PMI ORANGE COUNTY CHAPTER

Milestones

October 2010

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

BUSINESS TRANSFORMATION

George Schlitz is founder of BigVisible Solutions, a coaching and enablement consultancy. George has coached teams and leaders in improving product development methods and leadership of complex programs and projects. He has had extensive experience consulting in large organizations covering many industries.

With a focus on systems thinking and organizational change, George is effective at guiding large scale change efforts in challenging cultures. George combines the strengths of agile methods, lean concepts, theory of constraints, and other related areas of organizational development and change in his consulting.

George is a Certified Scrum Coach (CSC) and a PMP®. He is a founding member of PMI's agile steering committee, the Agile Project Leadership Network, Agile Alliance, Scrum Alliance, and more. He is also a frequent speaker at process improvement related and project management conferences and events.

How Agile Hits the Ground in the Enterprise

Agile, Lean, ToC . . . these concepts are gaining industry acceptance and increased popularity. Introduced as pure process changes to project teams, organizations quickly learn that there is much more to "becoming agile" or "becoming lean" than introducing a daily meeting or a different set of steps. The result? Fizzled transitions with less than stellar results when the impacts of these changes on the overall system are overlooked.

"Partial implementation of a holistic solution is an oxymoron," touts Eli Goldratt. If we optimize a product development team, what else has to change to realize the real benefits? Understanding this concept and being ready to answer it for your organization can mean the difference between an effective transition and a fizzled introduction of a new set of buzzwords: the difference between true realization of the benefits of lean and agile and only mediocre results and reversion to old ways. The answer will likely impact much more than you might think from reading popular books and articles, or from going through a two-day training course. The lessons can be applied to both projects and change initiatives.

At the October 12 dinner meeting, George Schlitz will share his experience in large scale change initiatives using agile, lean, and related concepts and then reveal the story of a fizzled transition and the guidance and scope that led to a successful move toward agility.

Dinner meeting sponsor:
BigVisible Solutions.

Click here to register.

In This Issue

Milestones is in an open book format, just as if you were reading a printed copy.
For small screen viewing or printing, **click here for single pages**.

President's Column

Would You Like to Be a Governor?

The chapter's nominations committee will is seeking, evaluating, and selecting possible nominees for the 2011 PMI-OC Board of Governors. **Call for nominations** is on page 3. You may have heard me or other board members asking for volunteers for various positions within the chapter, as we are always in search of quality people. However, the board of governors is a little different.

In the past, board members handled both tactical and strategic duties. In fact, most of the board's time was directed toward tactical issues. The chapter began to move toward a strategic board of governors in 2010. We established and empowered a group of people, now called directors, to run the tactical portion of the chapter. In a small chapter, with only a few committees, it was possible for the board members to manage both jobs. In a chapter of our size, trying to handle both tactical and strategic matters will lead to either a burnout of the board members, or a failure to complete some of the many associated tasks.

Clearly, the board has not yet become purely strategic. We still spend too much time on tactical matters. However, our stated objective is to move in that direction. The nominations committee is looking for the kind of people who can step up from the tactical decision making process and focus on strategic issues. Each board member, except for the president, has one or more directors beneath him or her to deal with operational tasks. Future board members must be able to lay out a vision, provide some working parameters to the directors, and delegate the implementation of that vision to the directors, with proper oversight and review by the governor.

The governors' main duties will be to work closely together to develop future plans for the chapter. Governors must be able to think in long-term time frames and articulate a vision for the chapter in three, in five, or in even ten years. We are near the end of the current cycle of a three-year plan. The board must now spend its time discussing, planning, implementing, and then nurturing, the next three or five year plan. Perhaps the board may re-evaluate our vision and mission statements. We are not the chapter we were five years ago when these statements were created. The board must respond to changing environments.

Such discussions on change might involve outsourcing one or more of the chapter's activities to companies better equipped to handle these routine tasks. Again, the board will not actually perform the steps to outsource an activity; that is the job of the respective director. But, the governors must be able to intelligently discuss the merits of such a plan. How would it meet the objectives of the three-year plan? Is the outsourcing in the best interests of the members? What are the short-term and long-term cost considerations? What are possible exposures to the chapter?

Another example might be the marketing of the chapter and its products. How do we want the chapter be perceived in the marketplace? What should the chapter do about collaborations with corporations, or with other chapters or associations? Should the chapter increase or extend its association with colleges and universities? What kind of events should the chapter produce for its members? To what extent should the chapter serve as the local marketing arm of PMI® Global?

As you can see, the next PMI-OC Board of Governors has a great deal of work to do, and it is work separate from the operational activities of the chapter. We need visionaries. We need people to think of concepts, goals, and objectives, not just someone who can create and execute a great project plan. If you think that you can step up to this role, I urge you to contact the nominations committee.

Stephen June, PMP
President

Transition
VP of Administration

Alvin Joseph

TIME FLIES. I can't believe that it's been almost six months since I was elected to the PMI-OC Board of Governors. As most of you already know, our chapter switched to a new leadership model this year, and as a result, a lot of work has gone into this transition.

The administration team (formerly knows as "operations") has been playing a key role in this transition. The administration team's role is to oversee all of the chapter's administrative operations. This includes maintaining the chapter's records, documentation (policies and procedures), board meeting logistics, annual elections, and control procedures for the chapter assets. The goal of the administration team is simple and straightforward: to have PMI-OC function easily, effectively, and efficiently.

