



# Milestones

January 2010

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

## TIME MANAGEMENT UNCOVERED



**Steve Kaye** is a systems thinker who shows leaders how to be more effective. Since 1992, his workshops and presentations have informed and inspired people nationwide.

Steve brings a rare blend of skills. He is a poet with a Ph.D. in chemical engineering. He is a senior citizen with the curiosity of a four year old. He is an entrepreneur who spent 20 years working as an employee. So expect a program with fresh ideas that really work.

Steve is the author of four books on leadership topics, five collections of poetry, over 950 blogs, and numerous articles.

Learn more about Steve at [www.stevkaye.com](http://www.stevkaye.com).

### January 12, 2010 Dinner Meeting Presentation

Time management is a myth.

Working hard, being efficient, and multi-tasking are meaningless. Some of these tactics will even make you less effective and cause problems that waste your time.

**Steve Kaye** will show you something else: an approach to life mastery. Now, you can build a life that gives you more control over your time. As a result, you'll have more of what you want. Steve will begin with popular myths about time. Then he'll show you practical tools that fit your way of living so that you can create a masterpiece of successful living.

This is a powerful, thought provoking program. Bring friends.

**Click here to register.**

Dinner meeting sponsor is **BigVisible Solutions**. See ad on page 16.

Free resume reviews 5:15 - 6:00 p.m, courtesy of **Technisource**. See page 21.

## 2009 Board of Directors

**Sylvan Finestone, PMP**  
Chair/President

**Stephen June, PMP**  
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Operations Director

**Derek Barraza, PMP**  
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## 2010 Board of Governors

**Stephen June, PMP**  
President

**Derek Barraza, PMP**

**Nora Goto, PMP**

**Alvin Joseph, PMP**

**Richard Nalle, PMP**

**Tariq Shaikh, PMP**

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## THE CHAIR'S COLUMN

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I really never thought I would have the privilege of writing this column. When I took over the position in January 2009, there was every intention that it would be a one year term ending in December. But, as you know, we have changed our bylaws, and the transition will occur on March 31, 2010.

In any case, this is the time of year when we look back and review what we as a board have accomplished and what we are leaving for our successors. So, let's begin our review of the year.

We started the year with two major initiatives. We were evaluating the chapter governance model with the intention of developing a new model that would better support the future growth and success of the chapter. We compared our proposed structure with other PMI® Region 7 chapters that had shifted from tactical to strategic boards, and after extensive discussion, adopted the "best of breed" from similarly sized, mature chapters.

As a result, we are closely aligned to the San Francisco Bay Area, Sacramento Valley, and Phoenix governance structures. Although our advisors suggested that this was a two year effort, your board was able to complete the activity in seven months, including the time it took to obtain concurrence from PMI® Global Operations and the chapter.

Our second major initiative was not as successful. We were planning to expand our external communications. This was a two-fold effort; we were going to have a stronger corporate outreach and, at the same time, improve our relationships with other similar professional organizations. It will be an open item for the incoming board to determine if this will continue to be an area to develop.

Tactically, we had a terrific year. Our PMP® prep classes were hugely successful, offering training to over 140 students. Our ATS programs with timely and relevant topics continued to be well attended each month. *Milestones* and the *eNewsletter* were effective means of communication, and we were able to manage our messages well both internally and externally.

We celebrated our 20th anniversary in September. Our keynote speaker was Vince Lombardi, Jr., and we also had Beth Partleton from the PMI Board of Directors. In October, Beth was named vice chair of the PMI board. One of our own, Frank Parth, was elected to the PMI board as well. PMI-OC alumni Pan Kao, Glen Fujimoto, Kristine Hayes Munson, and Cindy Snyder Stackpole are also serving at the PMI Global level.

At the end of the year we were targeted by the IRS for an organizational audit. We are pleased to report that we were able to satisfy all questions, even though the effort was both exhausting and rigorous. We are expecting a clean audit letter in the very near future.

One further success was the nomination process. For the first time in memory, we had an election where the membership was offered a choice of six candidates for only five positions. All of the nominees were highly qualified, and it was unfortunate that we could not have them all on the board. We believe that we have a solid group of well grounded individuals with the experience and skills to accept the leadership challenge.

We also had a few disappointments at the board level. Our dinner meeting attendance has dropped off in the last quarter, and we are addressing that shortfall. We did not achieve the advertising goals that we had set for the chapter. However, we have to acknowledge that the performance of this board has been exceptional in meeting the challenges of volunteer leadership.

