right:  
The lucky winner, Rosie Coleman, PMP, proudly displays her new camcorder.



- Right: New PMPs  
 Patricia Alexander  
 Tim Bryan-Montanez  
 Kevin Cole  
 Marc Crudgington  
 David Fauls  
 Mark Fox  
 Rey Genaldo  
 John George  
 Susan Gray  
 Don Hitchcock  
 Youngmi Kim  
 Carolyne Lee  
 Chad Shahin  
 Nanette C. Singer  
 Talbot Smith  
 Yasser Soliman  
 Dinesh Srirangpatna  
 Timothy Treu  
 Qiong Xu



Photos by Francisco Avalos, Diane Wei, and Qiong Xu

[Register Now](#)

# August 19, 2009

## PMI-OC Orientation Meeting

### 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 Meeting**.

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, August 19, 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

[Click here for map.](#)

#### Cost:

None. **Parking is FREE.**

After 6:00 p.m., you can park in any non-handicap space. Check in with the guard.

#### Register:

Please register early.  
Space is limited.

[Click here to register.](#)

#### Questions:

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

## JUNE PMI-OC ORIENTATION REVIEW

The **June 17, 2009 PMI-OC Orientation Meeting** was held at the UCI Learning Center in Orange near “The Block” shopping center. The next meeting will be conducted on Wednesday, August 19th, 2009, beginning at 6:00 p.m. Food and soft drinks will be served, and parking is free. See column at the left.

The event location is easy to find by following the directions on the PMI-OC website and/or accessing the map link in the column at the left. You can park anywhere in front of the building. Thanks to **Joe Paradiso** and **Grace Wu** for coordinating this event!

Over 80 people registered, and 35 attended. **Thomas Cutting**, our membership director, welcomed everyone to the meeting and was our primary speaker. Thomas introduced the board and volunteer members in attendance: Marketing Director **Lori Shapiro**, Operations Director **Nora Goto**, Volunteer Coordinator **Beth Williams**, Volunteer Coordinators **Joe Paradiso** and **Grace Wu**, and **Anita Arvizu**, as well as membership committee volunteers and **Diane Altwies**, our networking expert and speaker.

Thomas discussed the purpose of PMI-OC: to provide members quality professional development and networking opportunities. Thomas explained our Orange County chapter, the board of directors, their roles and responsibilities, and the importance and great benefits of volunteering for the chapter. He explained how to become a volunteer, the current opportunities, and why this organization depends on volunteer involvement to run as well as it does.

Lori Shapiro, our marketing director, also shared very helpful information and explained the upcoming Septemberr PMP® prep courses and reviewed our great chapter publication, *Milestones*. Lori also sends out our weekly PMI-OC *eNewsletter*.

Diane Altwies, CEO of Core Performance Concepts Inc., conducted a terrific “Networking 101” session. Diane has been a member of the Orange County chapter since 2001 and has served as a board member and in many volunteer positions. Her tips were a highlight of the evening, and we know everyone received very valuable information about networking.

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

To register for the PMI-OC Orientation Meeting, learn more about other events, and to receive the PMI-OC *eNewsletter*, please visit [www.pmi-oc.org](http://www.pmi-oc.org). See you at the August 19 PMI-OC Orientation Meeting.

**Anita Arvizu**  
Membership Committee





# Business Analysis Essentials for PMs

Presented by **Diane Altwies, PMP**



**In a hot Saturday morning over 50 people attended Diane Altwies' advanced topic seminar, Business Analysis Essentials for PMs. But there was one person who was not invited: Mr. Scope Creep.**

The seminar included a lively and interactive session that featured many exercises and spirited discussions. The primary goals of the session were to describe the value of the business analyst (BA) to a successful project and the importance of well written business requirements. "Our objective is to look at the role of the BA in terms of managing project requirements and charter," Diane said.

