Project Management Institute
Westchester
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The Critical Path

October 2011

This Isn't What I Wanted

Kathy Steuber, PMP has been a project manager for over 12 years and a senior project manager in the technology/software field since 2006 for NICE Systems, Inc. She lives in New Rochelle.

As a PM, you've likely lived through some version of this scenario at some point in your career….and in my case as a technology PM, I have lived it a few times more than I care to remember….You present the final solution to your customer and wait for the congratulations and their exclamation of delight as they realize that the delivered solution is way better than they ever imagined possible. But….then you get "the face"…the furrowed brow and look of consternation followed by the words that sting like a slap to the face: "This isn't what I wanted."

What? How could that be? We've built the solution to meet all of the prerequisites that were signed off by the whole team. And we built the solution in accordance to the design documents that were reviewed and approved by the whole team. Ugh!

As PMs, we are programmed from the start of our careers to manage stakeholder expectations—to mitigate assumptions and clarify what is and isn't possible. But in addition, we must consider that the customer has an expectation of what the solution is going to look like.

Expectations about functionality, cost, or timelines are not the same as the more basic fundamental expectations. For example….Imagine we're discussing the feature of a car. I tell you that the car has a V8 engine and rear-wheel drive. In your head you're thinking Ferrari but in my head I'm thinking pickup truck—and in this case, we'd both be correct. This is the same situation that could be encountered with customers. In order to understand the features that are being described, we try to visualize the end product. If the actual deliverable doesn't match that picture in your head, then someone will always be disappointed. Naturally in this example, if we were to discuss more than those 2 features, it would be easier to change the mental picture and potentially hone in on the same vehicle. But generally speaking when we're building new products for our customers the frame of reference is often missed.

A customer's expectation of what the end solution might look like is not the only problem; the second is one of understanding. When we ask our clients to sign off on solution design documents do they really understand the impact of what they are signing off? What does the signature on the bottom of an SDD mean if the customer doesn't truly understand what they are agreeing to?

I had a project recently where we delivered the final solution to the customer for user acceptance testing and immediately received 4 change requests for items that were "missing" that they had expected. When I contacted the customer to ask why these items hadn't been identified earlier, the response was that they assumed they would be included. I referred back to the executed SDD and SOW and the response was, "Yes, the SDD and SOW are correct, but we thought that you had to build the other pieces to make that happen."

Along the same lines, a solution design review of the "look and feel" of an application isn't always recognized as a significant event. In my discovery sessions, I am frequently provided with end users for the user interface review because they are the people that will be using the system. Consulting with the business is a great idea, but the customer (project stakeholder) then has to accept that they are putting the approval of the system's look and feel into the hands of those end users. If they aren't involved, then ultimately they lose the right to come back later and make changes.

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"The Critical Path" Inside this Month's Issue

Letter from the President

Seven Myths about Status Reporting

In the many years that I have managed projects, I have seen many people (including myself) struggle with the communication of project status. While I've never seen a project that didn't require some form of status report – I've seldom seem project teams embrace status reporting in a positive way. More often than not, my experience is that project teams are under the sway of at least one of these seven myths.

Myth 1 – Wait until the reporting period is over to assess status, because then you'll know what you've done. Adopt this myth, and you are probably reporting no progress anyway. A good status report is nothing more than a project plan with progress marked off combined with a look forward to identify what will be done, who will do it and what roadblocks are in the way. If you create a plan, identify tasks and mark them complete as they are done, your status report gets done as you proceed. If you have no plan, well, tell me, what is it that makes you a manager?

Myth 2 – No one will read it, so why should I write it? At a minimum, creating a status report means sitting down, assessing where you are with a project, deciding what you need to do next and identifying the challenges you face. It's an introspective process – and you are the main audience. When you take time out to reflect on your activity, you have a chance to learn from your mistakes and prepare yourself for the future. You are the main audience and beneficiary, even if no one else is. Ideally, you do have a project sponsor and other stakeholders that are engaged and supportive of your project and will want to actively read your report and engage with your efforts.

Myth 3 – We're agile – we don't bog ourselves down with extra paperwork and lengthy plans. While Agile approaches reject detailed long term project plans, they strongly embrace frequent, but lightweight status reporting, that is built into the process. Agile processes stress continuous timely accurate communication between the team members and the project stakeholders. If you're truly agile, you don't need to take time out to reports status because you already doing it on a continual basis.

