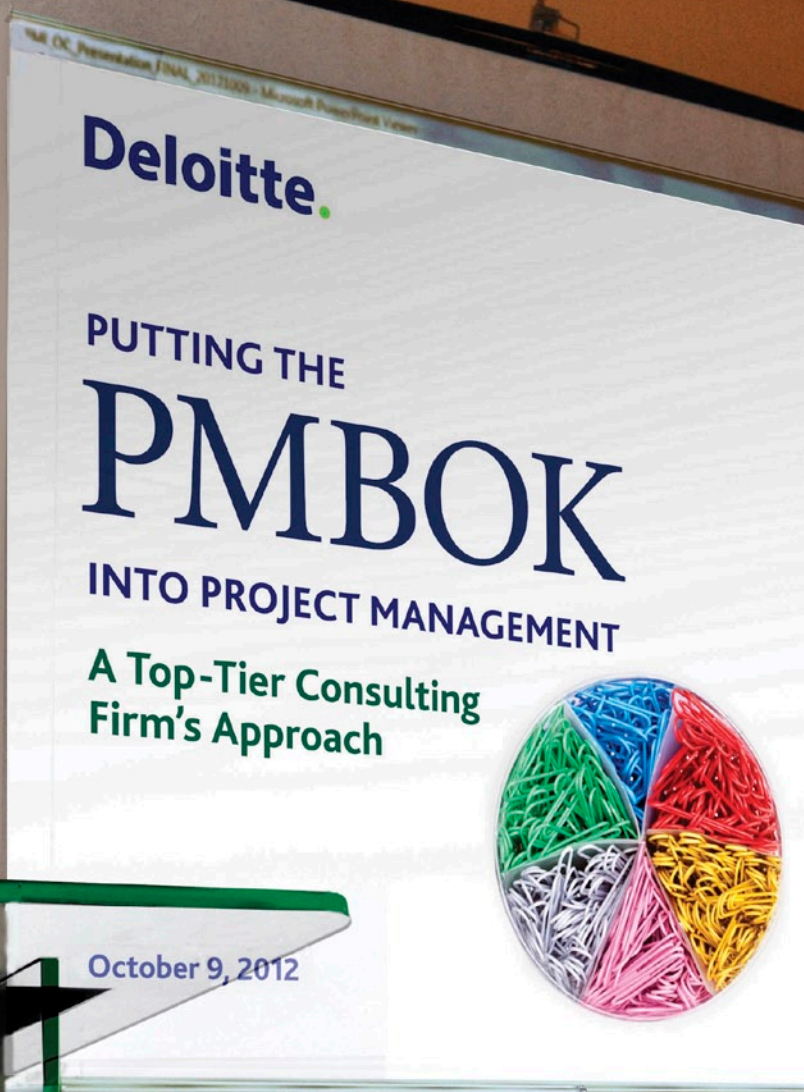


www.pmi-oc.org

www.pmi.org



Rachel Medrano

See October dinner meeting review beginning on [page 8](#).

November 13



Mike Sanders

Multitasking

See page 6. [Click here](#) to register.



2012 Board of Governors

- Gregory Scott, PMP**
President
- Robbin Mackenzie Thomas**
VP of Operations
- Dave Cornelius, PMP**
VP of Communications
- Alvin Joseph, PMP**
VP of Administration
- Cindy Pham, PMP**
VP of Strategic Planning
- Adam Khamseh, PMP**
VP of Finance
- Stephen June, PMP**
Past President

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My message this month is dedicated to the recognition of two of our long term members



and chapter leaders honored at the October dinner meeting with the **2012 PRESIDENT'S AWARD.**

Several months ago, the board of governors and I discussed the best way to celebrate the contributions that these two dedicated individuals have made to our chapter's growth and organization.

I chose to use the President's Award. Although this award normally recognizes some special contribution during the past year, these particular awards are special; they represent long term contributions that provided transformative service to the chapter.

Sylvan Finestone and **Nora Goto** have served in volunteer and leadership positions for many years. Each served in very different ways, Sylvan out front driving organizational improvement and Nora working behind the scenes developing leaders, functional teams, and employing technology.

We were proud to honor Sylvan and Nora at the last dinner meeting. The inscriptions on the presentation plaques and some profiles of their contributions follow. I hope their service inspires many of you to follow in their footsteps.

Sylvan Finestone, PMP

Award presented in recognition and appreciation for your dedication and transformative contributions to the organizational growth and operational leadership with a long term vision for the Chapter."



Sylvan has served PMI-OC since 2002. He immediately became a contributor to the chapter's programs as an instructor for the PMP prep class. Sylvan brought experience from a career in the U.S. Army, followed by a distinguished career as senior manager of a large PMO for the CSC Corporation.

This award is presented in recognition and appreciation for his long term commitment and transformational leadership to the PMI Orange County Chapter. Sylvan's service encompassed many significant areas.

PMInAction: Sylvan helped organize and present a weekend conference. This event served as a model for future career days and also our commitment to the SoTeC joint conference.

Volunteer Coordinator and Director of Membership: Sylvan's efforts in these roles established many of the precedents used in our membership programs today.

The ambassador program was in full gear under his leadership and is a model for our reinvigorated program today. He also established the volunteer of the month and volunteer of the year programs.

President Elect, President and Past President. This area of service is Sylvan's legacy to PMI-OC. Experiencing the challenges of our prior organization, consulting with other chapters and seeking guidance from PMI Global led him to pursue a quantum change in PMI-OC.

In his service as the chapter's executive, Sylvan engaged the leadership to transform the governance structure, through bylaw revision, to a six member elected board of governors to promote a more strategic approach to governing PMI-OC. He led us through the change, mentored new governors, and set a challenging vision to support long term chapter growth and success.

These are only brief descriptions of Sylvan's major contributions over the past ten years. He continues his commitment to the profession as a mentor to leaders of our chapter, is a graduate of the PMI Leadership Institute Masters program, and a local leader for PMI Global.

Nora Goto, PMP

"Award presented in recognition and appreciation for your dedicated operational leadership, the deployment of new technologies and gracious mentoring of our current and future Chapter leaders."



Nora is a health care professional who transformed her career from nursing to organizational change management in the health care industry. Nora currently works at the Veterans Administration, Long Beach in charge of programs to change organizational culture to better serve our veterans. She also continues her commitment to developing professionals by teaching at Cal State Long Beach in their nursing program.

Nora brought her leadership, teaching, and interpersonal skills to PMI-OC in 2007, and in true Nora style, she dove right into the organization. The following are just a few of the major contributions from her years of service.

Director of Administration. Nora initiated programs to collect and compile our operational procedures and establish a collaborative environment for the long term. She collaborated with a new software service, Qtask/Prolific, to provide a no cost collaboration tool. Nora spent many hours on virtual training sessions for our

members to learn how to effectively use this tool.

