Project Management Institute Westchester

® The hub of project management for Westchester and its neighbors

The Critical Path

January 2011

The Strategic View - Part 2: Organization of the Project Initiation Proup

Anand Kanakagiri is an IT executive for a leading Reinsurance company and the Director of Membership of the PMI Westchester Chapter. He has over 17 years of experience managing IT projects.

Introduction

In the first part of this series, I described the importance of the project initiation group and how organizational strategies determine the types of projects that get created. In this part, I will address the various forms of Project Initiation Groups prevalent in organizations.

The project initiation groups in organizations are of the following major types:

1. Adhoc Setup
2. Business Leaders and IT Leaders
3. Business Partner and Business Analysts
4. Landscape and Steering Committees

The organization of "Adhoc" and "Business and IT leader" driven is a less formal organization. The "Business Partner" and "Steering Committee" based organizations are more formal in nature.

Adhoc Setup: Many organizations do not have a formal project initiation group. Business needs are communicated using requirement logs and issues log. The internal IT organization organizes these requirements into projects. In some cases, a champion from the IT side or from the business side is able to create a program or a project based on personal initiative.

Business Leaders and IT Leaders: In many organizations, the project initiation responsibility and identification of the best way to meet requirements and getting the funding for these projects is usually led by the internal IT Senior and middle level executives. The stimulus for this exercise is usually the annual department budgeting exercise.

Business Partner and Business Analysts: In this case there is a formal role held by one or more key people who play the role of "Business Partner". A business partner has very deep understanding of the functioning of the business as well as the needs of the business strategy. The business partner also has understanding of the IT function, and the IT challenges and priorities.

Because of the deep understanding on both the business and IT side, a business partner is able to establish trust and relationships with the key stakeholders and act as a key driver of the strategy from both the IT and business side.

In case where the organization has a formal Business Partner role is established, the business partner plays a key role and as the chair for the project initiation group. It is the responsibility of the business partner working with key business analysis heads of IT to

1. Clearly communicate the strategic direction from the business
2. Develop options within the IT landscape to meet the strategic needs of the business
3. Evaluate options with the key stakeholders of the business departments who are impacted
4. Develop the business case with initial scope and costing information
5. Convert accepted options to one or more projects or programs

Landscape and Steering Committee: In several organizations, the key role played by the business partner is performed by a "Steering Committee" that drives the business landscape and transformation within the landscape. The various department heads or their representatives are a part of the steering committee.

(The Strategic View – Part 2 continued on page 3)

"The Critical Path" Inside this Month's Issue

Letter from the President

Who Cares!

I talk to many project managers in the course of a month and one of the themes I often hear is that "nobody cares". Many PMs feel that they are dutifully developing and executing project plans and communicating them to their constituents but not seeing a real commitment by key project resources as well as stakeholders. Eventually, results suffer and the project manager is likely to be blamed unless he or she has done enough to "cover one's backside" to deflect the failure onto others. The end result is an effect I often see in the large organizations who are my consulting clients. Project managers spend most of their time tallying up the project history and virtually no time planning the future – creating a culture of mediocrity.

How do we get people to care about our projects and passionately contribute to their success? You won't find that answer in PMBOK – which, rightfully, focuses on how to manage a project and assumes that the "Why" was answered by the sponsor when the project was initiated. In real life, the project rationale, if it exists at all, is merely a "business case" – which, if you accept its logic, states that if all goes well, the project will deliver an acceptable return on investment in three to five years to whoever funds the organization. Do you know anyone who can get passionate about that result?

To be successful, a project needs a compelling vision that will give everyone involved in the project a real reason to put aside other things and contribute to its success. The vision needs to be continually cited – it must be clear to everyone how each and every project task contributes to it. If that vision doesn't come from the sponsor, then it is up to you, the Project Manager to supply it and make sure that it is understood and bought into by all involved. If you don't do that, your project plans and artifacts will remain unread and be poorly executed.

What is a Project Vision? We can start with this definition by management gurus, Ken Blanchard and Jesse Stoner, (Leader to Leader, Winter 2004).