Myth 4 – Why should I do status when there is obviously so much real work that needs to be done? I'd say, if you're so busy you can't take time to understand where you are and where you are going, then your project is seriously short of resources. You won't solve a resource shortage by trying to do all the work yourself. You need to either convince your sponsor to get you more resources or get him or her to trim down the project scope. You should use the status report as a way to force the sponsor to make the tough choices needed to keep the project on track.

Myth 5 - If the project is stalled, I should try to get it started before I waste time on a "status report" or my sponsor will be all over me and I'll never get anything done. True, it's not easy to tell your sponsor that the project is in trouble – but that is because the sponsor wants the project to succeed at least as much as you do. As hard as it is to deliver bad news, if you wait longer, it will get harder – and you and your sponsor's options will be more constrained. If your project is stalled, your best prospect for getting help is to let your sponsor know what the situation is and what you need from him or her to address the issue.

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Of all the issues, this might be the biggest and it’s the one that turns me into a basket case, shaking at my desk. Generally not this blunt…but ultimately the message is always the same: “It doesn’t really matter what I agreed to before because I’m the client and you need to give me what I want.”

Now, I know that everyone reading this is thinking the same thing…”man, that’s harsh!” But ultimately, if customers don’t feel they have received the solution that they’ve paid for, then they’ll try and use their position to get what they do want. And the reason why they consistently do it is simple, it works.

At the end of the day, there is no point in delivering to a customer a solution that they don’t want, so the project manager is potentially faced with more work to meet the client’s needs--regardless of what documents have been signed off.

So how do we as project managers avoid this nightmare? Like so many situations, the key is good communications. We can’t stop customers from visualizing the solution based on features, but we can use an intelligent requirements review with the customer to try and ensure that their focus is not on the look and feel of the solution but rather on the features themselves. Drawings and network diagrams are important, but not at the requirements stage; instead do a review that is based on process flows of functionality lists. I can’t stop the customer from imagining their own solution, but I can make sure that they don’t just focus there.

It’s also important to help them understand that anything that’s not on the functionality list isn’t going to happen. I know some PMs try to get a signoff as quickly as possible so that the project can move forward; my recommendation is the exact opposite. I almost want to hold the client back from signing off--I want to challenge them to make sure we’re on the same page during our discovery sessions/project meetings and all of the deliverables are clearly defined. A requirement won’t go away simply because it was forgotten until after signoff, so you may as well deal with it early on.

When it comes to the design review walkthrough, I absolutely agree that the end users should be involved--they are the people who will be using the system and they may be able to identify problems that more senior team members would miss. However, it’s imperative to also have the people who signed off on the requirements involved. This is my opportunity to remove their “assumed visualization” of what the system will look like and replace it with reality. Because if they didn’t’ buy it, they’re likely not going to get it.

Take the approach of walking them through the system at a relatively high level and then relating each of the requirements to the system design. You want the customer to see that everything that they asked for is included, and just as importantly, nothing that wasn’t in the requirements is included. This way, you can have discussions with them around how their expectation differs from the design (and whether their expectations were modified or the design was updated.) In either case, the focus is on the best way to achieve the stated goals.

Finally, in terms of dealing with the customer’s perception that they can change things up at the last minute because we want to keep the customer happy, it’s important to make sure that the customer is helped to understand the costs involved with late changes. If the customer is heavily involved in the requirements and design work tasks then if there are problems they can be fixed a lot easier than during acceptance testing. Even in situations where the customer has a fixed price contract and they don’t have to pay more for late changes, there will be delays to the timeline--and that’s not something either of us want to experience.

I have had projects where this has happened to me, but looking back on those projects there was always a failure at some point to correctly manage the customer through the process. These are the projects that stay with me as nightmares not because of the way that I felt having the conversation with my disappointed customer, but because of the way that I felt when I realized that what had gone wrong was avoidable.

What Forest *(continued from page 1)*

Myth 6 – No need to meet face to face – I can just email my status report in. Sorry – but we're social animals – and we need face to face contact to build trusting relationships. Presenting your status in person (or by video or phone conference if you are working remotely) – is a chance for you to build a relationship with your sponsor and key stakeholders. Doing it from the beginning of the project will help you develop a reservoir of trust that you will undoubtedly need when the project hits its inevitable rough patches later on.