Director of Communications: Seeing a need for our virtual teams to work together, Nora brought the Webex tool and Accessline phone conferencing on board. These tools have greatly improved our various teams' effectiveness while minimizing volunteers' time away from family.

VP of Communications: Nora established a team to evaluate, select, and implement CRM web based technology for our membership management needs. She also established the new social media team. Other contributions included professional graphic design and editing services, e-publishing, and document management. Nora demonstrated the goal of the new board of governors by delegating the day to day responsibility for chapter operations to her directors. Perhaps Nora's most significant contribution is her ability to identify, mentor, and develop leaders. Her low-key behind the scenes support of individual volunteers is the hallmark of her giving nature.

By establishing focused teams and developing leaders for those teams, Nora has significantly improved the chapter's capabilities to serve its members. Nora continues to mentor our members as they take on new challenges.

Greg Scott, PMP
2012 President

Volunteer Opportunities

New Members

Kamlesh Agnihotri
Issam Ali
Pranesh Amarnath
Tarikere
Lyn Ames
Mikhail Artemov
Pamela Baker
Wendy Brown
Russell Burnham
Mario Bustillos
Rowell Castro
Peter Crosson
Jose de la Fuente
Frederick Donatucci
Audrey Florakis
Kimberly Francia
Jeff Freeman
Michael Fritz
Nader Ghobrial
Eileen Gomez
Joseph Guerrero
Shannon Haas
James Herbert
Wendy Hetu
Frank Kawashima
Heakyung Kim
Dipankar Koyal
Andy Lac
Mary Lano
Diana Lee
Michael Lehman
William Lester
Julie Lichty
Jeanette Lind
Christina Long
Marna Lovelady
Fiona Man

Sesha Mudunuri
Krishnamenon Nadaraja
Cory Nelson
Wilfried Niemann
Ray O'Grady
Krystal Ouren
Valerie Oxford
Kiran Pallachulla
John Pape
John Pavlik
Charles Player
Maria Pope
Larry Quach
Iqbal Rana
Nana Richardson
Raymond Rivera
Jeff Rogers
Crystal Ruiz
Joel Samonte
Meynardo Sanchez
Lily Sandberg
Sam Tieu
Jitendra Verma
Satinder Verma
Jimmy Villalobos
James Volz
Carrie Walsh
Radoslav Wojcik
Ramana Yellapu
Noemi Zajzon

New PMPs

Yuree Han
Murugan Krishnan
Prudence McMaster
Brett Palmer

Administration

NEEDED NOW! Project Manager for Board of Governors Election

Plan, manage, and coordinate the annual election of the PMI-OC Board of Governors. Evaluate and manage the online election systems with third party vendors:

Apply at pmi.org. Click on: <https://vrms.pmi.org/OpportunityView/OpportunityView/?Opid=563>

Operations

Program Director

Implements meetings and events that support the strategic direction of PMI-OC. Schedules and coordinates all meetings offered to PMI-OC membership and the community at large, including monthly dinner meetings, breakfast meetings, and other events depending on membership needs. Builds alliances with other PMI components and professional organizations for sharing speakers and meetings.

Apply at pmi.org. Click on: <https://vrms.pmi.org/OpportunityView/OpportunityView/?Opid=526>

Agile Training Program Coordinator/Chair

Need team leaders to launch a new quarterly Agile training program similar to the PMP Exam Prep.

Please contact: Robbin.Thomas@pmi-oc.org

Membership

Volunteer Coordinators

JOIN THE TEAM! Virtual and on location volunteering

Solicit new volunteers and collect volunteer information from dinner meetings, ATS, and member orientation.

Or, work closely with volunteer chair and BOD to create a stream of new members.

Or, prepare classified ads for the PMI-OC website and *Milestones*.

Ambassadors

Welcome new members, visitors, sponsors, and existing members at PMI-OC events. Inform first time attendees about chapter activities, programs, and benefits.

Follow up and encourage them to attend future events.

Please contact volunteerchair@pmi-oc.org

Social Media

If you are interested in working with our social media channels, Facebook, LinkedIn or twitter:

Please contact Dave.Cornelius@pmi-oc.org

Communications

Photographers and Writers for our *Milestones* magazine

Event discounts available.

Please contact Dave.Cornelius@pmi-oc.org

[Click here](#) for more information.

NOVEMBER 3

Bridging the Gap to Success

USING PROJECT MANAGEMENT
AND SIX SIGMA METHODOLOGIES



Carolyn Wong and Joe Paradiso

Carolyn is an accomplished PMP with over 12 years of experience. Adept at applying project management, Six Sigma, and business process management methods and tools in a wide variety of industries, Carolyn's expertise includes project planning and mapping of business processes to control metrics and assure project success.

Joe's background is in aerospace and high technology industries, where he worked as an electronic technician, cost estimator, project manager, and project management instructor. Joe has held PMP and Six Sigma certifications since 2005.

Joe was also PMI-OC Membership Director for two years.

Topics:

- Understanding the similarities and differences between project management and Six Sigma
- Become familiar with Six Sigma tools and applying them to projects.
- DMAIC: the project management approach of Six Sigma
- Lean Six Sigma tools: Ishikawa Fishbone Diagram, SIPOC, Kaizen,
- Process flow diagram: symbols, current, and "to-be."
- MS Project schedule of a Lean Six Sigma project
- Effectively using a FMEA in an example
- Example of effectively using a process flow.

At Vanguard Univ., Costa Mesa

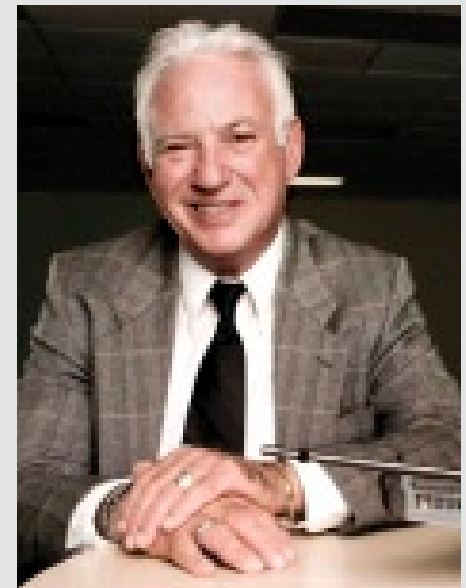
[Click here](#) for November 3 details and registration.

Four PDUs for each seminar

[Click here](#) for December 8 details and registration.

DECEMBER 8

HOW TO ACHIEVE Consistent Project Success



Marty Wartenberg

Marty is currently chief inventor for Zero Boundary, a San Diego based training and software company, and has held various executive and project and program management positions in high technology industries.

Marty has taught project management and systems engineering through the University of California system, is a former chapter president, and was named a PMI-OC Fellow in 2005.

By the end of the seminar, you will be able to identify critical success factors, remove barriers to successful completion, and plan a successful project.