With that said, I will now move into the sunset. Stephen June and I will co-write the next two chair columns, and he will take over in April as president of the chapter. Let's all give him the same excellent support that I received over the last year.

**Sylvan Finestone, PMP**  
Chair/President

# Volunteer of the Month Atuljeet Singh Anand



When not busy with PMI-OC, Atul works for Future Computing Solutions. He is a lead network engineer in the company's professional services group. His job responsibilities include design, implementation, and management of networking, virtualization, and storage based IT projects for customers.

To round out his busy schedule, Atul has a young family to raise. "I am a proud father of two boys, ages twelve and six. I enjoy going biking on the trails with my boys." His wife works as a dentist. Atul looks forward to playing golf on the weekends, so he jokingly asks that you report any web issues on weekdays.

Congratulations and many thanks, Atul, for your valuable contributions to our chapter's outstanding website, [www.pmi-oc.org](http://www.pmi-oc.org)!

Ron Puksza, PMP

## New Members

Robert Arsenault	Mary Slykhous
Jan Banas	William Taylor
Jean Bekker	LeAnne Taylor
Jean-Claude Boursiquot	Dane Vaughn
Dale Bramlett	Raymond Wah
Roger Bruce	Tonia Williams-Osborne
Marian Buchanan	Nicholas Zimmerman

Anas Chaudry  
Sarah Costanza  
Vinnie Dessecker  
Brenda Fisher  
Audrey Florakis  
Jocelyn Freitas  
Gregory Grabowski  
Jeffrey Grubbs  
Behrouz Heshmatipour  
Jill Howard  
Robert Hupp  
Marta Kassai  
Mohsin Khan  
Prashant Kulkarni  
James Herman Loper  
Marc McCune  
Sal Mian  
Mo Nelson  
Maria Quinlan  
Larry Rose  
Eric Schmidt

## New PMPs

Jay Anderson  
Jacinto Busquets  
Gary Cohen  
Linda Davies  
Kathleen DeWitt  
Michael Downs  
Larry Macklin  
Vazi Okhandiar  
Anthony Ross  
Peter Sheckleford-Lister  
Linda Smith  
Jeremy Tiss  
Michael Valdez  
Katherine Vinson  
Kelis Weese  
Jen-Ying Wu  
Peter Wu

**T**he PMI-OC Board of Directors is pleased to recognize **Atuljeet Singh Anand, PMP** as the chapter's Volunteer of the Month for December 2009!

Atul, as he is known, makes an invaluable contribution to the chapter by serving as the webmaster for the PMI-OC website, [www.pmi-oc.org](http://www.pmi-oc.org). Now that our communications have gone completely electronic, the website and digital *Milestones* are the primary communications channels for the chapter. Atul does a great job of keeping the website lively, informative, and interesting.

Atul has been on the chapter IT team for one year. As webmaster, he helps us by coordinating with the vendor to resolve website issues, responds to user problems and questions, and works closely with programs and marketing to create web pages and HTML code. He is also a member of the PMI-OC IT Change Management Board.

Atul has been a PMI-OC member for two years. He received his PMP® certification in 2008 and immediately started looking for a place to help out. The website was a natural fit, given his background and experiences.

# THE ELEVATOR SPEECH

## Setting Yourself Apart from the Competition



**DIANNE GUBIN** is well-known for helping others make informed choices about their careers. President of an executive search and contract staffing agency, career coach, and popular speaker, Dianne helps individuals with career and professional development tools and insight. At the December meeting, Dianne conducted a high-energy interactive presentation for improving our elevator speeches. She distributed elevator speech exercises to help us compose our own. While we completed our speeches, Dianne explained the tough job market and the importance of goal setting.

We each set our goal and drew a picture of it. Dianne assured us we did not need to be artists to draw our pictures, just as long as we identified our individual goals. She also stressed the importance of following our passions and incorporating them into our careers.

Now that Dianne had us visualizing our goals, she began asking for volunteers to recite the elevator speeches they had worked on. Elevator speeches should be short and to the point, but should also make the other party interested in hearing more about you.

Dianne had some very important tips for elevator speeches:

- Repeat your name twice during the introduction.
- If possible, include the name of a major corporation as a reference.
- Make sure to emphasize what can you do for the company.
- Briefly describe how you would address the company's problems.

According to Dianne, transitions are taking longer, and you should always be prepared to inform others about YOU and what you bring to the table. Make sure to imbed your name in your speech.