Myth 7 – Better explain all problems in detail so I don't get blamed for them. There's a fine line between an explanation and a rationalization, and it's a tempting one to cross. When we offer a rationalization, we are essentially disowning responsibility for an issue to dispel our anxiety about dealing with it face on. We may be able to fool ourselves, but others are likely to see through that ruse. Rather than explain why there is a problem, try simply describing the problem and its impacts and the options that you and the sponsor have for fixing it, mitigating its impact or accepting it as a fact and moving on.

In short, status reporting is the flip side of planning. If you have clearly defined tasks, with objective deliverables, assigned to resources and set to a schedule, then it's pretty easy to chart project progress in a way that can be clearly conveyed to your stakeholders. Having that conversation provides you with a critical avenue to build a positive working relationship with them and get support for your project when you need it.

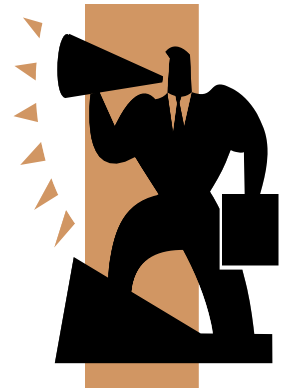
See you at the October Chapter Meeting!

Duff Bailey, PMP
President, PMI Westchester

Volunteer Positions Available !!

The Westchester Chapter has several open volunteer positions, which are listed below. To volunteer contact Mary Jo Vessecchia, Director, at volunteer@pmiwestchester.org or call 914-522-9199.

Opportunities –



- Program Manager – Sponsor & Vendor Relations
- Co-Program Managers – Mentoring (2)

The chapter is always interested in ideas for new programs and people to run them. To suggest a new chapter program that you would like to pilot contact Duff Bailey, Chapter President, president@pmiwestchester.org or call 914-263-5034.

Board directors and program managers can often use help in the form of committee volunteers. If you would like to get involved with an existing chapter program visit the Officers & Contacts page, contact the owner of the program, and offer to help.

Advertise in "The Critical Path"

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Quarter Page	$50 / issue	$42.50 / issue
Business Card	$25 / issue	$21.25 / issue

To advertise in The Critical Path, e-mail our Vice President of Communications at newsletter@pmiwestchester.org

Choosing The Right Risk Tool

A Risk Doctor Briefing Note

© 2011 Dr David Hillson PMP FAPM

david@risk-doctor.com

The risk process produces large amounts of data that are needed to support analysis, reporting, decision-making and action. Tools can help us to manage these data efficiently. But there are many alternative risk tools, so how can you choose the right one for your needs? The following factors should be considered:

- **User base.** Ask potential users of the risk tool what they need. Consider each user group as their needs will be different.
- **Functionality.** Define and prioritize the required technical risk functions for the tool.
- **Process support.** Be sure that your risk process is mature and stable, and then be sure that the chosen tool can support your process.
- **Integration.** Consider how the risk tool should integrate with other tools and processes in projects and the wider business.
- **Reporting.** Define what standard risk reports you need, as well as the ability to produce bespoke outputs.
- **Training.** Consider what training your staff might need to be able to use the risk tool properly.
- **Scalability**. Decide on scalability and whether you are managing risk for different sizes of project and at various levels across the organization.
- **Support.** Think about what ongoing support you might need after you have bought the tool.
- **Growth potential.** Assess how the chosen tool might need to grow with your business.
- **Affordability.** Determine your budget, including purchase of the tool, possible customization, piloting, data cleansing and entry, training, communication and roll-out. But cost should not be the driving consideration – you will get what you pay for and you should buy what you need.

These factors can be compiled into a "functional requirement specification" defining what you need from your risk tool. This categorizes requirements into those which are essential, the ones that are preferred, and optional extras. You might even develop a weighted scoring system based on the various requirements.

You can then use this specification to screen available risk tools and produce a short-list of possible candidates that meet all or most of the criteria. Invite the vendors of these tools to present their tool in more detail. Try testing each tool using actual risk data to ensure that the reality lives up to the vendor's sales pitch. Invite real users to take part in trials to give you their feedback on whether it meets their needs. See if vendors are able to tailor their tool to meet your specific requirements. Be ready to ask difficult questions!

A risk tool cannot guarantee effective risk management, however good that tool may be. Having a copy of Microsoft Word will not make you a good writer, and owning a power-drill does not mean you can build a wardrobe. In the same way, use of a risk tool does not ensure the ability to manage risk. But tools can certainly play a part in supporting the risk process – if we choose the right one.