To this end, the administration team has undertaken three major projects this year.

The first project is to document and publish a chapter operations manual to support this new organizational structure. The scope of this project includes making sure that all processes, procedures, and policies are fully documented in an effective and efficient manner. The target completion date for this effort is this month, October 2010.

The second project is to define, document and publish job descriptions for each position in the chapter, along with an organization chart. The scope of this project includes all tier one, tier two, and tier three job roles, titles, and descriptions. A draft release of this material was completed in August, and our team is currently in the process of making the final changes.

The third project is the preparation, administration, and logistics of the elections for the 2011 PMI-OC Board of Governors. The scope of this project includes working with the nominations committee to ensure that elections are performed in accordance with PMI-OC bylaws. Preparation for the next election is expected to begin this month.

We have a dynamic administration team that is working hard to accomplish these projects, and I would like to introduce you to some of these team members who are working in key leadership roles.

June Xu is the director of administration. Four project managers report to June.

Jane Zheng heads the business process management team and is responsible for the documentation of policies and procedures.

Diana Wei heads up the board of governors support and manages the board meeting logistics, as well as the annual elections.

Debra Moss manages the administration operations team and is responsible for compliance, chapter tools, and asset management.

Shaik manages the knowledge management team and is responsible for defining the chapter's repository structure, version control, and change management.

As the member of the board of governors who is responsible for chapter administration, I am committed to building a strong volunteer team.

By volunteering some of your time to these activities, you will not only help the chapter, but you will also find that you are building a valuable professional network in addition to learning new skills that can give you a competitive edge in the marketplace.

So I encourage you to get involved. We have a number of positions still open on the administration team.

Two of them are (1) business process analysts and (2) project manager for the annual elections. If you'd like to join our great team, please feel free to send me a quick e-mail.

Once again, it is my pleasure to serve as the vice president of administration on the PMI-OC Board of Governors. I look forward to a successful year. Thank you.

Alvin Joseph, PMP

CALL FOR NOMINATIONS

Your nominating committee is seeking leaders for the **2011 PMI-OC Board of Governors**. The ideal candidates will be strategic thinkers who want to make a difference by using their talents and skills to lead our current and future organization.

We are looking for individuals who can bring their developed talents and skills to a board that will offer personal and professional growth, along with enhanced self esteem.

If you are striving to achieve leadership positions in your personal career, we can help you further develop your leadership skills.

For more information and/or to discuss the opportunity further, please contact **Nominations@pmi-oc.org.**

We look forward to hearing from you.

Thank you.

The PMI-OC Nominating Committee

Volunteer Opportunities

Milestones Contributors

The *Milestones* team is seeking writers (or copy editors) to write articles about dinner meetings, advanced topic seminars, and other chapter news. Clear and concise writing styles are required.

Milestones Photographers

The *Milestones* team is looking for individuals with an eye for style to take pictures at chapter events for *Milestones.* Must have a digital camera and flash unit for photos in indoor and outdoor venues. Upload photos to Qtask or other specified site.

Dinner Meeting Name Badges

The events team is looking for a creative and reliable individual to prepare and print attendee name badges for various PMI-OC events. Requires up to four hours per month. Start immediately.

External Marketing: Affiliate Management Chair

The chair of the affiliate management committee will assist in preparing affiliate agreements between PMI-OC and other Orange County organizations. The chair will manage affiliate relationships and communicate the stipulations of each agreement to other committees (*Milestones*, website, programs, etc.) as needed.

Finance: Events Registration

The finance team needs assistance from individuals who will be able to attend the monthly dinner meetings and assist with attendee check-ins. Duties may include money handling, head count tracking, and follow-up reporting.

Information Technology: Event Website Editor

Sets up the events (dinner meetings, ATS, and PMP prep workshops) on the PMI-OC website, following a predefined schedule. Coordinates with programs and marketing and keeps the programs director informed of the registration status by pulling the list of registrants monthly. Ten to 20 hours per month. Some knowledge of HTML, website publishing, and graphic tools highly desirable.

Interested in volunteering for any listed or other opportunities? Contact Joe Paradiso at **volunteers@pmi-oc.org** or **click here** to visit the current volunteer opportunities page at **www.pmi-oc.org**.

Sample PMP® Exam Questions

These questions are based on the *PMBOK® Guide–Fourth Edition.* Answers are on page 14.

1. As part of your project, you hold a focus group to determine the perceived benefits of the project's product. You wish to publish these results to your customer, so you post the results and the participants on your team's website. Before doing this, you should do all of the following except:
   a. making sure there are appropriate firewalls to protect the participants of the focus group.
   b. making sure all participants of the focus group have signed an authorization to post the results.
   c. if any participants decline posting the information, you should remove any reference to the participant, per the request.
   d. if only one participant declines posting the information, you can post the results as is.
2. Strategic planning, information technology, procurement, and logistics are all examples of:
   a. financial planning
   b. computer programming.
   c. interpersonal skills.
   d. general management disciplines.
3. The primary tool and technique for the plan risk management process is:
   a. diagramming technique.
   b. reserve analysis.
   c. planning meetings and analysis.
   d. forecasting.
4. A file that houses a complete set of contract documents is called:
   a. closed procurements.
   b. contracts files.
   c. lessons learned file.
   d. procurement file.