Mike Sanders



ADVANCED

Multitasking

Mike Sanders, PMP is an IT Manager at Southern California Edison (SCE). Mike has shared his unique expertise in advanced multitasking with numerous organizations, including PMI Inland Empire, Los Angeles, San Diego, and Los Padres chapters; IIBA Orange County Chapter, SCQAA Orange County and Inland Empire chapters, and the Naval Weapons Center at San Diego.

Mike has also been a speaker at the Southland Technology Conference (SoTeC) and PMI conferences in San Diego and Orange Counties.

BEYOND EMOTIONAL INTELLIGENCE

Multitasking seems to be a required skill in today's highly-tasked, fast-paced workforce. In fact, if you're not multitasking, there must be something wrong with you; you're not perceived as a high achiever!

Mike Sanders will talk about multitasking as you have never heard it before: how it really works, what it can do "for" you and what it can do "to" you,

Mike will present research about multitasking, discuss proven methods and tools to improve task performance, and define measurements for "advanced" multitasking or "powertasking" in today's complex workplace.

You will see how multitasking affects your four brains (yes, four) and how you can maximize task output, work fewer hours with less anxiety, and have more fun.

This is powerful material, so get ready to explode onto the work scene with new tools the very next day!

Can you handle even more success? Mike's presentation will include laminated quick reference wallet cards and a link to the advanced multitasking website with the presentation and free multitasking tools.

[Click here](#) to register.

Social Media Team



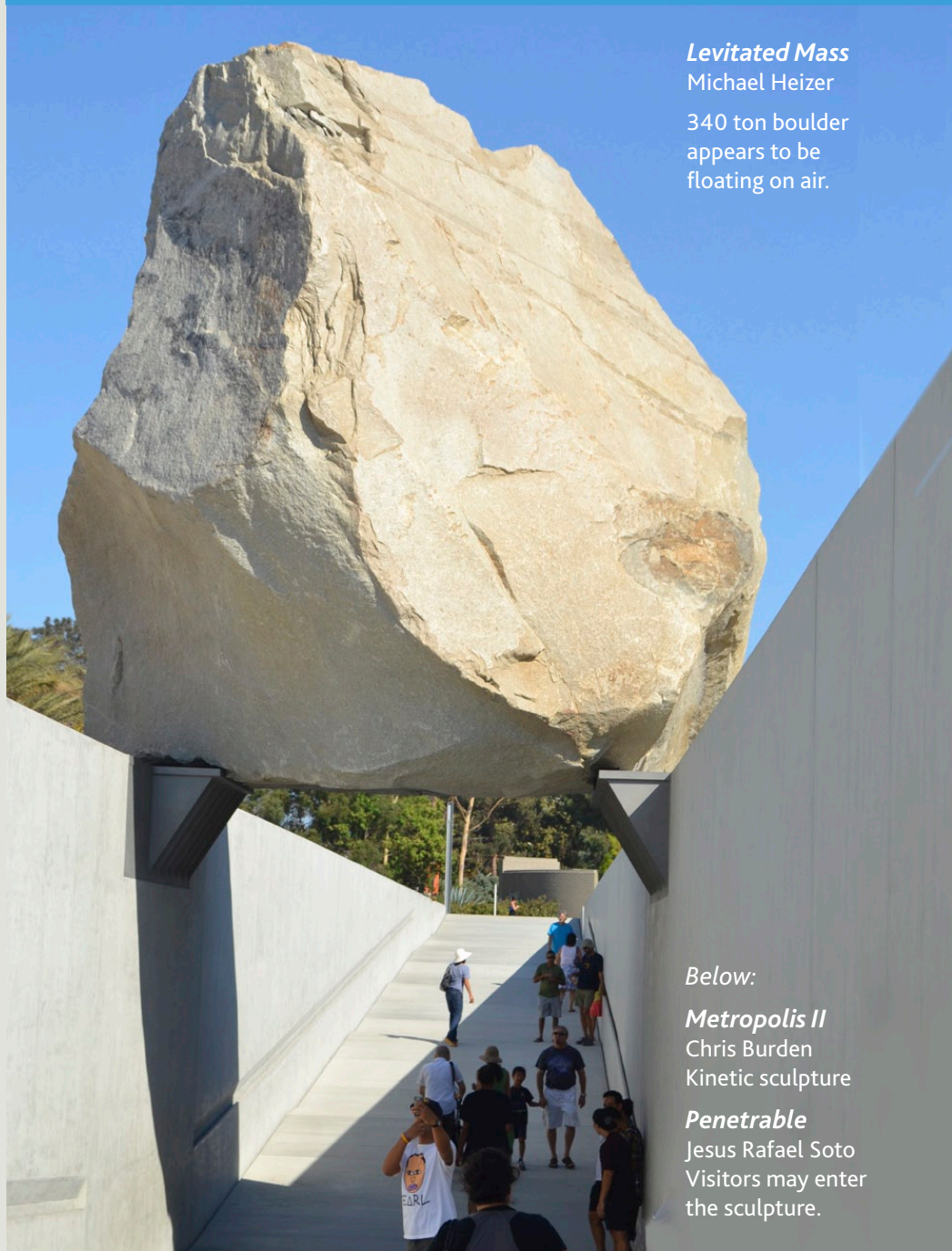
On Sunday, September 23, the PMI-OC Social Media Team enjoyed a quarterly outing at the Grove in Los Angeles and The Los Angeles County Museum of Art (LACMA).

After lunch at The Cheesecake Factory, the team visited nearby LACMA, where they viewed some amazing contemporary sculpture.

Below, left to right: New Social Media Chair Bryan Whited, Stacey Hutzler, Dave Cornelius, Karen Aalders, Diana Wei, Deborah Cantwell



Learning, Serving, and Leading with PMI-OC



Levitated Mass
Michael Heizer
340 ton boulder appears to be floating on air.

Below:
Metropolis II
Chris Burden
Kinetic sculpture
Penetrable
Jesus Rafael Soto
Visitors may enter the sculpture.



Putting the **PMBOK** into Project Management

A Top-Tier Consulting Firm's Approach

Thanks to everyone who attended our monthly dinner meeting in October. We hope you enjoyed yourselves and took away something valuable. For those who were unable to attend, here are some meeting highlights.

a framework-driven project management method, Deloitte used a combination of the *PMBOK® Guide, Fourth Edition* framework, and the capability maturity model Integration

After her presentation and a short Q & A session, Rachel suggested the following take-aways to foster adoption of your project management method, regardless of your specific framework.



RACHEL MEDRANO, PMP from Deloitte Consulting was our guest speaker. Rachel's presentation was part of PMI-OC's project success theme.

Rachel painted an informative and enlightening picture of how Deloitte Consulting (currently 182,000 professionals strong) has successfully implemented

(CMMI) framework, for successful project completion.