Dianne went on to request a few more volunteers to practice their elevator speeches and responded with great suggestions on how to highlight talents. A raffle for one-on-one career coaching rounded out the evening, and Dianne closed by emphasizing five elevator speech must-haves: (1) empowerment, give yourself permission, (2) transferable skill sets, (3) partnerships, (4) speaking in sound bytes, and (5) practicing in front of a mirror.

Thank you, Dianne, for showing us how to speak to others about our most outstanding assets!

**Bernice Maldonado**

Dianne Gubin with PMI-OC  
Marketing Director Lori Shapiro



FIREFIIGHTERS'  
**Spark  
of  
Love**  
**TOY DRIVE**



In December 8, PMI-OC once again rocked the Wyndham when the annual **Spark of Love** toy drive, sponsored by our chapter, took place during the December dinner meeting

Each attendee was asked to bring a new unwrapped toy to contribute. The chapter donated \$500 worth of toys and hosted four firefighters from the Costa Mesa Fire Department for dinner.

This year the need for toys was greater than ever, and our gift tables were overflowing with the generosity of our members. The firefighters brought a fire engine to the event, as well as another vehicle to haul the loot in case the truck was called into service. It took several trips with help from members, Wyndham attendants, and the firefighters to load the vast amount of toys and sporting goods.

The **Spark of Love** toy drive is part of the Orange County Toy Collaborative. The organization was launched 17 years ago by the Orange County Fire Chiefs' Association to consolidate donations. The organization is comprised of the U.S. Marine Corps Toys for Tots, the 2009 Orange County Social Services Operation Santa Claus, St. Vincent de Paul Society, and the Orange County Firefighters Spark of Love to collect toys, games, and sporting goods for children from infancy to age 18. Donations are trucked to a distribution center, an old warehouse on the former El Toro Marine base. From there, over 300,000 toys are taken to multiple distribution centers where they are given to under-served children in Orange County.

This year the Orange County Toy Collaborative needed to collect 16,400 toys per day to meet the requests coming in. We are proud to have assisted in the collection of toys for this charitable group. We thank all the members who participated in making this event a success.

**Charlotte Salisbury, PMP**



*Above:*

Toys and gifts contributed by PMI-OC members and dinner meeting attendees.

*Right:*

Firefighters from the Costa Mesa Fire Department enjoy dinner with Spark of Love Project Manager Charlotte Salisbury.

*Far right*

Firefighters prepare to load toys onto the fire engine for distribution to deserving children.



# A T T H E D E C E M B E R D I N N E R M E E T I N G

## PRESIDENT'S AWARD

**O**n December 8, PMI-OC honored eight individuals with the prestigious President's Award, which recognizes volunteers who have performed especially meritorious service. These awards honored the volunteer efforts that made our **20th anniversary gala and career fair** the great success that it was.

We awarded the president's recognition to **Susan Ashwell, PMP**, the overall project manager for the career fair. This role required Susan to employ all of her PMP® skills as she dealt with scope, cost, schedule, risk, communication, resources, and integration.

Susan had served as chair of this event in 2008 and built on that experience in 2009. Starting in the early spring, she began to coordinate the venue, advertising, sponsors, speakers (except the dinner speaker), and, most importantly, the volunteers. Working throughout the spring and summer, Susan pulled all of the pieces together into one cohesive, well planned event. It all came together perfectly.

We were disappointed that Susan could not enjoy the accolades at the event; she was unable to see how everything materialized because of unfortunate work obligations. Stepping in for Susan at literally the last minute, **Robbin Mackenzie Thomas** did a wonderful job of executing the plans that Susan had carefully prepared. On the day of the event, the coordination was so seamless that both vendors and participants commented on the efficiency. We had many vendors and participants who were able to network extensively and expand their opportunities.

One of the key areas of every event is registration. This part of the evening ran very efficiently, and for that we thanked **Catherine Ford, PMP** and **Patti Morales Cruz, PMP**. Their professional and engaging attitudes supported the extensive preparation before the event. Using our new online registration system, Catherine and Patti had organized each registrant so that when they appeared at the registration table, both registration and materials required minimum effort. We have rarely had an event where we managed the complex registration of over 250 attendees in such a professional manner.

As in the recent past, **Alvin Joseph, PMP**, was our facilities coordinator. Alvin distinguished himself by engaging in all of the small details. He personally verified the audio-visual equipment in each of the rooms and took it as his personal mission to make sure that the equipment was available, with backup, for each segment of the event. He met with our keynote speaker and sought out the specific requirements he requested. We rarely notice when things go well, and in this case, they went so well that we received high marks in our post event facility survey.