"A vision is compelling when it helps people understand what business they're really in, provides a picture of the desired future, and offers value guidelines that help people make daily decisions."

In short it needs to clearly convey to each participant how the project is going to make a difference, in ways that they understand and that can be visibly measured. One of the most critical aspects of the vision are the value guidelines. While engineers may call these "Critical Success Factors", I prefer to call them "values" because many of the most important ones are things like "Trust" or "Reliability" and can't be distilled into a single number. Values inform everyone on the project about what's important. To be effective, values must be prioritized. It must be clear to people whether time to market is more important than absolute quality or price. If people are expected to defer vacations and personal time to get the project done, that value needs to be understood and committed to by all on the project.

(President's Letter continued on page 3)

The Strategic View - Part 2 (con't)

Even in case of a steering committee, the work of developing options, business cases, initial scope and costing needs to be performed by a core team consisting of the business and IT experts. In my experience, some key resources within the steering committee take on the role similar to business partner and IT analyst and drive this process forward.

In the discussion above, we have seen two informal organizations (Adhoc & Business/IT leader driven) and two formal (Business partner and Steering Committee driven) organizations.

Each type of organizations has their own strengths and weaknesses and is applicable best in different situations. The informal organizations work best when the organization is smaller and the scale of changes being attempted in a landscape is smaller and incremental in nature. Changes of these types would include addition of features, removal of defects and overall enhancing the existing applications.

Since the number of people involved in the informal organizations is smaller, it is easier to get the required support for the change or the transformation and if the sponsor is powerful enough, it is easier to get funding for the projects/programs with minimal bureaucracy.

With the informal organizations, I have found it difficult to build a longer term program lasting more than three to five years. Since the support base is small the support to the project or programs may be lost due to changes in organization impacting a few key supporters. Long projects and programs sometimes outlast the sponsors and supporters. Having a broader support base consisting of multiple key people in the executive team is better for a larger project or a program.

The formal organizations (business partner & landscape steering committees) provide the basis to create the broader support base for larger initiatives. It is possible to understand and accommodate multiple agendas and direction from multiple key stake holders using the formal organization structures. This ensures a much wider support base that is likely to survive throughout the lifecycle of the projects.

These formal structures may require more management and bureaucracy. However, the resulting wider support for longer periods makes it worthwhile for larger projects and programs with wide global impact.

In the next article of this series, I will focus on the key inputs that the project initiation groups gets and the key deliverables of the project initiation group.

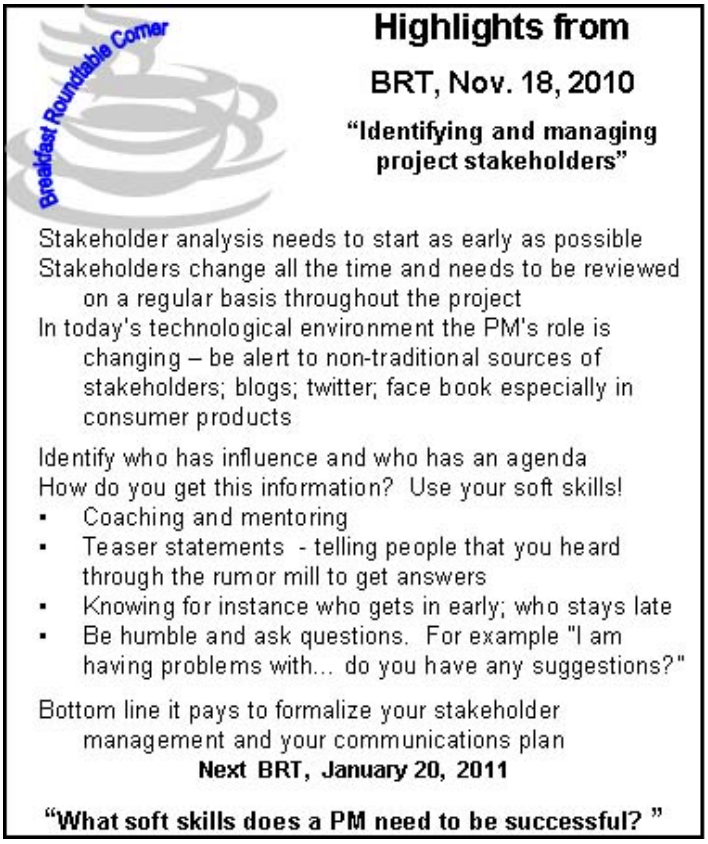
Letter from the President (continued)