Rachel drove home the fact that in a world where teams are increasingly embracing Agile principles, the *PMBOK® Guide* and CMMI frameworks are alive and well and still used globally to successfully implement various types of technology projects.

1. Leverage the PMBOK framework, or whatever framework you use, with a focus on usability, efficiency, and adoption.

Usability means ensuring that the end users (your project managers) actually receive what they need, as opposed to what they want, and that they can actually "use" the method.

Efficiency refers to ways in which activities and tasks can be executed more efficiently in terms of the “iron triangle” of constraints always in the front of each team member’s mind.

Of course, these are cost (budget), scope (requirements), and time (schedule), but also include quality and client satisfaction.

Adoption refers to the importance of realizing that even if you have a valid framework that will ensure project success, you must also communicate the “value proposition” of adopting this framework to all project stakeholders, so that they are fully on board with it.

2. Always support project Implementation with the right coaching and training.

Project success requires that you take time to mentor, coach, and train your project team members when rolling out your project management method.

By spending the extra time during the project to help each individual project team member become more productive in the things they do best, as well as in the things that they need to learn to do, you automatically increase the probability of success for not only your current projects, but also for all future projects in which these team members are engaged.

3. Continuously Improve. This is critical in all implementations; there are no exceptions.

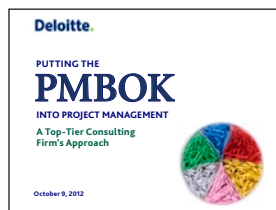
Since the inception of the PMBOK framework, continuous Improvement has been identified as a key ingredient in the recipe of all successful projects. Although this has never been spelled out as a specific “process” in the PMBOK framework of process groups, knowledge areas and processes, it is emphasized throughout the PMBOK framework as an integral part of all project activities.

It is critical to nurture a feedback loop between your PMO from the various projects in your organization in to successfully execute them.

Thanks again to Rachel Medrano for her continued support of PMI-OC and all Southern California PMI chapters.

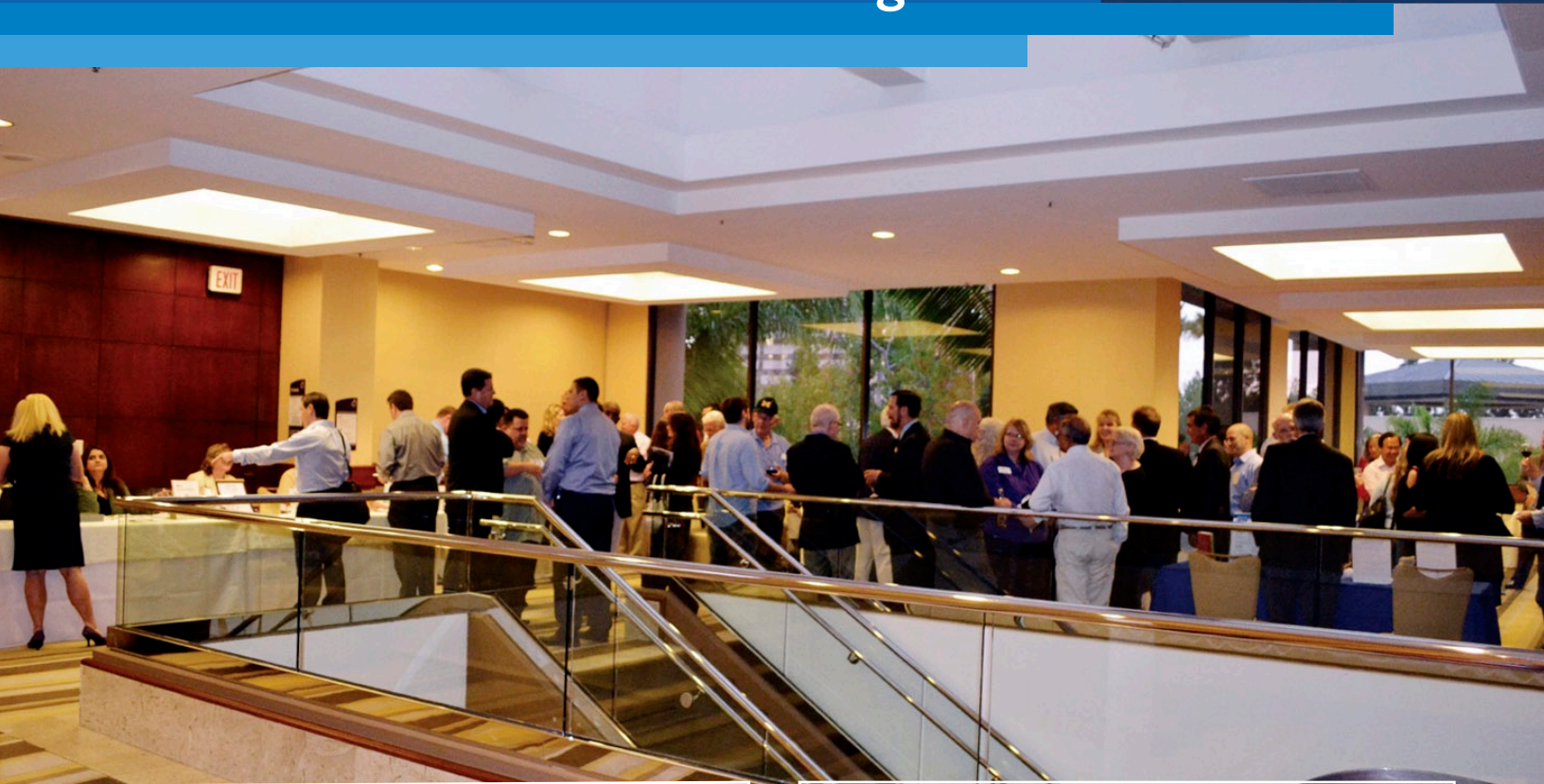
If you would like a complete copy of Rachel’s presentation, [click on the image below](#).

Kevin W. Reilly, PMP



Sylvan Finestone, Starbucks
Michael Strohmeier, Amazon
Mitra Boyd, Amazon
Ellen Fassler, PM PrepCast

At the October 9 Dinner Meeting



Arriving and networking

Volunteer Chair Lisa Hazelton and Membership Director Ragu Kuppannan present October Volunteer of Merit award to Stacey Hutzler.

New PMPs Lei Wang, Swarn Matharu, and Minh Nguyen

Membership Director Ragu Kuppannan presents September Volunteer of Merit award to Karen Aalders at the September 11 conference.

Photos by Diana Wei



Employment Opportunities

The Word & Brown Companies, headquartered in Orange, CA, provide innovative technology, health benefit plan models, and employee benefit services, through 50,000 brokers, to nearly 60,000 employers. Positions currently available at the Orange, CA headquarters:

IT Administrative Assistant 1

One position available

Executive Assistant

One position available

Technical Recruiter

Two positions available

Implementation Software Delivery Director

One position available

Product Software Delivery Director

One position available

Senior Net Developer Lead

One position available

Marketing - Event Administration Coordinator

One position available

Marketing - Director Web Marketing

One position available

IT - Net Developer

One position available

Finance - Trust Accountant

One position available.