**Prafulla Vyawahare** was an indispensable help to Alvin in the breakout room. Prafulla not only took on the responsibility of

assisting the three speakers, but he was available in the room throughout the afternoon to attend to handouts, individual needs, and to assist with seating for the late comers. His calm demeanor and excellent people skills added to the professional atmosphere that was evident during each of the presentations.

**Kristine Hayes Munson, PMP** coordinated our past presidents' attendance and the ceremonies recognizing them for their roles in making the chapter what it has become. Kristine contacted each of the past presidents and personally invited them to attend the event. She coordinated with the event staff to ensure that their



*Left to right: Jason Richmond, Robbin Mackenzie Thomas, Catherine Ford, Patti Morales Cruz, Prafulla Vyawahare, Alvin Joseph. Not pictured: Susan Ashwell, Kristine Hayes Munson.*

experiences would truly recognize all that they had done for the chapter. She also organized a small event where the past presidents mingled with each other and reminisced over their contributions to the chapter. Without this effort, the success of this major event in the evening's program would not have been as successful.

**Jason Richmond, PMP** met one of the most difficult challenges of the event. He took the lead in recommending the keynote speaker. It is always difficult to find a person who can grab the attention of the audience while delivering a heartfelt motivational message. Jason recommended Vince Lombardi, Jr., who certainly met the established criteria. Not only did Jason present a number of qualified candidates, he also did all of the fact and reference checking required in negotiations with the various agents and organizations. As a result, we negotiated a very fair and reasonable fee for the keynote speaker.

We are very lucky to have such focused and dedicated individuals as our volunteers. When you have an event like this, with a board member from PMI® attending, with such a large turnout from our own chapter, and with the largest gathering of past presidents in the history of PMI-OC, it is important that the effort be first rate. In this case, the chapter benefitted greatly from the dedication and professionalism of each of these individuals who together formed the core team that made this event such a success.

It was with great pleasure that the chapter presented the President's Award to these high achieving individuals who deserved this special award for their service.

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

AT THE DECEMBER DINNER MEETING



**Left, top to bottom:**  
 Amy Schwenk, new member  
 Cookie decorating station  
 Gregory Scott and Fred Kilby  
 Catherine Ford, Stephen June, and Alvin Joseph.  
 Lucky raffle winner, Evelyn Brooks, receives a Case Crown messenger bag from Lori Shapiro.  
 Lori Shapiro presents an iPhone case to Ted Collins, another lucky raffle winner.  
 Dianne Gubin displays her book, *Power Ladder*.

**Center, top to bottom**  
 Our beautiful Christmas tree  
 Robbin Mackenzie Thomas, Bernadette Laporte from Leverage Point, and Jason Richmond enjoy Dianne Gubin's presentation.  
 New PMPs: Gary Cohen, Vazi Okhandiar, Michael Valdez, Roberta Hall

**Right: top to bottom**  
 Jeff Eyrich, collects business cards for the Leverage Point raffle.  
 The lucky recipient of a Flip video camcorder from Leverage Point

## Next PMI-OC Orientation Meeting January 20, 2010

### Welcome to Project Management Insitute-Orange County Chapter.

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/Governors, 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, January 20, 2010**

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)

# M

## The PMI-OC Marketing Team

Marketing team volunteers met for a year-end dinner on December 2 at Pizza d'Oro in Fountain Valley. We had a great turnout, with 19 volunteers attending, including two 2010 PMI-OC Board of Governors members, Stephen June and Rick Nalle.

Over the course of 2009, nearly 60 volunteers gave their time and effort (nearly 2,000 hours) to the marketing team, contributing to the ongoing success of PMI-OC. This team has written articles for *Milestones*, provided photographic skills, contacted advertisers and sponsors, promoted our corporate outreach and Project of the Year initiatives, built relationships with affiliate organizations, and worked at the PMI-OC table at various conferences and dinner meetings. These efforts help promote our chapter in the Orange County community and ensure that our members are aware of project management related events happening throughout the calendar year.

Our dinner allowed us to celebrate these efforts. And, we also took some time to discuss the 2010 year and how the changes in the board structure will affect the team. It was a nice evening, full of friendship and networking, and gave us an opportunity to discuss how we will continue our involvement in 2010. Thanks again, to ALL of the 2009 marketing team volunteers.