Diane emphasized the importance of the BA. "The business analyst is a key person in a successful project. A good business analyst makes everyone's job easier. The better the analyst, the better the project." If the analyst documents the project charter clearly, then the odds of scope creep (or "Mr. Scope Creep," as Diane joked) are greatly diminished.

Diane outlined the differences between the BA's and project manager's roles. The business analyst defines the business and system processes and reviews the processes to determine the value to the organization. The BA must also measure the financial value of the current vs. proposed solutions. A good BA must define the process, understand the goals, research alternatives, and recom-

mend solutions. A business analyst's work is a mixture of art and science.

Often, there is confusion in the organization about the business analyst vs. the project manager, according to Diane. In short, the business analyst understands the business; the project manager accomplishes the project tasks.

Diane described the governing body for business analysts, the International Institute of Business Analysts (IIBA). The IIBA uses a guiding document similar to the PMBOK®. Further information can be obtained from the IIBA website, [www.theiiba.org/am](http://www.theiiba.org/am).

For one exercise, the audience was separated into groups and asked to analyze three business problems and determine if they are simple or complex decisions. After gathering the feedback, Diane emphasized that all business problems are both simple and complex. The analyst's role is to understand what the project is really trying to accomplish and then evaluate the organization goals and how the project can support the goals.

*Continued on page 10*



The group was given a case study of a hypothetical business, “DJ’s Time for Wine.” DJ’s was evaluating a project to increase revenue in a complex and conflicting business environment. Attendees broke into small groups and compared the project goals to the goals of the organization. The ensuing discussion emphasized that the project goals should align with the organization goals. However, every project can’t meet every organizational goal.

Successful projects must be focused and supported by the project charter. The charter must be simple and must clearly define the project scope. Without clear focus, scope creep can occur and bog down and degrade the project. Diane showed a sample project charter that was simple, straightforward, and effective. “The technical teams love to receive clear and well documented business requirements. It makes their jobs a lot easier.”

Diane commented, “Requirements errors account for 75 to 85 percent of software project work costs. U.S. business people are not good at writing requirements.” Diane explained that domestic businesses often use meetings to define requirements, while other countries are stricter toward documentation.

Next, the attendees worked in teams to define a requirement vs. a specification. Each group was given a list and asked to classify each item. After the exercise, Diane defined a requirement as the outcome of the project that the business desires. It is primarily focused on the business needs, is authored by the business, and does not explain how the objectives will be fulfilled.

Developers create specifications for meeting the requirements. The developers propose one or multiple solutions that directly support the requirements to be achieved. The group also discussed the importance of tracing requirements back to the project objectives.

Diane reemphasized a good business analyst’s role in a successful project. An analyst will ensure that the link exists between requirements and specifications and also ensure that solutions are vetted before a project can begin. “The task of a good BA is to put it in writing.”

The business analyst provides a sanity check to see if the project is meeting the requirements. Business analysts define the scope, catch errors early, solve the right problems, and help the project team do it right the first time. But once again, Mr. Scope Creep can haunt a project if the stakeholders push it in the direction of fulfilling what the executives want vs. what they need. The BA fights the good battle to ensure the project stays on track and Mr. Scope Creep never appears.



**Diane Altwies, PMP**, is CEO of Core Performance Concepts, Inc. and has over 20 years of experience in software development project management and over 15 years of experience in the insurance, financial services, and health care industries.

Diane’s background also includes a broad range of experience as project manager, program manager, and vice president of marketing. She continues to consult with organizations to improve overall business processes. Diane has an MBA in finance and a BA in production management from the University of South Florida.

**Ron Puksza, PMP**

## ANSWERS TO PMP® EXAM QUESTIONS

From page 5.

**1. a. A standard**

Framework  
Chapter 1

Choice “b,” a regulation, is a requirement imposed by a governing body. Choice “c,” a preferred approach, is similar to a best practice. Choice “d,” a specification, is a document that specifies how a deliverable will be measured for completeness.