Finance - Quality Control Specialist

One position available

Finance - Accounts Receivable Administrator

Two positions available

Market Development Specialist

One position available

Email Marketing Communications Specialist

One position available

Senior Network Engineer

One position available

Technical Writer - Senior

One position available

Technical. Writer - Junior

One position available

IT -Enterprise Services CRM Specialist

One position available

Enterprise Business Solutions Specialist

One position available

HIX CRM Specialist

One position available

IT - Senior Database Engineer

Four positions available

IT - Development Scrum Master

Two positions available

IT - Business Analyst

One position available

Enterprise Business Solutions Specialist

One position available

UX Designer-Developer

One position available

Senior Net Developer

Four positions available

Group Processing Coordinator

One position available

[Click here for more open positions.](#)



To learn more about these or other open positions, contact Elida Flores, eflores@wordandbrown.com.

Next PMI-OC
Orientation Meeting
November 21, 2012

Welcome
to the Project
Management Institute-
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.

When:

Wednesday

November 21, 2012

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:

Brandman University

16355 Laguna Canyon Road

Irvine, CA 92618

Cost:

None. Parking is free.

Questions:

membership@pmi-oc.org

Check www.pmi-oc.org
for more information and
to register.

IMPLEMENTING Project Portfolio Management PART TWO



ANDY ANDERSON and ALEX BRADLEY from Agile Leadership returned as promised during the June ATS, to deliver Part II on how to implement governance to support project portfolio management (PPM).

Please see the July Milestones article summarizing the Part I June material.

The audience was impressed to hear, that thanks to his deep conceptual understanding, Andy continues to contribute to PMI's many editions of *Portfolio*



Management Standards. In addition, attendees benefitted from Andy's unique PPM experience at Alcon, where his small team oversees 400 projects valued at over \$900M, with review by four separate governing bodies.

After a lively and interactive introduction period, Andy gave a short refresher on the PPM Part I materials, reemphasizing that PPM is not about the tactical goals of projects being on-time, with quality, within budget. Rather, it focuses on ensuring that corporate investment return is maximized by working on the right projects at the right time.

His overview of the *PMI Standards for PPM* showed attendees how timely, iterative processes are necessary to inform the governance teams about portfolio project performance and value in comparison to corporate strategic plans, and risk tolerance, as well as the supply and demand of funding and resources.

To set up these processes and the enabling systems to support them, Andy asked the attendees to focus first on cherry-picking from "best" practices to find an

approach that fits the business, since there are none that work across-the-board for all cases. Second in sequence, but perhaps first in terms of importance, is to acquire executive support, since strategic decision-making must

surement framework must be approved by the business so projects may be compared with agreed-to criteria. The criteria (and how to measure them), cover impacts on the customers, in-house teams, future markets

The system that is being implemented at Alcon is the Planisware software, and Andy gave a live demonstration on how it is being used to help measure and control the processes for PPM. At Alcon, like at many large companies, the executives have no way of knowing who is doing their job. PPM teams must take great care in making sure that accurate data is put into the software in a timely manner because the reporting impacts careers as well as funding on projects and programs.

Andy knows that we, like himself, are all very busy project managers, but he encouraged us to consider the *Kingdom of Heaven* movie quote, "What is a man who does not make the world a better place?"

He challenged the attendees to take the time to remember the first three rules in project management. The first rule is to focus on "people, people, people."

The remaining two are "trust, then verify," and "get 'er done." Well said, Andy.

James L. Morin, PMP

Photos by
Alfredo Garcia



be top-down to be effective. Next, the governance structure must be put in place with the focus on decision-making. At a minimum, the governing body members should include executives to ensure project alignment with business objectives, functional management to empower program delivery, and project team members to ensure individual project success.

Before the processes and systems can be put in place, Andy stressed that a value mea-

and technologies, regulatory approvals, and the usual financial measures such as profit, market share, ROI, and payback period.

Andy showed the attendees many different examples of reports, charts, graphs, and diagrams that are used as decision-making tools to rank projects by various categories. He told several stories about the ebb and flow of entrepreneurial spirit as it relates to trade-offs against risk on projects, and the audience members added their experiences to the discussion.

Lend a Helping Hand

PROJECT MANAGEMENT FOR SOCIAL GOOD

ROCKHARBOR Back to School Drive

Costa Mesa, California

By Dave Cornelius, PMP PMI-ACP

Recently, I met with Justin Fox, ROCKHARBOR Costa Mesa City Pastor, to gather insight into the church's back to school drive. The economic downturn has impacted schools everywhere. Teachers are purchasing classroom supplies, and students are returning to class without the tools to succeed.

ROCKHARBOR partnered with Costa Mesa schools in Costa Mesa to make a difference by reducing the financial burden on teachers and equipping students with basic school supplies.

What was your role in this project?

I played a leadership role from concept creation to delivering backpacks and boxes, as well as building relationships with schools and teachers.

How was this vision created?

We have a tradition of implementing community-focused projects year round. We provide care packages at Christmas and meals at Thanksgiving. We considered donating money, but decided to ask schools what they needed and invited our church community to purchase supplies, a tangible blessing for students and teachers.

What problems did you see that required action?

Many students return to school without the supplies or backpacks needed to succeed. We felt that providing supplies to students would encourage them academically. We also wanted to support

teachers and reduce their financial burden.

Who defined requirements for the project?

Our local outreach Director Kelly Casiocatta decided we should purchase backpacks for students and prepare appreciation boxes for teachers.

How did you know what was needed to fill the backpacks?

We worked with school principals and other churches to determine quantities and created an inventory list that could be used when shopping for supplies. The goal was to fill 1,000 backpacks and 200 teacher boxes.



How was this planned and organized?

We designated a patio for pick up and drop off, including collection bins and tables staffed by volunteers. We also used print materials, our website, social media, and e-bulletins to create awareness

To manage the process, each backpack and box had a supply list, tracking number, and code for teacher/student and school level. People provided contact information when they picked up a back-

pack or box, which was associated with a tracking number and enabled us to monitor fulfillment.

We focused on the start of school between August 5–25. We dispersed empty backpacks and boxes, collected supplies, and delivered them to schools. Teachers received boxes before school and students received backpacks on the first day of class.

What is the estimated value of this project?

Priceless! The value was estimated at \$18,000 for backpacks and \$5,300 for teacher boxes.

What are the lessons learned from this project?



We motivated many people to work on small things versus a small group to work on a larger initiative. The interface with the backpack, supply list, tracking number, and volunteer team was effective, as well as the engaging patio design,.

What was the goal for this project?

