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Life Cycle: Closure – with a bang not a whimper



Richard A. Unis
President, RA Unis & Company, Inc.

Editor's note: The following article is a précis of Rich Unis' remarks to the October 9, 2003 Chapter Meeting.

*This is the way the project ends
This is the way the project ends
This is the way the project ends
But with a bang not a whimper
(With apologies to T.S. Elliot)*

While the PMBOK discusses the proper set of activities to consider upon completion of a project, closure is among the least discussed and most grudgingly implemented of project management processes.

Often viewed as a necessary but tedious formality by project managers and team members, the value of the closing process as an organizing tool is almost always overlooked. However, properly done, the effort will create value and satisfaction.

The PMBOK breaks Project Closure into two distinct phases: Contract Closeout and Administrative Closure. In actual practice, project managers do only what's absolutely required to take care of business and satisfy the system. As for the rest, to quote William Shakespeare, "it is a custom more honored in the breach than the observance."

Pressured by waiting projects, we are inclined to settle payments, issue releases, review contract performance and complete the forms required by our organization's version of the project police. The effort required to "clean up" administratively does not seem important or cost effective.

Let's re-examine the value. In my mind, a thorough closure process can become a force propelling good project management practices. The knowledge and information developed and recorded during the now-completed project represent a trove of marketing and intellectual capital.

Properly packaged, the templates, spreadsheets, charter, initial scope statement, project plans, SOWs, change management records, presentations and deliverables can be invaluable marketing capital in search for new business and its execution. Though confidentiality clauses in contracts may restrict specific artifacts, generally these files, properly used, represent a valuable addition to your personal project management toolboxes.

Given our time constraints, the secret is to prepare the closing act of the project performance first. As you manage the project and team, document things and preserve the capital. Organize yourself to view closure as the final act of the play. The story is in the telling. Write it as you go. Closure will become a valuable organizing element for project discipline in all knowledge areas and processes.

Letter from the President



PMI Westchester in a world of change

As you might expect, PMI Westchester is a microcosm of the world around us, operating with the same challenges we and our businesses all face. How we deal with those challenges

determines our survival, quality of life, and for PMIW (short for PMI Westchester), the success of our operations.

Take this newsletter for example. PMIW had adopted a strategy of redundancy for many of our key chapter operating directors to mitigate against loss of function, yet a change in both our editors' priorities just before the September issue resulted in cancellation of both the September and October issues. But change works both ways, and people are just as flexible stepping into roles as out. During our October 9 chapter meeting John Murphy, VP of Programs asked if anyone would like the job and two extremely qualified individuals stepped forward to become our new Directors of Publications. Please welcome Chris Gaffney and Craig Howe to the PMIW board as you read this, their first newsletter.

Amy Schneider began with the board last year in our wild card position as Backup Board Member. After a while she stepped in to handle booking of our chapter meeting Vendor and Career Corner guests, and she joined the Breakfast Roundtable team as well. Amy has recently decided to take a step back and give someone else the opportunity to book vendors. At that same October chapter meeting Jim Kenny stepped forward to fill the need. Please welcome Jim Kenny as our new Vendor Relations Program Manager.

During our October board meeting Joe Fitzgerald announced that he has taken on some additional responsibility in his other lives and would like to reduce his role as Director of Professional Development. Coincident with this event Anita Dhir, VP of Administration and Career Development Program Manager for the NYC chapter, resigned those responsibilities from the NYC chapter and has accepted our offer to become our new Director of Professional Development. Joe has agreed to stay on in the role of Assistant Director of Professional Development.

We had been looking for a Career Development Program Manager and Anita is the founder and developer of that program for NYC. We couldn't have dreamt of a better fit. Anita's and our vision for Professional Development includes both education and career development and she already has several events on the drawing board starting in late January. Please welcome Anita Dhir as our new Director of Professional Development.

Chapter Secretary, Peggy Chin, has stepped aside due to increased business commitments and that office is open to the readers of this newsletter. If you are interested please give me a call at 914.834.4162. Thanks Peggy for serving the chapter since its inception.

Since our founding with 9 board members in the summer of 2002 we have replaced 5, and added 3 co-directors and 5 program managers for a total of 18 actively participating in running the chapter.