**2. c. Conduct procurements**

Executing  
Chapter 12, Section 12.2.1

**3. b. Control costs**

Monitoring and Controlling  
Chapter 7, Section 7.3

Earned value management (EVM) measures project performance in terms of dollars.

**4. c. Individual team member improvement plans**

Executing  
Chapter 9, Section 9.4.2

Project performance appraisals address individual team member needs for improving performance and will most likely not be part of a formal project review with senior management. They may, however, be addressed indirectly within the risks presented.



# Meet Julie Wilson

**JULIE WILSON, PMP, PMI-OC Fellow, PMI Fellow**, and one of PMI-OC's founders, became involved with the Project Management Institute in the mid 1980s, when she was engaged to redesign the product development process for Pacific Mutual Life (now Pacific Life). An outside organization focused on key elements of this project, while program and portfolio management assisted in validating what was to become a fully integrated, cross-functional organization. This organization concentrated on expanding the company's product portfolios for its growing customer base and its market segments.

Julie was one of the members who attended the Los Angeles PMI® chapter meetings before our Orange County chapter was formed. She met and networked with other PMI members and leaders and worked to adapt PMI industry practices and the PMI body of knowledge contained in the PMBOK® into what was needed for the insurance industry.

The insurance industry was under-represented within PMI at the time, and Julie seized the opportunity to raise its visibility along with that of other related industries and cross-industry communities in which some type of project management was in practice.

According to Julie, when she first became involved, PMI consisted of about 6,000 to 9,000 members, mostly engineers, in the United States and Canada. PMI has expanded dramatically since then and includes professionals at various levels of project-oriented industries, such as construction, pharmaceutical, financial services, communications, manufacturing, and technology, as well as cross-functional areas within information technology, accounting, or marketing organizations.

PMI has also grown throughout the world as project management has become recognized as a critical need, in addition to traditional management, in changing business environments and related global landscapes.

Julie believes that key benefits of PMI membership are the widespread application and evolution of the project management body of knowledge (PMBOK) in all forms of business and related communities and the constant evolution and continuous growth of thriving and changing landscapes.

Additionally, says Julie, the power of networking with peers and industry experts across the globe through PMI is unsurpassed. She believes that the continued emphasis on state of the art information, coupled with the active involvement of membership

leadership, are key to continuing to grow and advocate global knowledge and application of skills in the organization's future.

Formal recognition of project management as a profession, through additional credentials and licensing, are also vital to PMI in the future.

Julie Wilson has been recognized for her sustained and significant contributions to PMI-OC, PMI, and the profession of project management. Julie was named a PMI-OC Fellow in 2006, and at the 2007 PMI Global Congress in Atlanta, she was honored with the title, PMI Fellow. She is one of only 50 individuals to be inducted into this august group.

Although Julie retired her PMI membership last year, she remains an active advisor and mentor to those seeking assistance within various industries and project management-related roles, from executives to entry-level professionals. Julie also retired recently from IBM, but she has found that her involvement with PMI continues to reveal opportunities for her today.

Through the emergence of project management and its application in non-traditional areas of general management principles and practices in government, business, academia, and related communities, PMI has supported Julie throughout her career. Her contributions to PMI over two decades helped shape the organization, our Orange County chapter, and the industries benefitted by PMI knowledge and applications.

None of these would have been the same without her.

**Vinita Jha**



**PMI-OC CELEBRATES 20 YEARS • September 10, 2009, Irvine Marriott**

# 20th Anniversary Gala Celebration

## Fourth Annual Career Fair

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Don't miss the 30 minute career related breakout sessions designed to assist job seekers, and earn up to 1.5 PDUs, which means the entire event is worth 2.5 PDUs.