We wanted to build lasting relationships with administrators, teachers, and students in our community. We also wanted our service to be an example of the gospel at work in a tangible way.





OC Project Masters Toastmasters Area C-4 Speech Contest Winners

Dave Cornelius, MBA, PMP, PMI-ACP

Winner, winner, chicken dinner!

On Saturday, October 6, Siva Tottikalai won first place, and Enrique Viloría won second place in the Toastmasters Area C-4 Evaluation and Humorous Speech Contest respectively.

Siva will go to the Division C contest Saturday, October 13, and will compete against other Area C winners.

Division winners will then compete at the district contest in November.

leadership skills. At OC Project Masters, you can increase communication skills and leadership capabilities by regularly practicing public speaking and receiving constructive feedback.

The OC Project Masters Toastmasters Club is part of the PMI-OC family. PMI-OC supported its launch in 2010, and the club has since achieved the highest honor of President's Distinguished Club two years in a row.



Dave Cornelius, Area C-4 Governor John Ngo third place, Diana Tran second place, Siva Tottikalai first place winner, Jack Schmidt Division C Governor



OC Project Masters members: Siva Tottikalai, Enrique Viloría, Gary Cohen, Jerome Rowley, Dave Cornelius, and Patrick Ricardo

Siva Tottikalai has grown as a past volunteer for the communications outreach team and now is an officer for the OC Project Masters. Please congratulate Siva the next time you see him at a PMI-OC dinner meeting.

The Project Management Institute—Orange County Chapter (PMI-OC) and OC Project Masters are committed to increasing your

PMI-OC and OC Project Masters share members and support each other's events. At the monthly dinner meeting, you will find an OC Project Masters member serving as the master of ceremony.

To learn more about OC Project Masters, [see page 24](#) and visit ocprojectmasters.org,

Meetings are held each Monday, except the third Monday of the month, from 7– 8:30 p.m.

The Project Leadership Panel



FRANK REYNOLDS

An Interview with
Dave Cornelius, MBA, PMP, PMI-ACP

Frank “Mr. CAP-M” Reynolds is one of the founders and 2006 Fellow of the Project Management Institute - Orange County Chapter. Frank is co-author with Diane Altwies of “Achieve CAPM® Exam Success: A Concise Study Guide and Desk Reference” (based on the PMBOK® Guide, Fourth Edition).

Frank and I recently discussed his years of project management experience, and his latest work, “Many Streams Make a River—An Approach to Career Enrichment.”

You have been involved with the Project Management Institute project leadership practices for some time. How would you describe project leadership?

Project leadership is a facilitative activity. Project teams should have all the skills necessary to produce the project result. It is important to get teams involved in the realization of promised values attending the expenditure of scarce capital. This includes people who are involved months and years after project implementation.

What do you think is the most important project leadership characteristic?

It would be the commitment of the project manager and project participants to the development of deliverables associated with the project’s targeted completion. Realizing the benefits that come from successful project completion is also critical.

Your focus has been on the Certified Associate in Project Management (CAPM) certification and training, which is designed for aspiring project managers and project participants. Can people with the CAPM also demonstrate project leadership?

A project participant with a CAPM designation must demonstrate project leadership. The CAPM is often viewed as preparation for becoming a certified project manager. However, many people involved with projects do not aspire to management. They focus on creating products, systems, and knowledge that are valuable to their colleagues. Leadership doesn’t happen just at the top. It also includes people focused on design, testing, fabrication, integration, and benefit realization. The PMBOK discusses project teams with members responsible for scope, quality, budget, schedule, resources, and risks.

Do you see a transformation of project leadership into a team-based or groupthink activity versus a responsibility assigned to a single person?

Groupthink is oxymoronic, suggesting that people work in a collaborative way. There is a European joke about the United States. They say, “You get people together in Italy and they fight over cooking. When Brits gather, they fight about soccer, but when Americans gather, they form committees.” Unfortunately, committees are not always functional. Project leadership must transform into a collaborative activity because there is so much going on with technology, cultures, and projects. People need to work together carefully and use different tools and approaches to be successful.

What advice would you offer to an aspiring or existing project manager about project leadership?

In one way it’s “Lead, damn it!” At Bell Labs. I saw individual project participants volunteer to lead when the project manager was not around. Project managers need to distribute leadership among all project participants, especially those who are going to be substantially changed by the realization of the benefits.

Learning, Serving, and Leading with PMI-OC

PMI-OC is dedicated to professional development and networking opportunities for project managers and project participants. As part of our work, we are introducing a new leadership pathway that can transform individual project managers and benefit the organizations with which they are associated—their place of work, PMI-OC, and even PMI Global.

PMI-OC Value Learning, serving, and leading are cornerstone principles of PMI-OC. Based on these values, we have had great success, including:

- 23 years of service
- PMI Global Chapter of the Year Award
- 1,700 members
- Most members are certified professionals
- Second largest chapter in California
- Fourth largest chapter in Region 7
- One of the top 50 global chapters
- A community of experiential leadership and communication opportunities

We are proud of the volunteers at PMI-OC whose leadership has had significant impact at PMI-OC and beyond. The following testimonials show why members value their leadership experiences with PMI-OC.

Transformed Leaders



Kristine Munson
PMI-OC Fellow

"I attribute my current professional success to my PMI-OC volunteer leadership experience. As a volunteer, I improved my basic project management skills and developed leadership skills in a safe environment. These experiences prepared me to seize similar opportunities professionally. Along the way, I met other PMI-OC members who remain my mentors and friends."

Cornelius Fichtner
PMI-OC Fellow

"When I joined PMI-OC, I was just your average project manager. The encouraging environment of the chapter allowed me to take on one leadership role after the other, all the way up to chapter president. This gave me the opportunity to learn about, practice, and improve my leadership skills, culminating in the launch of my own project management training company."

Dave Cornelius
VP Communications 2012

"Participating as a PMI-OC volunteer gave me confidence and a place to belong during my period of employment transition. I was introduced to the OC Project Masters Toastmasters Club, a PMI-OC affiliate, which gave me a voice to speak and write publicly for the first time. It has been an amazing opportunity to learn, serve, and lead without the fear of failing."

Nora Goto
VP Communications 2011

"I was often asked, 'Why do you volunteer for PMI-OC?' The answer always was, 'For learning and personal growth.' Most of us are not born perfect leaders. Improved leadership abilities come with greater experience. Leading and working with others in a volunteer environment created more opportunities for learning, developing self awareness, and building social skills."

Diana Wei
Director of Social Media

"If you asked me three years ago how long I planned to stay with PMI-OC, I would have said just long enough to attend some meetings now and then. Little did I know, I would become involved in over seven different positions and now serve as the Director of Social Media. If not for PMI-OC, I would not have gained the leadership skills and project management insights that I use today."