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

New Members and PMPs

NEW MEMBERS	NEW PMPs
Lesley Adams	Simon Chan
Donna Adler	John James
Srihari Atluri	Richard Lee
Stacy Blackwood	Sudesh Mehru
Myrna Bravo	Leigh Parker
Kieu-Huong Cary	Ajay Punjabi
Alvino Clary	Michael Rhymer
Otto Croes	Narmela Sargis
Kathleen Cuison	Joan Tateyama
Michael Evans	
Ken Fitz	
Jean Georges	
Doris Gin	
John Gori	
Jaime Gould	
Ravi Karnam	
Reginald Loudd	
Diana Morell	
Thomas Murray	
Harry Oei	
Rick Pace	
David Ramthun	
Jason Safabash	
Shahid Saifee	
Elizabeth Schnurbusch	
Patrick Senarith	
Israel Valdemar	
Kelli Weber	
Stephen Yoon	
Willy Young	

An Evening of Transition

Dimensions in Managing Your Career

On September 14, 2010, PMI-OC presented a special event designed to create confidence and build momentum in the current job market.

The following pages highlight some of the features of this unique event.

A Sincere Thank You to Our Great Sponsors!

Gold Level Sponsor

Steven Stover from
Platinum Resource Group
www.platinumresourcegroup.com

Representative from
120°Venture Construction
chats with PMI-OC volunteer Lily Sieu.
www.120vc.com

Sharon Jones answers questions about
IIBA Orange County Chapter
www.oc-ca.theiiba.org

Michael Downs gathers material from **Prosum Technology Services.** www.prosum.com

UC Irvine Extension displays project management course material. www.unex.uci.edu

Services and support offered by **Volt Workforce Solutions** www.volt.com

Combined Endeavors

A few of the PMI-OC members of the newly chartered Orange County Project Masters Club, an affiliate of Toastmasters International.

Left to right:
Susan Berges
Gary Cohen
Ghafouri Mahmoud
Roger Lew
Alvin Joseph

See page 22.

Lori Shapiro, the SoTeC marketing representative from PMI-OC.

The annual SoTeC (Southland Technology Conference) is co-sponsored by PMI-OC.

See pages 18 and 19.

Guest Speaker

Tim Tyrell-Smith

Tim is a veteran marketing executive with 21 years of experience in consumer packaged goods. He opened the event with **"Tim's Strategy, Successful Job Search: It's All in Your Head."**

Tim writes about the strategy and psychology of a successful job search from the perspective of both a hiring manager and a former job seeker. He presented practical advice and tools to help attendees build a smart and positive attitude toward their job search effort.

Tim revealed that he has been where the unemployed in the room are today, and that it was not so long ago, which built a sense of camaraderie. He suggested that before you start your job search, you need to know a bit about your psychology, or your mental and behavioral characteristics.

Every action you take during your job search, such as writing a resume, meeting with a recruiter, or having a job interview, is impacted by how you feel about yourself. Your ability to succeed during the job search is based upon how you feel at that moment. It is important for you to react with confidence to the outcomes, whether negative or positive. If you do not feel good about yourself and lack self confidence, you will not be reaching out to others and doing the best things for your job search.

Tim described the four unfortunate and inhibiting characteristics of the average job seeker. These include having only a local or limited network, lacking an established personal brand, not being social media savvy, and a feeling a false sense of confidence.

The remainder of Tim's presentation offered excellent advice and tools to help job seekers improve these characteristics and ultimately succeed in gaining fulfilling employment.

Avoiding the stigma of unemployment is significant in creating confidence. Don't define yourself as an unemployed person, but act like someone worth knowing, appropriately asking for help and proactively helping others.

In addition to building confidence, some of the first things to do when starting a job search are taking stock and understanding what has happened to you and how you are feeling about it.

Establish clear job search objectives, build solid marketing materials, identify and measure your network, and set weekly and monthly goals. If you do these things on a routine basis with a full commitment, you will find a job.

Tim highly recommended that the unemployed take advantage of this time, since this might be the only break in their career. Activities might include pursuing an entrepreneurial dream, training for a half marathon or joining a local charity or organization. These are great ways to fill in the gaps between old and new jobs.

In addition, taking consulting jobs can keep you productive and allow you to test-drive companies, which might eventually turn into full time employment. It also improves your networking by being in contact with people in the workplace. Tim noted a potential negative. Consulting might consume time from your job search, delaying you from searching for the job you really want.

In summary, the job search is the act of building momentum by making new connections, developing relationships, and communicating well.

Job seekers must maintain their confidence, which Tim states is essential for a successful job search. Tim has a useful website with free job search advice, tools, and books. **http://timsstrategy.com**

Colby Riggs, PMP

Guest Speaker

Jack Molisani

"The Ten Most Common Mistakes Professionals Make When Looking for Work"

If you are, or ever have been, in transition, then you know that looking for work can be an extremely challenging task. So, when a recruiter like Jack Molisani (president of ProSpring Technical Staffing) offers his time and insight on ways to make your search more successful, you should listen.