**Lori Shapiro, PMP**  
2009 Marketing Director



*Seated, clockwise:* Lily Sieu, Rick Nalle, Sharon Welden, Colby Riggs, Lori Shapiro, Bill Georges, Annemarie Belteu, Cristian Belteu, Jennifer Murphy, Donna Reed, Patty Tutor, Stephen June, Rod Bowden, Raymond Wah

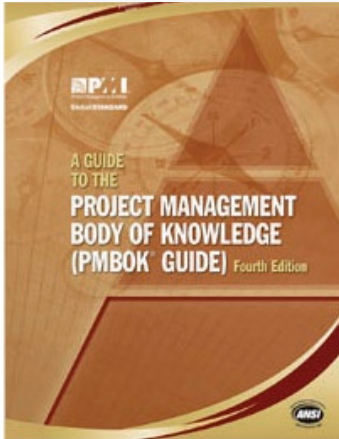
*Standing at back, left to right:*  
Farid Mohabbat, Qiong (June) Xu, Grace Wu, Greg Savage

*Photographer (not pictured):* Diana Wei



# WANT TO BE PMP CERTIFIED?

This workshop will use the *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*.



Corporate discounts are available. Register three or more people from the same organization and pay only \$600 per person. That's a savings of \$150 or more per person.

Contact [finance@pmi-oc.org](mailto:finance@pmi-oc.org) to register your group and take advantage of our corporate rate.

Studying for the PMP® Exam?  
Need qualifying education contract hours?

PMI Orange County Chapter announces its  
2010 Winter Course.



## PMP EXAM PREPARATION WORKSHOP

### SIX SATURDAYS BEGINNING JANUARY 16

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 receive a classroom discussion guide and a supplemental text that includes study questions on CD-ROM. Participants will also have access to additional study material.

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

January 16	January 30	February 20
January 23	February 6	February 27

**Where:** Costa Mesa

University of Phoenix, South Coast Learning Center  
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.

- **PMI-OC Member:** \$750, at the door \$850
- **Non Member:** \$850, at the door \$950
- **Corporate discounts are available.**

[Click here 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.*

# CALL FOR NOMINATIONS



## Deadline for Nominations:

*Preliminary chapter level nominations are due no later than January 25, 2010. 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. [Click here to download an application.](#)*



## 2010 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 2010 PMI Project of the Year.

### Preliminary (Chapter) Level:

POY nominations must be submitted to PMI-OC no later than **January 25, 2010**. A PMI-OC panel of judges will select the chapter's nominee (PMI-OC POY). The PMI-OC POY project manager will submit the nomination to PMI Global no later than March 1, 2010.

### Semi-Finalist Level:

A PMI Global panel of judges will select three semi-finalists from nominees submitted by individual PMI chapters. The three semi-finalists will be selected by May 10, 2010 and will be submitted for finalist judging.

### Finalist Level:

A final PMI Global panel of judges will select the 2010 PMI Project of the Year from the three semi-finalists. The recipient will be selected by July 19, 2010, and the award will be presented at the PMI Global Congress, North America, in October, 2010.

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).



The 2009 PMI-OC Project of the Year was awarded to Behr Process Corporation's website redesign, Project Trinity. See August 2009 *Milestones*. [Click image to view project.](#)

The 2009 PMI Project of the Year was awarded to Fluor Enterprises and Newmont Nevada Energy Investment for their Newmont TS Power Plant Project. [Click here to view project.](#)

# CONFERENCE REVIEW

By Janet R. Brown



Keynote address, Wednesday, November 18  
David King, CIO, WellDyne, Inc.

In times like these, sometimes it's the kindness of strangers that can make a big difference. And that's how I ended up attending the recent PW&WCBA in November at the Disneyland Hotel.

At the last minute, a trusted colleague told me about the PMI-OC 20th anniversary career fair and gala celebration. All in all, it was an inspiring day, even before the evening events. Although I didn't know anyone when I arrived, I found that by the end of the day, I had met new friends and colleagues at each of the day's events, the career fair, the cocktail hour, and the dinner with keynote speakers.

Continued on page 12

## CONFERENCE REVIEW

Continued from page 11

The last item of the evening gala was a raffle for fully paid tuition to the upcoming PW&WCBA conference that was generously provided by the Institute for International Research. As I listened to the numbers being called, all of a sudden I realized that I won the grand prize, and my hand shot straight up in the air. It was a very exciting moment! I instantly felt connected to something larger, just like being on a great project.

The PMI-OC gala was in September, and the conference took place in mid-November. For the two months that followed, everyone I spoke to in my personal and professional life had heard about PMI-OC and the PW&WCBA conference!