Chapter Sponsorship

One of the many programs that benefit both the chapter and its corporate supporters is the Sponsorship Program. The chapter invests all of its revenue from door fees, dues and education in its programs but sponsorship provides our safety net. Corporations large and small should consider the benefits of PMI Westchester sponsorship:

- Company ad with logo and link to website appear at the top of our Sponsorship page and in the newsletter.
- Announced as meeting sponsor at chapter meeting of sponsor's choice. Listed as sponsor on the agenda, with name / logo projected on overhead screen during the Networking portion of meeting. Listed as sponsor on the PMI Westchester website, with logo and link to the sponsor's website. Option to appear as Vendor or Career Corner at that meeting, with additional time on the agenda to talk about company products and services.
- The satisfaction of supporting (and known as supporting) excellence in project management in this community.

Our monthly costs are almost \$1,000. Any amount toward that expense will be accepted and appreciated, and any individual or corporation may become a contributing sponsor to the PMI Westchester chapter. To become a sponsor, call or write either of our Directors of Marketing:

Sushil Bhatia
sushil.bhatia@anudata.com
845.221.8206

Mahesh Sahasranaman
Maheshs@earthlink.net
914.681.8921

Upcoming Programs

Tuesday, Nov 11: "From Quality to Business Excellence" by Chuck Cobb, Managing Partner, The Business Excellence Group, Medfield, MA in a joint meeting with the American Society for Quality.

Thursday, Dec 11: "Facets and Challenges of Managing the Development of a \$1 Billion Satellite" by John Loiacono, Deputy Project Manager, EOS Aura Project, NASA Goddard Space Flight Center.

Education: Anita is arranging additional sessions of her popular Project Management Tools and Techniques and MS Project Workshop for early November, and we are considering a PMP class for December or January. See the article on the following page and watch the web site for dates, location, enrollment information and class descriptions.

(Ed's Letter continues on the next page)

Election in December

Our chapter bylaws specify an election each year for two (or three) of our five officers – President, VP Programs, Treasurer, Secretary and Director of Membership. This year the President and VP Programs positions are up for election.

Our nominating committee is in place and will be searching for candidates for VP of Programs. John Murphy has expressed interest in moving on in the fall of 2004 and this position will be VP of Programs Elect for 2004, becoming VP of Programs in 2005 or sooner if he steps down earlier. Contact Nominating Committee Chair Mark Shaiken at mshaiken@us.ibm.com if you are interested.

The President's position is up for election as well but candidates must come from the board, not the general population. Interested parties should join the board as soon as possible.

We will hold the election in December. Watch your mail and the web site for more on the upcoming election.

See you at the Tuesday (not Thursday), November 11 chapter meeting; see the next page of this newsletter or go to <http://www.pmiwestchester.org> for details.

All the best,
Ed Mahler, PMP
President, PMI Westchester

Earn PDUs

PMI Westchester not only promotes the Project Management discipline in Westchester, but provides local PMPs a channel for earning those valuable PDUs you need to maintain your PMP certification.

You can earn PDUs by:

- Attending Chapter Meetings
- Publishing Articles in the chapter newsletter
- Attending other sanctioned chapter events
- Joining a chapter committee or the board

For more information on the many ways you can earn PDUs, contact Anita Dhir – Director of Professional Development at adhir@sprintmail.com.

Professional Development

REPEATED DUE TO ADDITIONAL DEMAND! Project Management Training

Anita Dhir
Medhira Enterprises

Take advantage of two bargain opportunities for project management coaching by an expert. These classes represent the state of the art in project management and may be taken by experienced PMs for their update and refresher value, and by newer PMs as a growth experience. Take either class or both. Those planning on taking the MS Project class will benefit from the PM Workshop's review of the planning, tracking, and reporting environment. Both classes provide PDUs or can be used toward PMP qualification.

Project Management Tools and Techniques

Project Management Tools and Techniques discusses the tools used during the project life cycle to ensure the completeness and accuracy of project information. In this hands-on class, the students will learn how to create templates and focus on techniques that are applied during project initiation, planning, execution, tracking, and closing. This course also provides an insight into the benefits and capabilities of project management related software.