**Date:** September 10, 2009

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

**Time:** 3:00-9:30 p.m.

**Schedule:**

3:00-6:00 **Career Fair**

3:30-5:30 Breakout Sessions:

**Don Martinez**, The Domar Group  
*Principles of a Career Search*

**Steve Averill**, Waxpoetix  
*Using Social Media to Advance Your Job Search*

**Jack Molisani**, ProSpring Staffing  
*Resume Secrets that Might Surprise You*

6:00-7:00 Networking, No-Host Bar

7:00-8:15 Dinner  
**20th Anniversary Celebration**  
**Beth Partleton**, PMI® Global

8:15-9:15 Keynote Address  
**Vince Lombardi, Jr.**

9:15-9:30 Raffle and wrap-up

**Cost:** Career Fair only: \$15  
Pre-registration:  
Members \$50, non-members \$55  
At the door: \$65

Join us in celebrating PMI-OC's 20th anniversary with cocktails, a unique dinner meeting, and two very special guest speakers.

## Keynote Speaker Vince Lombardi, Jr.



Son of the legendary Vince Lombardi, one of the greatest football coaches in the history of the sport, **Vince Lombardi, Jr.** spent his early years in an atmosphere full of personal power and achievement. He has since gained outstanding success and recognition in law, politics, and sports.

Currently an author, and sought-after motivator, Vince's first-hand knowledge of his father's leadership techniques will make for a dynamic presentation, "High Performance People What Do They Do and How Do They Do It?"

**Learn what high performance people have in common, how they perceive themselves and the world around them, and how we can orchestrate high performance in ourselves and others.**



## Special Guest Beth Partleton PMI® Global Director

**Beth Partleton**, PMP, PMI Global Director, has been involved with PMI since 1991 and was honored with the PMP Distinguished Contribution Award in 1998.

In addition to her current term on the board, Beth served on the PMI Education Foundation Board of Directors for six years, serving as chair in 2006.

Click here or go to  
[www.pmi-oc.org](http://www.pmi-oc.org) to register.



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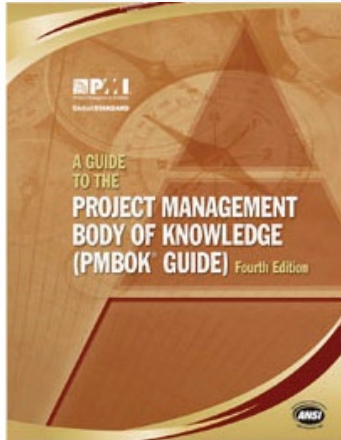
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# WANT TO BE PMP CERTIFIED?

This workshop will be the first to use the new PMBOK® Guide—Fourth Edition study materials and is intended for anyone who wishes to achieve their PMP certification, who meets the requirements as



identified by PMI® AND has studied the recommended project management literature, specifically, the PMBOK Guide—Fourth Edition.

## **SATURDAY, AUGUST 15**

University of Phoenix, Costa Mesa

Full day orientation and training event focusing on the new PMBOK® Guide—Fourth Edition.

8:00 a.m. to 12:00 noon

**Knowledge Gap**—Explore the differences between the third and fourth editions of the PMBOK.

1:00 p.m. to 5:00 p.m.

**Train the Trainer**—Learn new training techniques for the PMBOK® Guide—Fourth Edition.

This event is open to all and earns eight PDUs, but space is limited. Cost is \$20.00.

**CLICK HERE** for details and registration.

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

September 19	October 10	October 24
September 26	October 17	October 31

**Where:** Costa Mesa

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

**Click here to register.**

**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.

- **PMI-OC Member: \$750, at the door \$850**
  - **Non Member: \$850, at the door \$950**
  - **Corporate discounts are available.**
- Go to [www.pmi-oc.org](http://www.pmi-oc.org) for details.

**Click here for further information and to register.**

*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.*

# How to Upgrade Yourself to the New PMBOK

By Cornelius Fichtner, PMP

If you studied to take your PMP® exam using the *PMBOK® Guide—Third Edition* and were unable to take and pass the exam before June 30, 2009, then you are now required to take the exam based on the new *PMBOK® Guide—Fourth Edition*. PMI® will not make any exceptions.