Jack used his proven experience and sense of humor to discuss the ten most common mistakes that professionals make when looking for work. They are:

1. Not following submission directions
2. Not building professional relationships
3. Having bad manners
4. Having a negative internet presence
5. Not summarizing skills versus requirements
6. Misnaming your resume
7. Having errors in your resume
8. Incorrect evaluation of important job priorities
9. Not anticipating questions
10. Not keeping your certifications current

Jack discussed each of these job search land mines and offered proactive steps to avoid them. For example, "By not providing the requested information, an applicant demonstrates his inability to follow directions, and as a result, his resume may not be selected regardless of his qualifications."

Remember, companies search the internet to find information about you, so everything you post online **can** literally come back to haunt you. For example, messages posted on Twitter, or pictures posted on FaceBook.

Candidates also need to remember that recruiters don't have time to read your entire resume from top to bottom. So Jack recommended that you summarize your skills to match the requirements, both on your resume **and** in your cover letter. He added that when you make the extra effort to do this, the recruiters love you. Then all they have to do is verify the information and pass it on to their client.

Next, Jack reminded job seekers

to name their resumes so they can be found easily, e.g., Joe Jones.doc instead of "resume.doc. He also stated that it is absolutely vital that your resume be error free. Remember, your resume is the first demonstration of your writing skills and your ability to pay attention to detail. Hiring managers **do** judge candidates based on their resumes, and they will disqualify you if they find errors.

He also reminded us to highlight our strengths, minimize our weaknesses, and put the most applicable information, experience, or skills near the top of the resume and the less applicable experience near the bottom.

It is also important to make sure that you explain any anticipated questions such as employment gap, citizenship, or work visa status.

In closing, it should be noted that Jack Molisani went above and beyond the call of duty when he offered to allow unemployed participants to attend the LavaCon Conference in San Diego during the first weekend of October, where they could earn 30 PDUs. In addition, he offered to review their resumes and provide constructive feedback on their job searches.

I personally know of one participant who took advantage of this opportunity, and I am sure many others accepted Jack's generous offer.

So, in conclusion, Jack, thanks for your support!

Rosie Coleman, PMP

Guest Speaker

Melanie McCarthy

Melanie McCarthy is the principal of ResourceXperts, with over twenty years of experience in the IT staffing industry.

Melanie's topic was "**From Layoff to Payoff: Job Search Secrets Revealed.**" She discussed the five essential career artifacts one must create and use effectively to foster interest in your candidacy and help define "YOU, the product." In her interactive and lively session, she provided a plethora of practical pointers, innovative approaches and standout methods that will you get you noticed and hired.

Overall, everyone needs to start marketing himself or herself by creating a brand identity. Initially, you need to create a thirty-second commercial about yourself, an elevator speech. It needs to contain your contact information, who you are, what sort of work you have done, what work you are seeking, types of industry, and your greatest accomplishments. In a manner, you are creating a brand identity for yourself so you can differentiate yourself from others.

The "commercial" is extremely valuable when you have only that one opportunity to make a good first impression. The "commercial" can also be on one side of your business card so people will recall more about you and your interaction. Another marketing tool is a symbol that sets you apart. For example, if you are in data mining, you can wear a mining pick on your lapel or your name badge at a conference.

Resumes are another important marketing artifact. Melanie stressed the point that there is no final version of a resume. You need to constantly modify it for the position for which you are applying. However, you also need something that tells more about you, so she recommends creating a networking brochure, a single sheet bifold or pamphlet. The content is similar to the "commercial," but with expanded information. It can include your employers, certifications. and education.

Melanie described the current job market. Many companies are hiring again, but are filling the positions before they are advertised. The reason is that everyone who is working right now knows someone who is un-employed and highly qualified for the job. As a result, it is important to network.

Networking needs to be strategic and planned. The shotgun approach is no longer effective. Melanie suggests creating a grid which consists of a brain dump of anybody and everybody you have ever met, including people in your professional and personal life. You next contact all of these people to let them know you are out of a job and are looking, incorporating your "commercial" and sending a hard copy of your resume.

In addition to these contacts, you need to define target companies. Many companies are posting their openings on their websites only, so it is up to you to find them.

Melanie suggests defining the top 20 to 30 companies with an industry affiliation to knowledge or work experience you already have and contacting them with your cover

letter and resume. But first, research all you can about the company to create a tailored letter. The key is to express why you are so passionate about working for the company. Always follow-up with a call and your thirty second commercial.

In conclusion, Melanie stressed that to conduct a successful job search, you must tap into your unique characteristics and talents, establish your personal brand, and seek opportunities via strategic networking and creative approaches.

Colby Riggs, PMP

Keynote

Keynote Speaker

Robert S. Tipton

"An Evening of Transition, Dimensions in Managing Your Career" was a night full of powerful and dynamic speakers. Our keynote speaker, **Robert S. Tipton**, challenged us to look at our circumstances differently and get out of the status quo.

"Not everyone will resonate with my message," he said. "You may go away and still be stuck." As the author of ***Jump! Get Unstuck***, Robert made it clear to everyone that the jump model, as described in his book, is not to convince us, but to give us some ideas to consider, some thoughts to think about, and something to look at as we stand in the middle of our life or career changes.

Feeling discomfort was exactly what he wanted us to feel. He guaranteed that his success from this presentation would be determined by whether we still hear his voice in our heads six months from now, driving us crazy. How's that for a promise that the "jump" mode, if applied, truly works?