To provide feedback on this Briefing Note, or for more details on how to develop effective risk management, contact the Risk Doctor (info@risk-doctor.com), or visit the Risk Doctor website (www.risk-doctor.com).

PMI Westchester would like to thank BrainStorm New York for being our October Chapter Meeting Sponsor

**** See our Upcoming Events section on page 8 for a special offer!!***

Planning For The Big Day

Michelle LaBrosse, PMP, is the founder of Cheetah Learning, the author of the Cheetah Success Series, and a prolific blogger whose mission is to bring Project Management to the masses.

When a wedding invitation comes in the mail, my gut instinct is to leave it in the mailbox and have the mailman take it away to someone else who might actually want to attend. This is my thought for about two seconds, before logic sets in and I realize that wedding guests are not so replaceable, that I must reply to this RSVP either way, and that I better have a pretty good reason if I plan to reply with "not attending."

Now don't misunderstand me, I love my family and friends, and wish nothing more than to spend time with them and celebrate their biggest moments in life. But going on my 30th year of attending weddings, quite regularly mind you, I have had quite enough of the chicken dance, bad cake, sloppy best man speeches, and most of all, the poorly planned wedding that causes frustration and boredom for all involved.

That was my view on weddings, up until this last summer. A co-workers daughter invited me to her wedding and I prepared myself for the usual wedding scene, bringing along with me my iPhone (for unexpected delays), some mints to share with the other guests as the night and the drinks wore on, and my sense of humor. To my surprise and relief, the wedding was the most smoothly run event I had been to in years! And the biggest shocker of it all is that it went off without a hitch…in the middle of a hurricane! It was so much fun I completely lost track of time and danced the night away

While I attributed my evening of surprising fun to great companions, a fantastic band, and amazing food, I also think the success of the event relied solely on the expert planning by all involved. The more I thought about it, the more I realized that any big experience that I had that was fun, adventurous, and successful sprouted from detailed and accurate planning.

The concept of "planning fun" can sometimes be hard for those of us out there who like to "live in the moment" and who generally get nervous if too much planning takes place (you know who you are!). But the moment that you invite others to "live in your moment", as you do while planning any sort of event, is when you need to make sure that good planning takes place to produce an event that is fun for all. Here are a few things to keep in mind when planning your big day, whether that be a wedding, job interview, holiday party, work retreat… or whatever!.

Develop a scope statement. There is one thing worse than not planning at all, and that is planning for planning's sake, without an end result or goal in mind.

To keep this from happening, at the very beginning of planning your big day, develop a scope statement that focuses your planning efforts on one main goal. For example, let's say you're planning a work retreat for your company to improve communication and morale. Your scope statement could read: "Gather all current employees for a one day retreat to be held before the end of the year. Also, create a detailed 8 hour schedule of team building activities with the end goal of increased communication among employees, as measured by project success rates, and improved morale, as measured by employee satisfaction surveys."

Select the planning team and deliverables for each person. One of the best things about wearing a project manager hat is that once you define your project tasks, you don't have to go at it alone. Master the art of delegating through your PM powers of influence and negotiation, and define a team that will help you with your planning.

Develop a Schedule. Decide when your big day will take place, and work backwards from there to see what you will need to make your big day a success. Remember, you are not a machine, so make it easier for yourself to remember due dates of deliverables by creating a calendar and setting reminder alarms to go off on your phone. Also, ensure that everyone on your project team is accountable for their deliverables as well by publicly displaying the schedule (Google calendars, or a company's shared workspace) so that there is no confusion over who is responsible for what.

Develop a Budget. Nothing sucks the fun out of planning (yes, planning can be fun!) like running out of money when half the deliverables are accomplished. Develop a budget that prioritizes the activities that "must be done" first, leaving secondary items for money left over. For example, when you are preparing for a job interview, it might be "nice" to get your hair cut and colored before you go to your interview, but it is a "must have" to have appropriate clothing and your resume printed. Save the nice-to-have's for last to make sure you are planning for success.

Risk Planning. The last thing that you want when planning for a big day is what could potentially go wrong. But that is exactly what needs to happen before your big day. To do this, use your imagination, your team members, friends, and coworkers to get a good idea of what could happen if things don't go as planned, and then come up with ways to mitigate these risks. For the wedding I attended that took place during a hurricane, the risk plan included getting umbrellas that complimented the wedding party's dresses and to make sure the wedding facilities had back up plans if the electricity went down.