Cost: \$300 for PMI Westchester Chapter members
\$350 for all others

Microsoft Project Workshop

Managing projects effectively requires understanding project needs and managing time, cost, and resource constraints to deliver quality products / services that are on-time and within budget. This poses an ongoing challenge for project managers. Microsoft Project provides the capability to view, analyze, and manage these four elements concurrently. It is used to schedule and track project activities as well as to communicate project status.

Cost: \$300 for PMI Westchester Chapter members
\$350 for all others

Dates and location to be announced soon on our chapter home page. Check out www.pmiwestchester.org for more details or contact Anita directly at adhir@sprintmail.com.



Next Chapter Meeting – TUESDAY, November 11, 2003

PACE University, Pleasantville Campus, Kessel Center

A combined meeting with the American Society for Quality, Tappan Zee section

<http://www.asqtz.org>

Quality Management is an integral part of successful project management and one of the nine Project Management Knowledge Areas identified in the PMBOK. The American Society for Quality (ASQ) is devoted to expanding the skills of quality practitioners across the country. This month's meeting brings our two organizations together so we can share best practices in quality.

Time

5:30pm to 7:30pm

Agenda

5:30 to 6:15	Networking, buffet dinner, Meet the Vendor and Recruiter
6:15 to 6:45	Chapter business and announcements
6:45 to 7:30	Featured program
7:30 to end	Continued networking, buffet dinner, Meet the Speaker, Vendor and Recruiter

Featured Speaker

Chuck Cobb Managing Partner, The Business Excellence Group, Medfield MA
508.359.7807

Topic

From Quality to Business Excellence describes a new vision of the future for quality management that goes beyond traditional quality roles and integrates all aspects of the business around business excellence. Chuck Cobb will explain why this vision is not just another quality program and is likely to have a significant and lasting impact. Chuck will discuss companies who have successfully implemented a business excellence strategy and achieved significant impact from it, which can help you develop a strategy for rejuvenating the quality system in your own company. This new vision provides new leadership opportunities to develop the cross-functional, systems approach to management that's needed to implement this vision.

Vendor Corner

Claudio Cervini Account Executive, Tenrox
450.688.3444 ext. 3301
www.tenrox.com

Career Corner

Paul Byrne Account Executive
Valerie Davis Senior Technical Recruiter
Software Guidance & Assistance
914.681.0500
www.sgainc.com

Directions

From EAST or SOUTH

Cross Westchester Expressway – Interstate 287 West

- Take exit 3 to the Sprain Brook / Taconic Parkway north
- Continue north passed the Hawthorne and Saw Mill River Parkway exits
- Exit right for Pleasantville - Route 117
- Turn right at the traffic light at the end of the ramp
- Go to Entrance 3 (about 2/10th of a mile) and turn left into the campus. Entrance 3 Three has the easiest access to the dorms and Administrative Buildings
- See Entrance 3 to Kessel Center map on next page

From WEST (Rockland) or SOUTH

Tappan Zee Bridge and Cross Westchester Expressway – Interstate 287 East

- Cross the Tappan Zee Bridge from Rockland
- Continue south on Interstate 87 / 287
- Take Exit 8 – Cross Westchester Expressway
- Keep in the RIGHT lane and immediately take Exit 1 for Saw Mill River Parkway / Route 119
- Keep in the LEFT lane and take the Saw Mill River Parkway north
- Follow the Saw Mill River Parkway north to Exit 26 Taconic State Parkway
- Take the first exit right for Pleasantville - Route 117
- Turn right at the traffic light at the end of the ramp
- Go to Entrance 3 (about 2/10th of a mile) and turn left into the campus
- See Entrance 3 to Kessel Center map on next page

From NORTH

Taconic State Parkway – Southbound

- Take the exit Pleasantville Road/Pleasantville
- At the end of the ramp, turn left at the light and proceed under the Taconic Parkway
- Continue on Pleasantville Road to the third traffic light
- Turn right at this light
- Proceed 2/10th of a mile and at the STOP sign turn right onto Route 117 (Bedford Road)
- Entrance 3 for the campus is 3/10th of a mile on the right
- See Entrance 3 to Kessel Center map on next page

(More November Chapter Meeting on the next page)

Location

PACE University, Pleasantville Campus, Kessel Center
861 Bedford Road, Pleasantville, NY 10570

Phone 914.773.3200
Automated Phone
Directions 914.773.3737

Fees

Westchester chapter members – \$15
Non-members – \$20

We accept cash or check at the door (sorry, no credit cards).