Someone from the audience asked, "How do you get ahead and stay ahead?" Robert's answer was, "Are you relevant?" This is a key component in determining whether you will get ahead and stay ahead. The world is more complex, challenges are not straightforward, we are competing with people of different cultures, time zones, and languages, and the world is headed in a different direction.

We are challenged when we continue to do things the same way, and we aren't doing things to get ahead of the curve. To get ahead and stay ahead, we must move fast and be willing to change. Robert's *Jump! Get Unstuck* gives us a road map for this leap ahead.

We first need to be clear on what we are asking for. To be clear, we must plan. Robert suggested we ask ourselves these four questions.

1. Who am I? This is a self assessment. This is where you look at the big picture. What do you want your children to say when people ask them about you? People spend very little time here, so they end up getting into something they've done before, which may not be what they love.

2. What can I do? Take a comprehensive inventory of **everything** you can do. We tend to rush into perfecting our resume, only to end up again, doing what we've always done and not what we love.

3. What are my options? This is determined by goal setting.

4. How do I get there? How do you actually get the job you're looking for? We tend to start our career/job search immediately, without any assessment or proper planning. Remember, this is last, not first in the planning process.

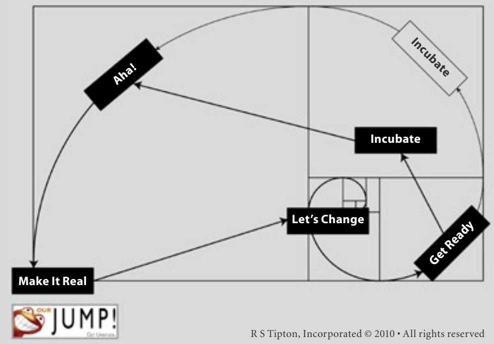
Robert asked, "How many of us are doing what we love?" Hardly anyone raised their hands. He mentioned that doing what we love is often overridden by what we sell out to (i.e., mortgage, college education, retirement, etc.).

Robert then expressed, "It doesn't feel that way in the beginning, but career changes are a gift." Taking time to unlock the things we have forgotten by being clear on what we want and planning to get what we want moves us further into realizing other choices and maximizing our potential.

Robert went on to quote Albert Einstein. "If an idea at first is not absurd, then there is no hope for it," which took us right into the Jump! Innovative Change Model.

There are four parts to this model. This innovative change model was described as an accelerated approach to energy. This model is used to move forward, and there are four components to moving forward: (1) get ready, (2) incubate, (3) aha! and (4) make it real.

JUMP! Innovative Change Model
From Preparation to Manifestation



1. Getting ready. Getting ready involves eliminating anything that will stop the growth and then adding what's needed to provide growth (i.e., cultivating). If there is no compelling reason to change, then don't. However, creating a climate for incubation (the next step in this model) is necessary, and getting ready creates this climate, allowing things to come in.

2. Incubate. Incubation was described as the art of doing nothing. This is important, but hard to do in our culture. This is where you need to let your subconscious mind go, and don't process anything. It's during the time of incubation that you become comfortable with uncertainty.

3. Aha! This is a moment of insight. This is about accepting and allowing what wants to happen as opposed to censoring and stopping what should happen.

These three stages of the Innovative Change Model are the essence of the problem solving process. The final stage is where you take action.

4. Make it real. Until you get here, you haven't changed your life at all. There are two voices you will battle with in this stage: (1) ego and (2) cheerleader. The ego is the first voice that will say, "You better not; smell it before you eat it." This voice wants you to remain small and not put yourself in the position to maximize

Continued on the next page.

Keynote Speaker
Continued

your potential. We tend to give this voice too much power.

The cheerleader is the voice that says, “Yes! Let’s do that!” This voice allows you to see that you are the best candidate and recognize that this change will help you get ahead.

Another important tool Robert suggested was the B.L.U.E tool. The acronym stands for benefits, limitations, uniqueness, eliminates.

This tool helps us find the best right answer, not the first right answer. It also eliminates those who think they know better and allows us to choose based on merit.

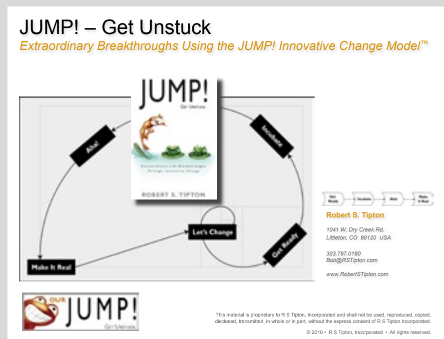
In closing, Robert shared some really great ways to move forward in a powerful direction. In pursuit of making life and career changes, remain open and trusting.

Remember, living in fear hinders the ability to be successful and the road ahead is what you choose. Allow yourself time to incubate and let things come forward. Let the insight tap you on your shoulder, then do it!

Change is something that is coming; get good at it.

Brandy Davis

Robert’s book, *Jump! Get Unstuck*, will be released November 4, 2010.



Click here to view Robert’s complete presentation.