Next >>

We are excited to introduce our Learning, Serving, Leading progressive pathway for project managers. The following table outlines the many opportunities to learn, serve, and lead at both PMI-OC and PMI Global.

Your Progressive Elaboration Experience

		Build		Advance
		Start		
PMI-OC	Learning	<ul style="list-style-type: none"> • New Member Orientation • PMP Prep Class • OC Project Masters Toastmasters Club • Bi-monthly Networking Events • Annual Project Management Conference 	<ul style="list-style-type: none"> • Monthly Dinner Meetings • Webinars • Podcasts • Annual Project Management Conference 	<ul style="list-style-type: none"> • Advanced Topic Seminars • Leadership Seminars • Annual Project Management Conference
	Serving	<ul style="list-style-type: none"> • Volunteer Entry Level • Annual Spark of Love Toy Drive • Contribute to our social media groups 	<ul style="list-style-type: none"> • Volunteer Chair • Volunteer Mentor • Lend a Helping PM Hand 	<ul style="list-style-type: none"> • PMI-OC Board of Governors • PMIEF Liaison
	Leading	<ul style="list-style-type: none"> • Volunteer Writing • Special Event Lead 	<ul style="list-style-type: none"> • Volunteer Teaching • Annual Project of the Year Award • Event Master of Ceremonies • Volunteer Director 	<ul style="list-style-type: none"> • Volunteer Speaking • Volunteer Board of Governors
PMI Global	Learning	<ul style="list-style-type: none"> • New Membership • Join PMI-OC • PMP Certification 	<ul style="list-style-type: none"> • Download Congress Papers 	<ul style="list-style-type: none"> • Leadership Institute Meeting (LIM) • Region 7 Meeting
	Serving	<ul style="list-style-type: none"> • Contribute to PMI LinkedIn and Facebook groups 	<ul style="list-style-type: none"> • Volunteer PMI Global 	<ul style="list-style-type: none"> • PMIEF
	Leading	<ul style="list-style-type: none"> • Start an exam prep study group for CAPM or PMP 	<ul style="list-style-type: none"> • Join a Community of Practice 	<ul style="list-style-type: none"> • PMI Master Leadership • Lead a Community of Practice • Chair a Committee • PMI Board of Directors

Take Your First Step Today

Please visit www.pmi-oc.org for information about professional development activities, news, and events.



EVERYTHING ABOUT PDU CATEGORY C.

As the holder of a PMI credential (except CAPM), you are required to earn a specified number of professional development units (PDUs) to maintain that credential. PMI has developed six categories of PDUs in which you can obtain credits. In October *Milestones*, we reviewed the first two categories (A and B) and gave you our insights.

In this issue, we will complete the series with categories C through F.

Category C, Self-Directed Learning

Category C covers “self-directed personalized educational experiences involving individual research or study.” Or, in simpler words: self-directed learning.

This category can include reading credential related articles, books, or instructional materials; utilizing interactive CDs; credential related videos or podcasts; formal credential related discussions with others such as coworkers, consultants, or clients; or being mentored by a colleague, coworker, or consultant in a credential related topic.

One way that our company supports you in earning free PDUs in this category is through The Project Management Podcast. It’s completely free and enables you to earn PDUs “on the go.” [Click here](#) to see how this works.

Each hour of activity and each PDU claimed must be related to the area of project management, program management, project scheduling, or project risk; meet a specific purpose; and use well-informed resources.

One hour of self-directed learning is equal to one hour of professional development.

A maximum of 30 PDUs for Category C can be reported toward the PMP or PgMP credentials, or 15 toward the PMI-SP or PMI-RPM credentials over the three year cycle.

To claim a PDU in Category C, you need to provide evidence of the accomplished activities for self-directed learning. This may include copies of research or study results, or dates and notes corresponding to discussions, readings, and mentorships.

EVERYTHING ABOUT PDU CATEGORY D

We have concluded our review of the “educational” PDU categories and we are now moving into category D, the three “giving back to the profession” groups of PDUs.

Category D, Giving Back to the Profession

Please note that there is a maximum of 45 PDUs that you can earn in the “giving back” division. This means that you can earn a maximum of 45 PDUs for categories D, E, and F combined.

Category D covers the development of new knowledge related to the specific credential where the PDUs are to be applied.

You can earn category D PDUs by authoring or co-authoring a project management textbook, a peer-reviewed or non-peer reviewed article, or an article for the PMI knowledge shelf. You can also author a credential related article for an electronic newsletter or a blog for an official organization, professional organization or company. You can present credential related material in a webinar or podcast or develop or serve as an instructor for project management related course material, or serve as a moderator for a related discussion, or participate as an expert on a panel.

For each hour committed to knowledge development in the areas of project management, program management, project scheduling, or project risk, one hour of professional development can be claimed and awarded as a PDU. Additionally, all of the time you commit to gaining



Bachan Anand

this knowledge, whether it is for preparation, creation, or presentation, can be claimed toward PDUs in this category. So if it takes you three hours to prepare and two hours to present, then you have earned five PDUs.

Should you be audited for claiming these types of PDUs, you will need to provide documentation of your activities.

EVERYTHING ABOUT PDU CATEGORY E, Voluntary Service

Again, remember that you can earn a maximum of 45 PDUs for Categories D, E and F combined.

Category E covers volunteer (non-compensated time) service activities in the areas of project management, program management, project scheduling, or project risk. Volunteer service activities include serving as a volunteer, an elected volunteer officer, or appointed member of a committee for a PMI organization such as a PMI chapter or community of practice, or other documented charitable or non-profit organization providing PM related services.

Essentially this category allows you to earn PDUs by volunteering your time and utilizing your project management knowledge to help others.

For each hour spent as an unpaid volunteer in these areas, one hour of professional develop-

ment can be claimed and awarded as a PDU.

If you are audited, you will need documentation to prove that you have earned these PDUs.

EVERYTHING ABOUT PDU CATEGORY F

Category F covers earning PDUs by working as a professional in project management.

Basically, Category F allows you to earn PDUs based on your employment if you are working for at least six out of 12 months as a project manager, so you are getting free PDUs just for doing your job!

For Category F, a holder of either the PMP or the PgMP credential can earn a total of five PDUs per 12 month period or a total of 15 PDUs per three cycle. A holder of either the PMI-SP or the PMI-RMP credential can earn a total of two and a half PDUs per 12 month period or a total of seven and a half PDUs per cycle.

To defend PDUs in category F during a possible audit, you need to provide verification of employment and job description.

This concludes our series of PDU tips, in which we looked at the six PDU categories. If you have any questions please write to ask.cornelius@pdu-insider.com, and we will respond.

Cornelius Fichtner, PMP
PMI-OC Fellow

Top Ten Failure Modes of a Product Owner

What are the top ten failure modes of a product owner? In other words, what are the mistakes a product owner is very likely to make, and should learn to avoid?

If you are a product owner or hope to be one, here are some of the mistakes you should avoid.