As the conference quickly approached, I was in a quandary. There were so many interesting and informative sessions and speakers to choose from that I wanted to clone myself and be a fly on the wall in each one.

Since I had only recently learned about the International Institute of Business Analysts (IIBA®) and Business Analysis Book of Knowledge (BABOK®), I decided to sit in on the all day session, “Jogging Through the IIBA BABOK,” to get the quick hit overview.

Jogging was an adept description. We started at 8:00 a.m. and continued until 6:00 p.m. with a couple of coffee breaks and a luncheon with the other attendees. Although it was a small group, everyone was engaged, with participants from as far as Dubai and all across the U.S.

The instructor led the workshop using a customized requirements road map tied to each BABOK area, with recommended tools and techniques to zero in on each. The BABOK knowledge areas discussed included:

- Business analysis planning and monitoring
- Requirements management and communication
- Elicitation
- Enterprise analysis
- Requirements analysis
- Solution assessment and validation

Keywords are often used to initiate the business analysis process and were linked to tools and techniques as presented below. These tools and techniques, along with identification of data requirements represented in data models and data state diagrams comprise the components required for comprehensive business analysis:

- **Why:** define goals, objectives, vision (initiating business requirements).
- **Who:** define stakeholders.
- **What:** capture business rules (maintain a glossary).
- **When:** capture triggers and results using an event-response table.
- **How:** develop use cases, process maps.
- **Validate:** develop prototypes.

Emphasis was placed on the function of the IIBA BABOK as a set of standards only, rather than a methodology, a training guide, or a complete set of tools and techniques. The instructor did an excellent job of providing the framework within which to reference and use the IIBA BABOK.

The following two days of the conference were equally full. My favorite time of each day was first thing in the morning when all the participants gathered to listen to three or four keynote speakers. All of the keynote speakers were either CIOs or published authors, and their leadership qualities came shining through each presentation.

Thank you to the PMI-OC board and chapter members for helping make the last few months leading up to this new year so much richer and fuller for me as a result of the fantastic opportunity I had to attend the PW&WCBA conference. ■

# PW&WCBA



**Top row, left to right:**  
 Keynote Speaker James Di Marsio, CIO Mazda North American Operations  
 Speaker Chuck Miller, PM, Prescription Solutions  
 Taking notes Paul Shiro from the Wisconsin DOT offers a testimonial.

**Second, third, and fourth rows, left to right:**  
 Lunch at the Disneyland Hotel  
 Keynote Speaker Mark Morgan, author of *Executing Your Strategy*  
 Disney detail

**Fifth row, left to right:**  
 Keynote speaker Vincent Cirel, SVP and CIO, Norwegian Cruise Line  
 Kathleen Barrett, IIBA President

**Bottom row, left to right:**  
 Attendees taking a break  
 Presentation slide from Conrado Marlan, Regional Project Portfolio Manager, DHL Express

# Software Configuration Management

**Brad Belmore**, quality systems and product manager, gave an information-packed talk on software configuration management at the December ATS. Mr. Belmore's experience includes CMMI level three implementation, ISO 9001:2000 implementation, engineering process group lead, and teaching at several institutions, including UC San Diego. He holds an MBA and a certificate in systems engineering, and is a past president of the San Diego Society for Software Quality.



Mr. Belmore began with a high level overview of the capability maturity model, which is a software development process approach for improving performance. There are five maturity levels. Level one has unpredictable processes and is poorly controlled. Level two is “managed” and is often reactive. Level three is “defined” and proactive. Level four is “quantitatively managed,” and level five is “optimizing.”

We covered compatibility of CMMI to other quality methodologies, such as ISO 9000 and Six Sigma. We also learned some basic CMMI concepts. At level two there are seven process areas, including configuration management.

Other process areas are requirements, project planning, monitoring and control, supplier agreement management, measurement and analysis, and quality assurance. Additional process areas in level three include technical solution, product integration, verification, validation, organizational process training, risk management, and decision analysis. For more information on CMMI, visit [www.sei.cmu.edu/cmmi/](http://www.sei.cmu.edu/cmmi/).

A useful concept was *Goal/Question/Metric*, [www.gqm.nl/](http://www.gqm.nl/). This software metrics approach is promoted by Victor Basili and Dr. David M. Weiss and allows us to act, analyze, and report on ONLY those items that add value to a software development team. This measurement model is defined on three levels: conceptual (goal), operational (question), and quantitative (metric). The first three steps of the GQM process use business goals and define productivity and quality measurements. Questions define the goals in a quantifiable way, and then measures are specified to answer those questions and track progress.