In his blog on leadership, George Ambler notes "When people share and believe in a vision of what the organization can be, they generate tremendous energy, excitement, and passion. ... There is a strong sense of trust and respect. Managers don't try to control. They let others assume responsibility because they know everyone shares the vision and is clear about their goals and direction." (http://www.thepracticeofleadership.net/2007/09/24/the-three-key-components-of-a-compelling-vision/).

A key vision that I have for the Westchester chapter is that we will help the PMs in our community develop their ability to articulate and instill a compelling vision for their project efforts. We can do that by addressing this in our chapter meetings and programs. Indeed, this will be a major subtheme of our 2nd Annual Professional Development program on April 2nd. We can also do this by providing a clear vision for each of our own programs, so that all participants understand why and not just the how.

See you at the January Chapter Meeting!

Duff Bailey, PMP
President, PMI Westchester



Typical Risk Process Problems

A Risk Doctor Briefing Note

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A recent Risk Doctor Briefing listed eight steps as essential components of a basic risk process. These are: (1) Getting started (risk process initiation), (2) Finding risks (risk identification), (3) Setting priorities (risk assessment), (4) Deciding what to do (risk response planning), (5) Taking action (risk response implementation), (6) Telling others (risk reporting), (7) Keeping up to date (risk reviews), (8) Capturing lessons (risk lessons learned).

Although logically this sequence of steps makes good sense, many organizations often do not include all eight steps in their risk process. There are three important ways in which the typical risk process is flawed.

The most significant problem is a failure to turn analysis into action. Despite agreeing risk responses and allocating actions to Risk Owners, it is common for nothing to get done. One reason for this lack of action is that most risk processes do not have any formal "Risk Response Implementation" (step 5 in the list above). Instead we just hope that Risk Owners will do what we ask and complete their agreed actions. One way to encourage action is to make a clear link between the work plan and risk responses. Risk actions need to be treated in the same way as all other tasks, with an agreed owner, a budget and timeline. Then they should be included in the plan, reported on and reviewed. If risk responses are seen as "optional extras" they may not receive the degree of attention they deserve. Without "Risk Response Implementation" it is likely that many risk responses will not happen and risk exposure will be unchanged.

Secondly it is common not to have a separate focus on "Risk Reporting" in the risk process (step 6), despite everyone saying that communication is really important. Instead the risk process produces its outputs, usually the Risk Register and one or more risk reports, and we hope that anyone interested in risk will find what they need in these documents. It would be much better to have a structured approach to risk communication. This should produce tailored risk outputs that present specific risk information to particular stakeholders, telling them what they need to know. This will also encourage each stakeholder to use the results of the risk process to help them do their job better, with risk-based decision-making and action. A specific "Risk Reporting" step will make sure that this communication happens.

A third equally vital flaw in most risk processes is the lack of a "Risk Lessons Learned" review (step 8). This is linked to the wider malaise of failure to identify lessons to be learned at key points such as the end of a project or after a significant business decision. Not capturing these lessons denies the organization the chance to learn from its experience and improve performance in future. There are many risk-related lessons to be learned in each uncertain situation, and the inclusion of a formal "Risk Lessons Learned" review will help to capture these, either as part of a more generic review meeting or as a separate event. Such lessons include identifying which threats and opportunities arise frequently, finding which risk responses work and which do not, and understanding the level of effort typically required to manage risk effectively.