1. Focusing on people instead of on the product
2. Inability to manage stakeholder expectations
3. Failure to communicate the product vision to the team
4. Failure to communicate the reality to stakeholders
5. Disconnection from the team
6. Unbalanced level of involvement in the project
7. Unavailable to the team
8. Lack of understanding of the customer's needs
9. Lack power to make decisions
10. Failure to prioritize and refine customer needs

Click here to learn more about what Bachan Anand has to say about this topic and also to provide your feedback.

www.agilistapm.com



Financial Planning

HELPING YOU SEE THE BIG PICTURE



Do you picture yourself owning a new home, starting a business, or retiring comfortably? These are a few of the financial goals that may be important to you, and each comes with a price tag attached.

That's where financial planning comes in.

Financial planning is a process that can help you reach your goals by evaluating your whole financial picture, then outlining strategies that are tailored to your individual needs and available resources.

Why is financial planning important?

A comprehensive financial plan serves as a framework for organizing the pieces of your financial picture. With a financial plan in place, you'll be better able to focus on your goals and understand what it will take to reach them.

Common financial goals

- Saving and investing for retirement
- Saving and investing for college
- Establishing an emergency fund
- Providing for your family in the event of your death
- Minimizing income or estate taxes

One of the main benefits of a financial plan is that it can help you balance competing financial priorities. A financial plan will clearly show you how your financial goals are related. For example, how saving for your children's college education might impact your ability to save for retirement. Then you can use the information you've gleaned

to decide how to prioritize your goals, implement specific strategies, and choose suitable products or services. Best of all, you'll have the peace of mind that comes from knowing that your financial life is on track.

Financial planning process

Creating and implementing a comprehensive financial plan generally involves working with financial professionals to:

- Develop a clear picture of your current financial situation by reviewing your income, assets, and liabilities, and evaluating your insurance coverage, your investment portfolio, your tax exposure, and your estate plan.
- Establish and prioritize financial goals and time frames for achieving these goals.
- Implement strategies that address your current financial weaknesses and build on your financial strengths.
- Choose specific products and services that are tailored to meet your financial objectives.

- Monitor your plan, making adjustments as your goals, time frames, or circumstances change.

Some members of the team

The financial planning process can involve a number of professionals.

Financial planners typically play a central role in the process, focusing on your overall plan and often coordinating the activities of other professionals with expertise in specific areas, such as accountants and tax attorneys, estate planning attorneys, insurance professionals, and investment advisors.

However, the most important member of the team is you.

Bernd Steinebrunner, CFP
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See ad on page 22.

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OC PROJECT MASTERS

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- **Lead**
- **Serve**
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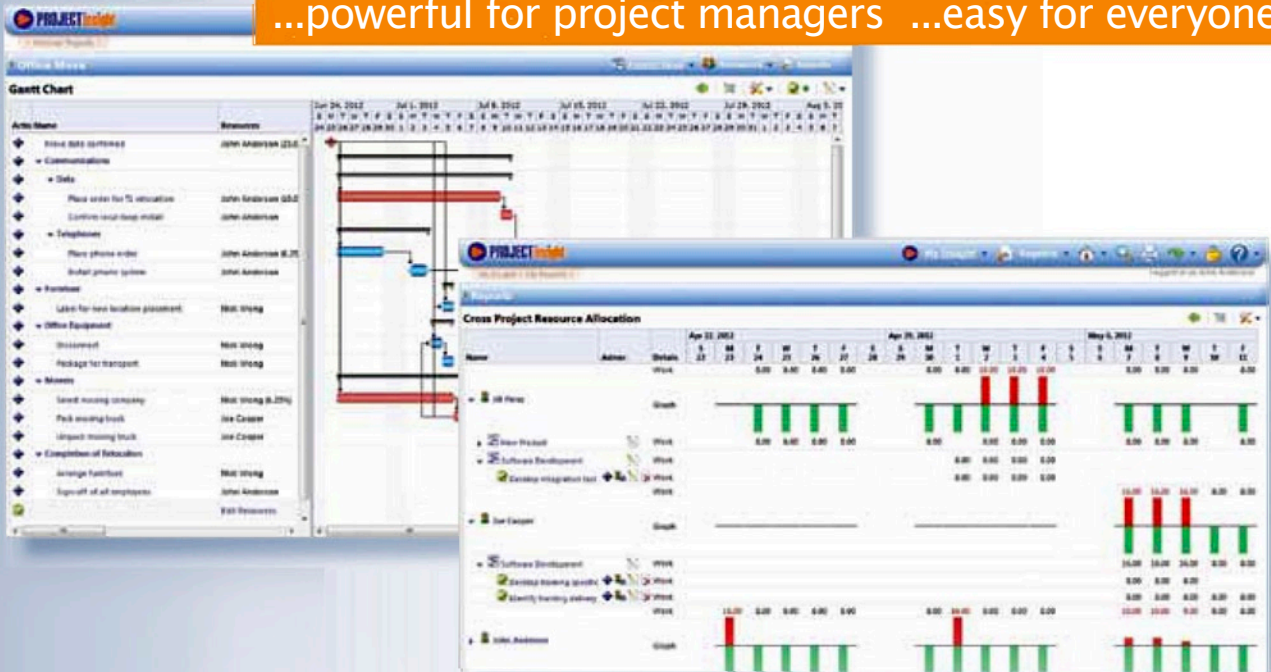
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Nov 03 Advanced Topic Seminar

Carolyn Wong and Joe Paradiso
"Bridging the Gap to Success Using Project Management and Six Sigma Methodologies." See page 5.
[Click here](#) to register.

Nov 03 NEW: Career Workshop

Session 1 "Strategic Career Search Strategies." At SMCI in Costa Mesa.

Nov 05 OC Project Masters Meeting

Weekly meetings: Mondays, 7:00 pm at Carrows in Huntington Beach. No meetings on third Monday of the month. See page 24.

Nov 12 OC Project Masters Meeting

Nov 13 Dinner Meeting

Mike Sanders
"Advanced Multitasking"
See page 6.
[Click here](#) to register.

Nov 17 Career Workshop

Session 2 "Interactive Resume Workshop." At SMCI in Costa Mesa.

Nov 21 Member Orientation

At Brandman University.
See page 11.

Nov 26 OC Project Masters Meeting

Dec 01 Career Workshop

Session 3 "Quarterly Career Achievements." At SMCI in Costa Mesa.

Dec 08 Advanced Topic Seminar

Marty Wartenberg
"How to Achieve Consistent Project Success." See page 5.
[Click here](#) to register

Dec 03 OC Project Masters Meeting

Dec 10 OC Project Masters Meeting

Dec 11 Dinner Meeting

Spark of Love Toy Drive and Holiday Party

Dec 15 Career Workshop

Session 4 "Build Career Portfolio."
At SMCI in Costa Mesa.



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