There are notable changes between the third and fourth editions of the *PMBOK® Guide*. For instance, the number of processes has been reduced from 44 to 42.

This seems straightforward at first. But, if you look deeper into this, you will realize that the change wasn't simply that two processes have been removed. Instead, what happened is that some processes have been removed from the *Guide*, some have been combined, and several new processes have also been added. So, what looks like a simple reduction in numbers is in fact more complex than that.

Appendix A in the *PMBOK® Guide—Fourth Edition* describes the bulk of the changes. A number of authors have also described these changes and made their analyses available for free. It is, however, important to note that these descriptions don't list all the detailed changes. For instance, the inputs, tools, techniques, and outputs of many processes have changed. Some have been removed, and new ones have been added. You will not find a complete description of all the changes.

Because of this large amount of changes throughout the *PM-BOK® Guide*, it is impossible to simply “study the differences.” The changes are sometimes conceptual, sometimes dramatic, and sometimes minor. But, they are here, and, your PMP exam may require you to know them. “Upgrading” your knowledge from the third to the fourth edition can, therefore, not be done “change-by-change.” It has to be a holistic approach.

However, it must also be said that just because the *PMBOK® Guide* has changed, project management itself hasn't changed. The fundamental way in which projects are managed is still the same. The *PMBOK® Guide* is our general framework describing the activities and techniques that are commonly accepted to be good practices on most projects most of the time. Just because the *PMBOK® Guide* has changed its procurement section from six to four processes doesn't mean that procurement systems need to be changed immediately.

But in order to pass your PMP exam, you will have to be aware of the new definitions in the *PMBOK® Guide*. Studying them takes effort, dedication, and time. Here is a possible study approach to “upgrade” yourself to the *PMBOK® Guide—Fourth Edition*:

1. Read Appendix A, and familiarize yourself with the changes. In particular, familiarize yourself with the processes that have been added, removed, and combined; learn the new process names;

study Table A1 on page 350, and know which documents are part of the PM Plan and which ones are “other” project documents

2. Read Appendix F, and familiarize yourself with the summary descriptions of the nine knowledge areas and the 42 processes. At this time you may also wish to read the introductions to Chapters 4 through 12.

3. Read Appendix G, and familiarize yourself with the interpersonal skills.

5. Study Table 3-1 on page 43, and know which process belongs to which process group. It is a good idea to start with a blank piece of paper and be able to draw this table from memory.

5. And finally (and unfortunately), read the complete *PMBOK® Guide—Fourth Edition* twice.

When reading the new *PMBOK® Guide*, familiarize yourself with the new inputs, tools, techniques, and outputs of all the processes. Study Figure 3 in Chapters 4 through 12. This is the data flow diagram for each process. These diagrams illustrate the flow of the inputs and outputs and will strengthen your understanding of the flow of all the inputs and outputs. It will also help you understand the integrated nature of all the processes in the *PMBOK® Guide*.

You should also get to know the new processes that have been added and, make special note of the changes to the earned value formulas in Chapter 7.3.2

“Upgrading” your knowledge to this new version of the *PMBOK® Guide* is not something that you can do in just a day. Even though the PMP exam consists mainly of scenario-based question, it will be necessary for you to have an in-depth understanding of the *PMBOK® Guide—Fourth Edition* to be able to answer questions correctly.

Plan a minimum of two weeks of intense study.

## ■ About the Author:

**Cornelius Fichtner, PMP** is a noted PMP expert. He is the host of The PM Podcast at [www.thempodcast.com](http://www.thempodcast.com) where you can hear his free interviews with PM experts from around the world. Cornelius' PM PrepCast at [www.project-management-prepcast.com](http://www.project-management-prepcast.com) has helped over 6,000 project managers study for the PMP exams.