So perhaps there is still something new to be said about the risk management process. Despite our long history in attempting to foresee the future and address risk proactively, we would do better if we addressed these weak spots in the risk process. If your risk process is missing steps 5, 6 and 8, then you might like to consider including them. This will make sure that agreed risk responses are actually implemented, that each stakeholder receives useful information from the risk process, and that the organization learns risk-related lessons to improve future performance. These simple and practical additions will enhance the effectiveness of your risk process, and help you succeed more often.

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).

The PMI Westchester Job Club – The Need for a Project Manager

Turbulent economic times generate ideas on how to help others. With an abundance of project managers out of work in 2009, Duff Bailey, President of the PMI Westchester Chapter, saw the need for a Project Manager Job Club that would serve as a source to help fellow project managers seeking employment. This club functions as a networking source for its members, but also provides support and comfort in helping deal with the stress of unemployment. Volunteers run the club with a small group serving as the organizers for meetings and club events. The only requirement for membership is having worked as a project manager; the club is free to all members.

Duff served as the club's first lead organizer until he found his new position. For the almost two years that the club has been in existence, numerous members have volunteered their time to ensure its existence. Since the club is self-perpetuating, we always welcome people who will volunteer to serve as an organizer. One of the inside jokes of the club is "I hope that I don't see you at the next meeting" which translates into a person landing a job.

The club philosophy is very simple: provide members with the tools they need to find their next position. These tools include tips on networking, writing a resume and cover letter and having a successful face-to-face interview. The old adage of practice makes perfect is another mantra for the club. At meetings, we practice interviewing, introductory speeches (also known as an elevator speech), resume writing and other pertinent job hunting activities. We also do in-house workshops, including creating a value proposition, mock interviewing, resume writing, and delivering an elevator speech.

Guest speakers, experts in their respective fields, bring important career transition information to PM Job Club. Excellent speakers well versed in networking, social media, the ins and outs of job hunting and many other topics have provided members with further insights into conducting and landing a job. Recently, Abby Kohut, of Absolutely Abbey fame, talked to the group about the use of social media in the job hunting process. Donna Held, a recruiter, gave a frank and honest talk about recruiting based on her experiences. Bill Cusano demonstrated the power of storytelling during an interview.

The Club had its first annual picnic this summer to maintain connections between club graduates and current members. The picnic was a great success and enjoyed by all. The organizers are also planning on having another get together sometime in the first quarter of 2011 to continue the practice of keeping in touch with alumni.

One of the most important aspects of the Job Club is the comradeship and openness that is displayed among the members. The atmosphere is relaxed; people want to help each other. Many a time, jobs have been found through referrals by a fellow club member. Job leads are also posted on our Meetup site again promoting sharing among the group. We utilize the philosophy of pairing members to give support between meetings and encourage job hunting activities.

Here are some of the club's impressive 2010 statistics:

- Landings: 21
- New members: 64
- Total membership: 99

The PM Job Club meets every other Friday from 8:00 am to 10:00 am. We have two excellent venues where meetings are held alternating between Greenburgh Town Hall and Fordham University (West Harrison campus). If interested in joining this fantastic group, please go to our Meetup site (http://www.meetup.com/Westchester-Project-Managers-Job-Club) click on the "Contact Us" button, we will get back to you with more club information.

We hope to see you at the next meeting.
PM Job Club organizers

New Chapter Members and PMPs

PMI Westchester would like to welcome the following new chapter members and congratulate our newest PMPs.

NEW CHAPTER MEMBERS

Mr. Albert A. Accatino, PMP
Ms. Marra C Berlin
Mr. Seth Copeland
Mr. Ly Cong Dang
Mr. John P D'Arminio, PMP
Ms. Jeanne M. Koproski
Ms. Erika M Lestingi
Mr. Marc Lotti, PMP
Mr. Mark Troncone, PMP
Ms. Judith M Ventola
Ms. Maryann Welsh
Ms. Elizabeth Wruszek, PMP

NEW CHAPTER PMPs

Ruta Marija Cole, PMP
Mr. Narasimha Ganti, PMP
Ms. Maureen Huggard, PMP
Mr. Pushkar K. Upakare, PMP
Ms. Kavitha Vel, PMP

Agile – Ugh…Not Again!! Please read this one last article

Stacey Berlow is a software product consultant and founder of Project Balance, a practice focused on helping companies address the challenges inherent in developing software and managing IT projects. With over 18 years of product and project management and she has successfully directed multi-million, large-scale, multinational, and offshore IT development projects. Stacey is a member of the Westchester PMI Chapter and lives in White Plains, NY.