Have Fun! All that planning can be stressful and time consuming, but the payoff for your big day makes it all worth it. Do your big day the right way, with good project management planning. Before you know it, even the most klutzy of guests (like me) will be dancing the night away!

Project Management Institute
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Chapter Meeting – October 11, 2011, 5:30 PM - 7:30 PM

Topic: Winning Risk Management and Mitigation Strategies in Program and Project Management: Lessons Learned and Critical Success Factors

With the recent dramatic downturn and unsettling events of the global financial markets, large amounts of investment dollars have been lost. Key questions that these trends raise are: Could we have better predicted these events and taken the corrective actions to minimize their impact sooner rather than later? Could we have anticipated these events and set up appropriate risk assessment and mitigation strategies with appropriate contingency plans?

According to some experts, a strong risk management and mitigation process, combined with solid program and project management practices can decrease problems on a project by 80 to 90%. The combination of a good risk management process and plan with best practice project management processes and disciplines is critical in reducing uncertainty, anticipating disruptions, minimizing threats, developing contingency and continuity plans and taking advantage of the right opportunities.

Featured Speaker – Dr. Gad J. Selig, PMP, COP

Dr. Selig is the Associate Dean for Business Development and Outreach in the Graduate Studies and Research Division of the University of Bridgeport. He earned degrees from City, Columbia, and Pace Universities in Economics, Engineering, and Business. He has authored five books and over 70 articles, chapters in books, conference proceedings and presentations.

<u>Location</u>

Antun's of Westchester
35 Valley Avenue, Elmsford, NY 10523 |
914-592-5260 | Get Map

<u>Agenda</u>

5:30 to 6:15	Networking, buffet dinner, Meet the Vendor and Recruiter
6:15 to 6:30	Chapter business / announcements
6:30 to 7:30	Featured program
7:30 to 7:45	Continued networking, meet the Speaker, Vendor, Recruiter
7:45 to 8:45	PMO SIG Meetings (PMO & Quality)

<u>Fees</u>

Chapter members − $20; Non-members − $25
We accept cash or checks. Sorry, no credit cards.

<u>Career Corner</u>

Katie Murphy, Director of Resources
Enterprise Solution Providers, Inc.
777 Westchester Ave, Suite 208
White Plains, NY 10604
Phone: 914-428-5202 / Fax: 212.448.0646

<u>Vendor Corner</u> - Watch our website for details

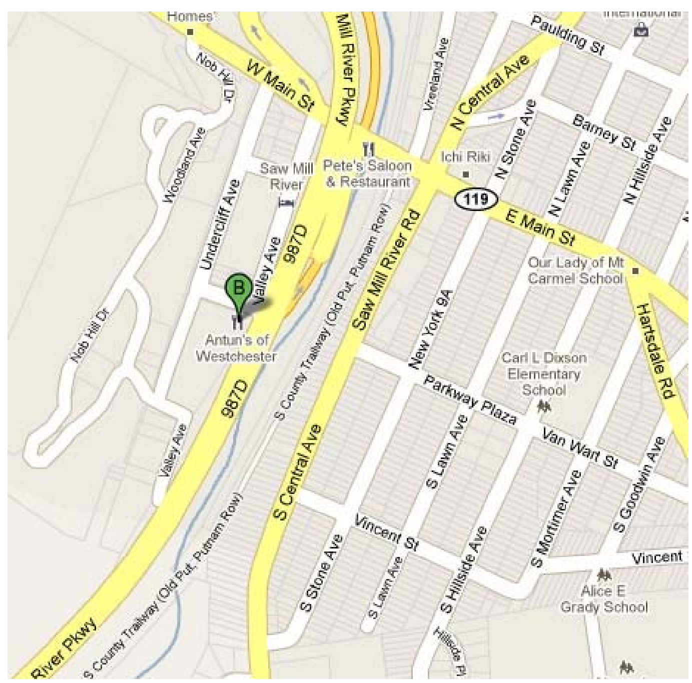
<u>Directions:</u>

From the South:
Take the Saw Mill River Parkway North. Get off at the 9A North exit. Turn left onto Route 9A, go under Saw Mill Parkway, and immediately turn left onto W. Main Street / Valley Ave. Pull into parking lot.