News from PMI HQ

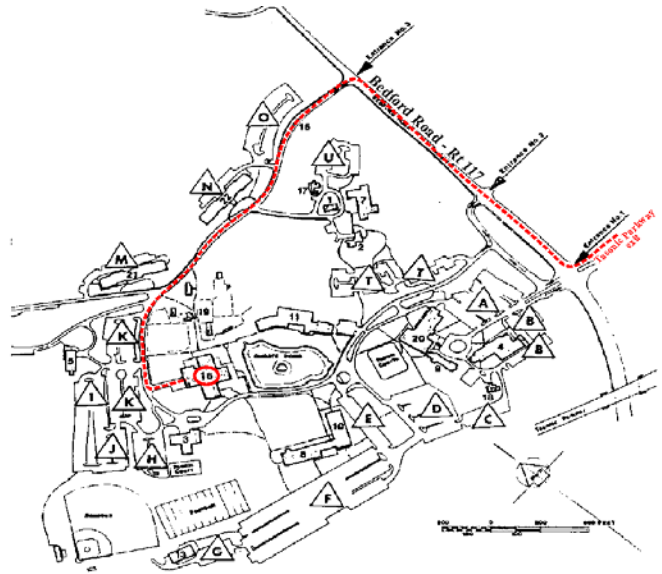
Construction Extension to PMBOK Now Available

The *Construction Extension to A Guide to the Project Management Body of Knowledge (PMBOK® Guide) - 2000 Edition* is now available to all PMI members. Look for it at https://secure.pmi.org/memberapp/code/premium_content/standards/index.asp.

PMI Global Congress 2003 – North America a Major Success

Even Hurricane Isabel was unable to dampen the enthusiasm surrounding this very successful congress, held September 20 to 23 in Baltimore, Maryland. More than 3,000 attendees from 44 countries enjoyed an opportunity to personalize their professional development experience by attending presentations within eight Areas of Focus spotlighting project management's emerging trends and time-tested best practices. Attendees also had the pleasure of discovering innovative ways to solve their project management challenges by browsing 154 booths of the very latest project management products and services presented by 97 exhibitors. The congress kicked off on Saturday, September 20 with the 2003 PMI Awards Ceremony and Reception, an exciting and very colorful event that drew over 1,000 registered attendees. If you were unable to attend this year, make plans now to attend one of three PMI Global Congresses in 2004. Stay tuned to www.pmi.org for more details.

From Entrance 3 to Kessel Center



#16. Kessel Campus Center

After the guard shack go 2 stop signs and make a left.
Go 2 more stop signs and make a left in to the parking lot of the Kessel Campus Center.

Breakfast Roundtables

In addition to our monthly chapter meetings, PMI Westchester offers monthly Breakfast Roundtables. These interactive monthly events enable you to discuss project management issues that affect your work and careers. Participants are encouraged to share their challenging experiences so we can all benefit from the combined knowledge of the attendees.

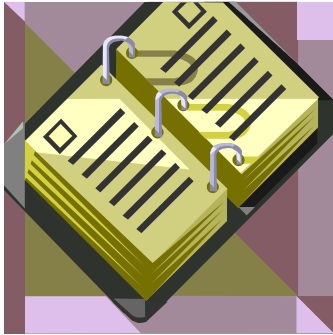
Meetings are typically held the fourth Thursday of each month; however, due to the upcoming holidays, the November Roundtable will be held the third Thursday of the month on November 20. There will be no Breakfast Roundtable in December.

For additional information, contact any of the Breakfast Roundtable Program Managers:

Joanne Guerriero 914.641.2682 jguerriero@pinie.com	Amy Schneider 914.642.3713 amyss@us.ibm.com	Tom Smith 917.626.1013 tsmithsr@rcn.com
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Upcoming Events

Mark your calendars for the following upcoming PMI and area project management events. For detailed information about each event, visit the PMI Westchester Website at www.pmiwestchester.org.