Photos on pages 5-12, 14, and 24 by Johnny Ku and Colby Riggs

Answers to PMP® Exam Questions

From page 4

1. **d. Post the results as is.**
   B.3, Executing. Must know the Code of Conduct (download from www.pmi.org). Professional responsibility
2. **d. General management disciplines**
   Chapter 1, Section 1.6, Framework. Project managers should have a foundation in general management knowledge and skills.
3. **c. Planning meetings and analysis**
   Chapter 11, Section 11.1.2.1, Planning. Choice (a), tool and technique of identify risk. Choice (b), tool and technique of determine budget. Choice (d) tool and technique of control costs risk management
4. **d. Procurement file**
   Chapter 12, Closing, Section 12.4.3.2, procurement management

Three WAYS TO PREPARE FOR YOUR PMP EXAM

SO, YOU'VE STARTED THE APPLICATION PROCESS and are preparing to take the PMP® exam. Great career move! The PMP certification is a highly sought after career demarcation in both prosperous and challenging economic times. It is the recognition of "demonstrated knowledge and skill in leading and directing project teams and in delivering project results within the constraints of schedule, budget and resources." (Project Management Institute). Each candidate submits past project management history in an application process, and then must pass a four hour, 200 question PMP exam.

Aside from the fact that you'll need 35 contact hours to sit for the exam, studying for the PMP exam is a project unto itself. Just like most certification exams, you have three basic ways of preparing for the exam: traditional classroom based training, online courses, and self study. But don't feel limited to just one. Many people who have passed the exam have used a combination of these.

Option 1: Classroom based training requires the least amount of self discipline and comes in a variety of flavors. Your local PMI® chapter and PMI "Registered Education Providers" (REPs) offer workshops, boot camps, and classes specifically designed to teach not only what you must know, but how you will be asked to demonstrate it. Make sure your teacher is a PMP; taking the exam is an experience unto itself, and you want to know that your instructor has "been there, done that." Classroom based training can account for all, or part of, your 35 contact hours required to sit for the PMP exam.

Option 2: Online courses are great for people on the go and are usually less expensive than classroom based training because of the course provider's lower overhead. They are usually much cheaper than instructor lead classroom courses. This option requires a medium amount of self discipline because you have the flexibility of studying within your schedule. Online courses usually offer a combination of webinars that you watch, web pages that you read, and documents that you download to study.

Some have deadlines, and some do not, so though you have the freedom to complete sections on your own, you'll need a medium amount of self discipline to insure that you finish within the time allowed by you or the requirements of the course itself. Like classroom based training, online courses can account for all or part of your 35 contact hours required for the PMP exam. If this is important in your plan, be sure to confirm before you sign on the dotted line.

Option 3: Self study is the least expensive, and therefore the most common way that people study for the PMP exam and requires the most self discipline. The good things about this method are that you'll save money and you prepare on your own time. That also means you'll need to be motivated.

The biggest road blocks you'll face using this method are that you'll have to create your own lesson plan and schedule, and you'll have to evaluate and buy your own materials. If you're dedicated and focused, this is a great way to prepare. Furthermore, self study cannot be counted toward the 35 contact hour requirement. You must use classroom or online training for that.

Regardless of which method you choose, most successful people who pass the PMP exam supplement self-study preparation with at least a classroom and/or an online course. With the advent of portable media players such as the iPod, iPhone, Blackberry and Zune, many choose a combination of online training and self study. Downloadable videocast and/or podcast courses allow you to take the material with you and study anywhere and anytime. It's a very powerful, cost effective. and goal oriented solution.

Summary: Once you have set the career goal of taking the PMP exam, you have to decide on your study approach. Your choice will depend on how much self motivation you have, the schedule you set and, of course, your budget. This article explores the three options that lie before you.

About the Author:

Cornelius Fichtner, PMP is a noted PMP expert. He has helped over 8,000 students prepare for the **PMP exam** with his PM PrepCast at **http://www.pm-prepcast.com**.

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

Complex PROGRAM MANAGEMENT

Jay Smedley, the current, and only, west coast senior program manager within Ernst & Young's (E&Y) program advisory services team, conducted the first half of the September advanced topic seminar. Jay's E&Y team concentrates on portfolio management in addition to program and project management.

Jay utilizes his PMP® and other project management certification knowledge, plus more than 20 years of experience at BAE and U.S. Marine Corps Intelligence, to help E&Y clients gain efficiencies via the management of risk for very large and complex projects and programs.

Jay made it very clear that his personal experience and the materials he would present are not opinions or gut feelings; they are a by-product of hundreds of independent program review (IPR) efforts with quantified measurable results. The session was to be 100 percent fact based. The participants were all ears.

Attendees learned that even though effective program and portfolio management are crucial differentiators in the marketplace, poor performance continues to be seen not only in delivery, but also in the ability to sustain the benefits of projects and programs. In fact, more projects are failing than succeeding.

Jay explained that the root cause of project failure is the complexity of continued integration within organizations, as well as the enabling technology that supports the complexity. This is a trend which must be embraced, not reduced or eliminated. As an example, when an organization model migrates away from the functional type toward strong matrix and projectized types, it increases the risk of having zero or several owners of an issue, instead of one clear owner.

When Jay analyzes projects and programs, he focuses on 12 distinct factors of complexity, which are known drivers of risk. Examples are team size, number of interfaces,

and regulatory requirements. After all 12 factors are measured, quantified, and color-coded, Jay then guides the client on the best way to adapt governance, processes, tools, and controls across all phases of a project, to minimize the risk of complexity.