OR Take the Bronx River Parkway North to the Sprain Parkway North to I-287 West. Get off at Exit 2 (Elmsford). Turn left at the light onto Saw Mill River Road. Turn Right onto 9A, go under the Saw Mill River Parkway and immediately turn left onto W. Main Street / Valley Ave. Go straight into parking lot of Antun's.

From the North:
Take the Taconic Parkway South to the Saw Mill Parkway. Get off at the 119 East exit. Make a left into parking lot.

<u>Map to Antun's of Westchester</u>



Upcoming PMI Westchester Events

October Breakfast Roundtable Meeting
Topic: Preparation, challenges and benefits of obtaining a PMP certification
Facilitator: Anita Wilton, PMI Westchester PMP Prep Course Instructor
Date: Thursday, October 25, 2011 – 7:30 to 8:45 AM
Location: MasterCard (Purchase, NY) 100 Manhattanville Road, Purchase, NY 10577. 2nd Floor Cafeteria |
No Fees - Breakfast available for purchase at the cafeteria

November Chapter Meeting

Topic: Prioritizing the Value of a PMO
Speaker: Teri Cummings
Date: November 8, 2011
Location: Antuns of Westchester, 35 Valley Avenue, Elmsford, NY 10523 914-592-5260

November Breakfast Roundtable Meeting
Topic: How Forward Planning Impacts Triple Constraints
Facilitator: Mary Gilmartin, BRT Program Manager
Date: Thursday, November 29, 2011 – 7:30 to 8:45 AM
Location: 108 Corporate Park Drive, White Plains, NY (off Westchester Ave) Cafeteria – Ground Level – 2 Buildings down from Malcolm Pirnie
No Fees - Breakfast available for purchase at the cafeteria

SCRUM Certification Class

Dates: November 10th and 11th, 2011
Time: 8:00 AM to 5:00 PM
Instructor: Mark Layton, MS, MBA, PMP – Platinum Edge
Location: Antuns of Westchester, 35 Valley Avenue, Elmsford, NY 10523
Cost: **(Early Bird Before 10/31)** $850 for Westchester Chapter Members, $950 for Non-Westchester Chapter
(After 10/31) $1000 for Westchester Chapter Members, $1100 Non-Westchester Chapter Members
Prerequisites: Students must provide their own copy of the PMI Body of Knowledge (PMBOK), 4th edition, ISBN# 1933890517. It is also recommended that you purchase the PMP Exam Prep book by Rita Mulcahy, 6th edition, ISBN# 978-1-932735-18-5. Amazon.com offers both books at a discounted price.
Register Online: SCRUM Certification (Platinum Edge)

SNEC-PMI Fall Career Day
SNEC-PMI is proud to announce our Fall Career Day in Stamford, aimed at Project Managers and Business Analysts looking for a new work opportunity. Register today and take part in what promises to be an informative day.
Date: Wednesday, October 26, 2011
Time: 8:00 AM to 5:00 PM
Location: Marriott Hotel, Stamford Connecticut, 243 Tresser Boulevard, Stamford, CT 06901
Fees: Free to attendees (parking included) - Click here for more information and to register.

BrainStorm New York Innovative Workshop
PMI Westchester is happy to announce that as a Chapter member, you are invited to attend an Innovation Workshop at no cost (a $250 value + 3 PDU's). Attend BrainStorm New York to add Business Process Management, Decision Management and Rules to your Project Management Tool-Kit. Participants will learn through case studies, demonstrations and expert advice.
Date: November 2nd **or** 3rd, 2011
Register: Register with Priority Code PMIWESTW by October 7, 2011 to secure your spot! There are 8 Workshops and over 20 Training Courses available - review the Agenda at a Glance for complete information, and register by Oct 7, 2011 with Priority Code PMIWESTW to take advantage of your Complimentary Workshop and the Early Bird Rates ($125 for additional Workshops and $100 off each Training Course). * The complimentary Workshop offer does not apply to Certificate of Training Courses. The offer is transferable within your organization, but is for new registrations only - no refunds will be given. Complimentary Workshops are limited in supply and may end at any time.

The Critical Path

The Critical Path is PMI Westchester's free monthly newsletter, published as a service for members and non-members alike. We're always looking for your contributions. To submit an article for publication, please contact the newsletter editors listed below:

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