The next three steps are used for decision making: developing methods for data collection, providing feedback and corrective actions, and holding a post mortem analysis of the data. For more information, there is a GQM white paper by Victor Basili at [www.cs.umd.edu/~basili/publications/technical/T89.pdf](http://www.cs.umd.edu/~basili/publications/technical/T89.pdf).

Software configuration management (SCM) is a big part of software development. The Standish Group study of business-critical projects reported that only 16 percent of companies ship a software product on time and on budget. Fifty-three percent are either over budget, late, and/or functionality is reduced. Thirty-one percent fail. A well defined software configuration management strategy is vital to improving these outcomes.

Why do companies fail at software configuration management? A big reason is lack of sponsorship and commitment at the top. Lack of understanding about the SCM lifecycle, failure to provide resources, and underestimating the effort involved are also contributors to failure.

What is SCM? Both IEEE-STD-610 and ISO have similar definitions. The ISO definition is: *a supporting process whose purpose is to identify, define, and baseline items; control modifications and releases of these items; report and record status of the items and modification request; ensure completeness, consistency and correctness of the items; and control storage, handling and delivery of the items.*

Mr. Belmore gave us some additional elements of the SCM process:

- Functional areas of SCM include version and configuration control, configuration item structuring, construction of software builds, change management, team support, process management, audit support, and status reporting.
- SCM imperatives include reproducibility, archive protection, audit trails, documented build procedures, a dedicated build environment and documented processes.
- SCM tools are the mechanism that practitioners use to implement and maintain the processes. Examples would be a version control tool and a defect/issue tracking tool.

When multiple module releases are supported, a standardized branching and merging strategy should be used. The purpose of branching is to provide independent work areas when code has become unique or incompatible. Unnecessary branching causes confusion, but no branching limits development flexibility. If branched code is not merged, products diverge and become separate products.

A branching strategy should be challenged periodically for improvement. Newer branching mechanisms use automated databases that apply tags to changed files. Adopt enterprise level tagging rules. Document build procedures for repeatability. Check that code and unit tests are complete. Report the delta for all changed files, and perform all build activities in a dedicated build environment. Integration test for both feature and performance, and use standard data fields for issue/defect tracking. Standardize the software delivery mechanism.

When choosing an SCM tool, first develop an SCM process model that complements your software development life cycle. Gain support at the highest levels, and capture tool requirements that support the model. Evaluate tools objectively with demos, proof-of-concept, and hands-on.

There are different software “builds.” There is a desktop build that a developer uses for initial, informal software testing. This is not acceptable for formal release testing. An in-process build is performed by a software configuration management team member, and uses tags. It is most often used for testing and code/design reviews. The release build sets a new version baseline and is performed in a dedicated environment.

When releasing a new version, label all items associated with the release, including source code, build procedures, and test records. Capture information about the environment and maintain a full development history to enable reproduction of the exact configuration that was released.

The class was full of information, with only an overview of some key concepts included in this article. For more information on software configuration best practices and branching, see page 21.

**Patty Tutor, PMP**



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### Agile PM Websites:

For knowledge: <http://agile-pm.pbworks.com>  
For PMI members: <http://agile.community.pmi.org>

## Sample PMP® Exam Questions

These questions are based on the *PMBOK® Guide, Fourth Edition*. Answers are on page 19.

1. The two processes within the initiating process group are
  - a. develop project management plan and develop scope statement.
  - b. develop project management plan and develop preliminary project scope plan.
  - c. develop project charter and identify stakeholders.
  - d. develop project charter and develop scope statement.
2. The process which is primarily concerned with authorizing the project or project phase is
  - a. scope initiation.
  - b. develop project charter.
  - c. project planning process.
  - d. develop project scope.
3. The system which defines items requiring formal change control and the process for controlling changes to such items is known as the
  - a. contingency review system.
  - b. procurement administration system.
  - c. configuration management system.
  - d. integrated control change system.
4. A member of your team brings ideas for enhancements to the scope of work to a team meeting. These suggestions will add work to the project that is beyond the requirements of the project charter. As project manager, you point out that only the work required for the project should be completed by the team, or the project could miss its goals. You are
  - a. performing integrated change control.
  - b. collecting requirements.
  - c. verifying scope.
  - d. managing risk.