An important message is that each risk needs to have a named "someone" who owns it.

Jay showed the class two color coded visual aids that he uses with clients to clarify multi-dimensional risk evaluation across project disciplines. The first visual aid identifies 27 distinct disciplines (nine each for project management, program governance, and technical solution). The second graphs show each of the 27 disciplines within the Capability Maturity Model Integration (CMMI) published by the Software Engineering Institute (SEI). This way, the client is clear on the priority of improvement efforts.

After showing a graph, which clearly indicated the benefits of assessing risk early in the program, Jay walked the class through the ten critical questions that stakeholders, at both executive and program levels, should ask to gain confidence in program management.

Jay told many interesting stories from his experience to highlight the main points of his presentation and then allowed questions from the class, which, in turn, led to more interesting stories. The time flew by and, at the end of the session, the class acted like a crowd at a concert begging for one more song.

Judith Berman and **Robert Pettis** conducted the second half of the seminar. Judy and Bob not only presented "The Business Side of Project Management" at the August ATS, but also coordinate the seminars each month.

Judy and Bob expanded on Jay's presentation with materials and exercises to cover out of control, or runaway, projects or programs.

What are the reasons and root causes for out of control projects and programs? How do we identify the signs? What is the sequence of steps necessary for rescue? What questions should we ask early on for prevention?

Photos by Mary Fasang

Judy and Bob explained many reasons why programs get into trouble. Some of them are directly related to poor control of the *PMBOK*® three point constraint of schedule, cost, and scope. Others range from cultural issues and inexperienced team members to lack of backup vendors for hardware and software purchases.

A Toronto-based survey highlighted several root causes of runaways. The top four are (1) shifting organizational priorities, (2) lack of scope clarity, (3) poor change management, and (4) poor risk management.

Judy and Bob's signs of a runaway program overlapped many cited by Jay in the first half of the session: missed deadlines; confusion about tasks, requests for more project budget, poor status reporting, poorly maintained plans, and large tasks not being broken down into sub-tasks.

Next, Judy and Bob explained the logical sequence of nine steps to rescue a runaway project, with the first step being to stop or pause the project, or at least minimize waste if the project cannot be paused.

Steps two and three involve conducting a scope review and obtaining executive permission to review further, followed by admission that a problem exists. Step four is a formal audit and report of the root causes. Stabilization of the team is important at this point. Resources need to be assured, and proper procedure emphasized.

Step five revalidates the ROI of the project and assesses the effort to complete. Assessment includes not only financial estimates, but also actual versus planned task starts and completions.

The results of step five are used in step six to compare to other projects to determine if the project remains a wise and proper use of capital.

Steps seven through nine redefine "complete" for the project, allow for adjustment of resources, and guide sponsors on how to relaunch the project for success.

The class received a detailed and complete list of questions they can use to ascertain whether any project or program is headed for trouble.

Judy and Bob left the class forewarned and forearmed!

James Morin, PMP

The Agilista

Donna A. Reed
Your PMI® Agile Community of Practice Rep

Agile Requirements: Not an Oxymoron

Adult children, jumbo shrimp, green stop signs; I'm sure you recognize these things as oxymorons, self-contradictory phrases or objects, often with ironic meanings.

Should we add "agile requirements" to the list? Does agile development fit in with traditional requirements practices? And if so, how?

Traditionally, defining requirements involves careful analysis and documentation and checking and rechecking for understanding. It's a disciplined approach backed by documentation, including models and specifications. For many organizations, this means weeks or months of analysis, minimal cross-team collaboration, and reams of documentation.

In contrast, agile practices; Lean, Kanban, Scrum, and so on; involve understanding small slices of requirements and developing them with an eye toward using tests as truth. You confirm customers' needs by showing them delivered snippets of software.

But agile projects still produce requirements and documentation, and they involve plenty of analysis. On the best agile projects, requirements practices combine discipline, rigor, and analysis with speed, adaptation, and collaboration. Because software development is a knotty "wicked problem" with evolving requirements, using iterative and agile practices is not only common sense, but also economically desirable.

Indeed, agile requirements drive identifying and delivering value during agile planning, development, and delivery.

Planning. Agile teams base product requirements on their business value; for example, boosting revenue, cutting costs, improving services, complying with regulatory constraints, and meeting market goals. If you're agile, it means that you focus on value and jettison anything in the product or process that's not valuable. **Read full article.**

To learn more about the agile method of developing requirements and how "traditional" requirements practices are adapted on agile projects, join industry leading trainer **Ellen Gottesdiener** at an upcoming FREE webinar on October 13. **Click here.**

Webinar (Earn PDUs)

October 13: Agile Requirements: Not an Oxymoron

PMI Agile Community of Practice website

Subscribe to ***The Agilista PM*** weekly newsletter

Questions: **agile@pmi-oc.org.** Donna will respond.

Blue text indicates active link.

SoTeC 2010

Friday, October 29 and Saturday, October 30

Sign up at www.sotecconference.com.

Early bird savings of $50 through October 10!

Register now for this successful collaboration of technology and project management professionals!

Invite your non-member associates. The six Southern California sponsoring organizations (including PMI-OC) offer their members and other professionals this annual, high quality, cost effective venue for professional development and networking.