Cornelius is a present and past PMI-OC board member; he is currently director at large and served as chair/president in 2007.





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September 12, 2009

## The Emotionally Intelligent Project Manager

Presented by Grazyna Gasiorowska, Ed.D.

Dr. Gasiorowska will discuss types of emotional intelligence abilities and skills dominant in the professional life of experienced project managers. Two specific questions will be examined:

- What are the most dominant emotional intelligence abilities of highly experienced project managers based on their Mayer-Salovey-Caruso Emotional Intelligence Test (MSCEIT) outcomes?
- What are the most dominant emotional intelligence skills of highly experienced project managers based on their Bar-On Emotional Quotient Inventory (EQ-i) outcomes?

**Dr. Grazyna Gasiorowska** has over 20 years of experience in project management, organizational development and change, executive coaching, and professional training. She has taught numerous courses, developed college level curricula, and conducted a wide range of workshops and seminars exploring emotional intelligence.



October 3, 2009

## Monkey Management

Presented by Mike Graupner, PMP

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


**Where:** Keller Graduate School of Management  
880 Kilroy Airport Way, Room 228  
Long Beach, CA 90806

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

**When:** Saturday, September 12, 2009, 8:00 a.m. to 12:00 p.m.  
Saturday, October 3, 2009, 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

**Details and registration:** [www.pmi-oc.org](http://www.pmi-oc.org)

 **August 11 Dinner Meeting**

### PMI-OC 2009 Project of the Year

Speaker: Virginia Sanchez from Behr Process Corporation  
Topic: Website Redesign Project  
See pages 1 and 21.

[Click here to register.](#)

 **August 15**

### Special Workshop: New PMBOK

Two Sessions:  
**Knowledge Gap** and **Train the Trainer**  
See page 13.

 **August 19 PMI-OC Orientation**

See page 8.

 **Sept 10 SPECIAL EVENT**

### Fourth Annual PMI-OC Career Fair

Including Three Breakout Sessions  
**20th Anniversary Gala Celebration**

**Keynote Speaker: Vince Lomarbi, Jr.**  
**Special Guest: Beth Partleton,**  
**PMI Global Director**

At the Irvine Marriott.  
See page 12.

 **Sept 12 Advanced Topic Seminar**

### Grazyna Gasiorowska

The Emotionally Intelligent  
Project Manager  
See column at left.

 **September 19, 2009**

### PMP Prep Fall Workshops Begin

See page 13.

 **Oct 3 Advanced Topic Seminar**

### Mike Graupner, PMP

Monkey Management  
See column at left.

 **Oct 10-13 PMI Global Congress**

North America 2009, Orlando, Florida  
[Click here for details.](#)

 **Oct 16-17 Tenth Annual SoTeC**

### Southland Technology Conference

New Paradigms for Challenging Times  
At the Hilton Long Beach  
See page 19.

 **Nov 7 Advanced Topic Seminar**

**Jeremy Hart: ITIL**

 **Dec. 5 Advanced Topic Seminar**

**Brad Belmore: CMMI**

*Coming events may be subject to change.*

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# PMI-OC Dinner Meeting

## Tuesday, August 11, 2009

Program: **PMI-OC 2009 Project of the Year**  
Behr Process Corporation, Website Redesign Project  
Presentation by Virginia Sanchez

Location: **Wyndham Orange County Hotel**  
3350 Avenue of the Arts  
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Schedule: 5:15 -6:00 p.m. Free resume reviews, courtesy of **Technisource**,  
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Please register at [www.pmi-oc.org](http://www.pmi-oc.org) or [click here to register](#).

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 Monday, August 10, 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 two days before the event at [www.pmi-oc.org](http://www.pmi-oc.org). Anyone who cancels their reservation after 10:00 p.m. on Sunday, August 9, or anyone who makes a reservation and does not attend, will not receive any refunds.



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