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## Answers to PMP® Exam Questions

From page 15

- 1. c. Develop project charter and identify stakeholders.**  
Chapter 3, Section 3.3 (Initiating)  
Develop project charter is a process in the integration knowledge area, and identify stakeholders is a process in the communications knowledge area.
- 2. b. Develop project charter.**  
Chapter 3, Section 3.3.1 (Framework)  
Choices a, c, and d are NOT processes defined within the PMBOK® Guide.
- 3. c. Configuration management system.**  
Chapter 5 (Monitoring and Controlling), Section 5.5.1.1  
For choice a, contingency reserves address the additional funds or time needed to minimize the rise of overruns; choice b, administer procurements, is the process of managing the contract and the relationship between the buyer and seller. A certain amount of configuration management will be used by the contract administrator; choice d is too broad, making choice c the best answer.
- 4. a. Performing integrated change control.**  
Chapter 5 (Monitoring and Controlling), Section 5.5  
The answer cannot be choice b, as the product requirements and project charter already exist. It is not choice c, since you are not accepting any completed deliverables. Choice d is not the best answer.

Sample exam questions submitted by  
**Diane Altwies, PMP**, Core Performance Concepts, Inc.

## January 12 Dinner Meeting

**Steve Kaye, Ph.D.**

Time Management Uncovered

See page 1.

[Click here to register.](#)

## January 16 Advanced Topic

**John Chen**

The Identification, Assessment, and Mitigation of Risk in Nuclear Programs Development

See column at right.

[Click here to register.](#)

## January 16

**PMP Prep Winter Workshops Begin**

See page 9.

## January 20 PMI-OC Orientation

See page 8.

## January 25 2010 PMI-OC POY

**Project of the Year**

Deadline for Nominations

See page 10.

## February 6 Advanced Topic

**David Jones**

IT Offshore Development Management

A Project Manager's Perspective

See column at right.

## February 9 Dinner Meeting

Speaker and topic to be announced

*Coming events may be subject to change.*

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**January 16, 2010**



## The Identification, Assessment, and Mitigation of Risk in Nuclear Programs Development

**Presented by John Chen**

PMI-OC is proud to present **John Chen**, UCI instructor for the Paul Merage School of business and extension programs. John will speak about using the project management risk management process (identify, assess and mitigate) to deal with the ultimate risks of the effects of nuclear weapons. John will show participants how to use the PMBOK® risk management steps with non-project situations.

Presentation topics will include (1) identification of risk in nuclear programs development, (2) assessment of risk in nuclear programs development, and (3) mitigation of risk in nuclear programs development.

John Chen is a management professional with more than 30 years of experience in project management, business development, capital project financing, engineering, procurement, construction, and administration. Since 1996, he has been lecturing in the UCI MBA program, as well as through the UCI corporation management advancement program.

**February 6, 2010**



## IT Offshore Development Management: A Project Manager's Perspective

**Presented by David Jones**

Presentation topics will include: determining which projects to offshore, common problems associated with offshoring projects, selecting an offshore partner, a framework for managing offshore projects, managing a global team, and cultural differences from multiple countries.

**David Jones** is the vice president of professional services for Alvand Solutions and has over 20 years experience implementing, supporting, developing, and managing IT projects. He has experience as a member of an offshore development team and has managed multiple offshore development teams. David has successfully implemented projects for numerous large corporations in the financial services and retail industries.

**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, January 16, 2010, 8:00 a.m. to 12:00 p.m. [Click here to register.](#)  
Saturday, February 6, 2010, 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

# PMI-OC Dinner Meeting

Tuesday, January 12, 2010

Program: **Time Management Uncovered**  
Steve Kaye  
[Click here to register.](#)

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

Schedule: **5:15 -6:00 p.m. Free resume reviews, courtesy of Technisource, for members in transition**  
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Make your reservation by 10:00 p.m. on Monday, 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 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, January 10, or anyone who makes a reservation and does not attend, will not receive any refunds.

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## Software Configuration Best Practices and Branching

From page 14

*High-Level Best Practices in SCM*, from Perforce Software  
[www.perforce.com/](http://www.perforce.com/) basic branching and guidelines

*The Importance of Branching Models in SCM*  
by Chuck Walrad and Darrel Strom

A strategic overview of branching concepts  
[www.accurev.com/product/docs/SCMBranchingModels1.pdf](http://www.accurev.com/product/docs/SCMBranchingModels1.pdf)

*Software Configuration Best Practices* by Uttam Narsu  
Overview of SCM (beyond branching)  
Can be obtained from Accurev with registration.  
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January 2010, Volume 22, Number 1

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