Returning to the Long Beach Hilton at the World Trade Center this year, nationally and regionally recognized speakers and industry leaders will inspire and educate attendees on the theme:

We've Done With Less, Learn What's Next

Three nationally recognized keynote speakers: **Rich Hoffman**, **Peter Coffee**, and **Susan Cramm**, will present topics important to all. See next page.

Special Pricing Available. In recognition of the continuing challenges in the economy, special pricing programs have been continued this year to assist members, people in transition, students, and organizations. **Check out the conference website for details.**

Conference Breakout Topics. In addition to keynote speakers and networking sessions for all attendees, breakout topics will be presented throughout both days. These sessions will allow project management and technical professionals to become familiar with trends and techniques in both areas of focus.

Breakout topics are in the areas of **quality management, project management, personal development, technology trends, and best practices.**

Sponsor displays throughout the conference will keep you informed about current products and services. By visiting each vendor, you will be eligible for a special raffle at the end of the conference.

REGISTER NOW! Come and join your fellow professionals in Long Beach!

Greg Scott
PMI® SoTeC Representative

2010
Southland Technology Conference

Oct 29th & 30th, 2010
At the Long Beach Hilton

We've Done With Less, Learn What's Next!

The **Southland Technology Conference** is the premier technology event in Southern California and is celebrating its 11th anniversary.

This conference will include

- *Top Industry Speakers*
- *Vendor Showcases*
- *Structured Networking*
- *Amazing Door Prizes*
- *Cost-effective PDUs*
- *SoTeC Inspiration Award*

REGISTER NOW!

Members:
EARLY BIRD until October 10
$199 for two days

In transition rate:
$115 for two days

www.sotecconference.com

Members of sponsor organizations get member pricing.

Southland Technology Conference is a collaboration between PMI-OC, SCQAA-OC, SCQAA-SF, SCQAA-IE, IIBA-OC, and QAI.

2010 Keynote Speakers

Rich Hoffman

Vice President and CIO of Avery Dennison, will present "A CIO Perspective: From My Desk to Yours."

Peter Coffee

Director of Platform Research at Salesforce.com, will present "Moving Beyond Migration: Re-Inventing Process in the Cloud."

Susan Cramm

Executive Coach and President of Valuedance®, will present "How IT-Smart is Your Organization? (aka "The Case of the Enthusiastic Amateur)."

ADVANCED TOPIC SEMINARS

November 6, 2010

Scope Management from Cradle to Grave

Presented by Mike Graupner, PMP

Presentation topics will include:

- Finding the scope baseline
- Decomposing scope without blowing the budget
- Creating a culture that banishes scope creep
- Using change management effectively

Mike Graupner, PMP, is a well known local project manager and presenter of project management topics. His training style enables learning in highly interactive classroom environments. His background includes both co-located and virtual teams of multi-national and multi-generational members.

For the last ten years, Mike has been involved in developing and deploying effective business processes supporting project management, quality management, and systems development life cycles.

Where: Keller Graduate School of Management
3880 Kilroy Airport Way, Room 207, Long Beach, CA 90806

PDUs: There are four PDUs for this event.

When: Saturday, November 6, 2010, 8:00 a.m. to 12:00 p.m. **Click here to register.**

Cost: In advance: $45 members, $50 non-members
At the door: $60 for both members and non-members

Coming Events

October 9-12

PMI Global Congress 2010-North America
Washington, D.C.

Keynote Speaker:
President Bill Clinton

Click here for information and registration.

October 12 Dinner Meeting

George Schlitz:
Business Transformation: How Agile Hits the Ground in the Enterprise

See pages 1 and 24.

Click here to register.

Oct 29-30 11th Annual SoTeC

Southland Technology Conference
We've Done With Less. Learn What's Next! At the Hilton Long Beach

See pages 18 and19.

Click here to register.

November 6 Advanced Topic

Mike Graupner
Scope Management from Cradle to Grave

See column at left.

Click here to register.

Nov 6 and Nov 13

Two Day Seminar, Strategic Project and Portfolio Management
Presented by
Core Performance Concepts
Vanguard University
Costa Mesa

See ad on page 20.

Click here for details and registration

November 9 Dinner Meeting

Joel Manfredo, CIO, Orange County
The Coming Wave: Green IT and Real Estate Convergence

Coming events may be subject to change.

PMI Orange County MILESTONES
October 2010, Volume 22, Number 10

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

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Beginning with this issue, Bill Georges joins Colby Riggs and the *Milestones* team as co-editor.

Welcome aboard, Bill.

Index to Advertisers

PMI-OC Dinner Meeting

Tuesday, October 12, 2010

Program: **Business Transformation**
How Agile Hits the Ground in the Enterprise
Presented by George Schiltz
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
Please arrive early for a good spot in line.

5:30 -9:00 p.m.
Socializing and networking, dinner meeting, and presentation

Cost: **Dinner and Presentation**

In Advance:		*At the Door:**	
Members	$30.00	Members	$40.00
Non-Members	$35.00	Non-Members	$40.00

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

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

Parking: **FREE!**

Please register at www.pmi-oc.org 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, October 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. Anyone who cancels their reservation after 10:00 p.m. on Sunday, October 10, or anyone who makes a reservation and does not attend, will not receive any refunds.

ORANGE COUNTY CHAPTER

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