November Chapter Meeting

From Quality to Business Excellence
 Tuesday, November 11
 5:30 to 7:30 pm
 (See story on page 4).

November Breakfast Roundtable

Project Communications: The Challenges Working with Virtual Teams
 Thursday, November 20
 7:30 to 8:45 am

Project Management Training

Project Management Tools and Techniques
Microsoft Project Workshop

Dates and location to be announced. See www.pmiwestchester.org for further information (See story on page 3).

December Chapter Meeting

Facets and Challenges of Managing the Development of a \$1 Billion Satellite

Thursday, December 11
 5:30 to 7:30 pm

December Breakfast Roundtable

No Breakfast Roundtable this month. Happy holidays!

Advertise in the Critical Path

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To advertise in The Critical Path, email our Publications Directors at cgaffney@prism-comm.com or craig.howe@greatfallsgroup.com.

PMI Westchester Needs You!

The Westchester Chapter has opportunities for volunteers. In particular, we need help in the following areas:



Secretary – This board position is responsible for recording, publishing, and maintaining board meeting minutes and other vital chapter documents and records.

Meeting Locations – Do you know of a facility that can hold 100 people for chapter meetings?

Backup Opportunities – Board and Committee members are volunteers and from time to time become overloaded with their day job and/or personal life. To maintain chapter programs and services we are in need of backup for all positions. Joining the backup team is an excellent way for members to contribute and become familiar with leadership positions they might want to consider in the future.

Please contact John Murphy, Vice President – Programs at 914.833.2932 (email Programs@PMIWestchester.org) or Ed Mahler – President at 914.834.4162 (email edmahler@paiwebsite.com) if you can help.

Hear Ye Hear Ye! Call for Writers!

We're looking for you to help us write articles and stories for the PMI Westchester Critical Path. Do you:

- Have an interesting project management related story?
- Know a tool or technique that helped you solve a project problem?
- Like to write or draw, and want to show off your talents?
- Have an idea for an article but need a little help putting it on paper?



We need a few good men and women to contribute to the newsletter. By publishing in the PMI Westchester Critical Path, you help us deliver a better newsletter, gain exposure among your fellow professionals and even earn a few PDUs towards your PMP recertification.

Whether you have an idea for a single article or an entire series, we'd like to talk to you about it. For more information, call or email either of our Publications Directors:

Chris Gaffney
 914.345.1300

cgaffney@prism-comm.com

Craig Howe
 203.656.1825

craig.howe@greatfallsgroup.com

PMI Leadership Meeting – September 17 to 20, 2003

The PMI Westchester Chapter was represented at this fall's PMI Leadership Meeting by Ed Mahler and Sushil Bhatia. One of two each year, the PMI Leadership Meeting was held at the Baltimore Convention Center the week before this year's PMI Global Congress 2003 – North America.

The PMI Leadership Meeting is open to any PMI Westchester Board Member (another excellent reason for volunteering). Some of the benefits include:

- Enhancing and expanding personal leadership and organizational skills including legal and ethical responsibilities of all officers
- Sharing innovation, insights, and opportunities necessary to build a team dedicated to managing a nonprofit PMI component organization as a volunteer leader
- Offering tools, techniques and training focused on cultural competencies and membership topics



- Delivering up-to-date news on PMI global initiatives and activities
- Conducting Leadership Development and Excellence Committees (LDEC)/College forums
- Interfacing with PMI's Board of Directors and Headquarters staff to hear future direction and provide valuable feedback
- Establishing networking forums to exchange ideas and best practices with colleagues from around the world
- Earning Category Three Professional Development Units (PDU) for formal learning activities related to project management

Ed took lots of pictures at the PMI Leadership Meeting. You can view the complete set at <http://community.webshots.com/album/91813623ONgibe/0>

P.S. Neither Ed nor Sushil will admit responsibility for Hurricane Isabel. Perhaps they are not *directly* responsible. However, some of us find it mighty suspicious that they were both in Baltimore when the hurricane hit...



0 to PMP in 5 Days!

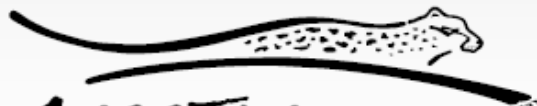
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