I'm really into using Agile techniques for my projects. I'm think that my projects (for the most part) are really successful; meaning that the stakeholders are delighted with the end product and schedules and costs are adhered to. For me, Agile is all about producing completed and usable "work product" and closing the communication loop with the customer. The basic steps suggested by PMBOK pretty much still apply – you should still do a project charter and put together a project plan including a schedule, budget, communication plan, risk management plan, etc. I do this for my projects and it's an essential starting point. Where Agile differs from PMBOK is in the management approach itself. During the project, Agile requires an iterative approach such that at the end of each iteration there is completed work product and the customer reviews it. At the end of each iteration the customer can decide if the pre-planned set of work should be done next, or if there should be any adjustments.

Here are some suggestions on how to apply Agile techniques to your projects:

1. When you set up your initial schedule, make sure that your customer is part of the discussions. Ask you customer to prioritize the project outputs in terms of the business value to him/her. Set up your schedule so that the most important features or documents are worked and completed first.
2. Once you know the order of the work activities, set up your schedule so that milestones come anywhere from 2-6 weeks apart, depending on the size and complexity of your project. At each milestone, there should be completed work product output. In this way, you are actually setting up an iterative schedule. At each milestone/iteration, you can see tangible work output at short intervals and get a solid understanding of the project variances.
3. Don't mark an activity complete until it is 100% done. With an understanding of "done" within your team, work must be completed in order to measure the progress.
4. At a milestone, make sure your customer reviews and gives feedback on the work output. If the customer requests changes, determine if those changes will be done immediately in the next iteration or will wait until a future iteration. If the customer add new features or other work, again determine the priority and then which iteration the work will be completed. With added work product, your customer is increasing the project scope. Assuming the resources stay constant, this will increase the overall scope, lengthen the schedule and change the estimated completion iteration. Ask the customer if he/she will take something off of the work queue or tell him/her how many additional iterations the project will now take.
5. If your schedule starts to slip (as projects are known to do), look at the work already completed and asks your customer if there is "enough" work product completed to start using the end product. In many projects the scope can be reduced to meet a hard date. Because the customer has been involved from the beginning of the project, he/she knows the status and what has been already been approved and produced. Furthermore, the customer has directed the team at each iteration to produce the pieces with the highest business value. Therefore, if there is a hard date for the delivery of the product, then it may be the case that the customer can use the product with a reduced number of features or work product output because the most important pieces may already be completed.

If you can apply one or two of these techniques to your projects, you are on your way to managing projects in an Agile way.

For more information or to ask questions, send email to sberlow@projectbalance.com

Chapter Meeting – January 11, 2010, 5:30 PM - 7:30 PM

Topic: Making Project Management Agile

There has been a lot of interest and hype about "Agile". In this session Stacey will talk about the underlying agile concepts and how you can immediately apply these concepts to your projects. With a few adjustments to how you manage your projects you will see increased productivity and happier customers.

Featured Speaker – Stacey Berlow, Project Balance

Stacey Berlow is a software product consultant and founder of Project Balance, a practice focused on helping companies address the challenges inherent in developing software and managing IT projects. With over 18 years of product and project management experience and she has successfully directed multi-million, large-scale, multinational, and offshore IT development projects. Her background includes healthcare, insurance, and manufacturing industries. Ms.Berlow spent 3 years in China where she consulted with small and large IT software services companies and now lives in Westchester County, New York.

Location

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

Agenda

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)

Fees

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

Career Corner - Watch our website for details

Vendor Corner - Watch our website for details

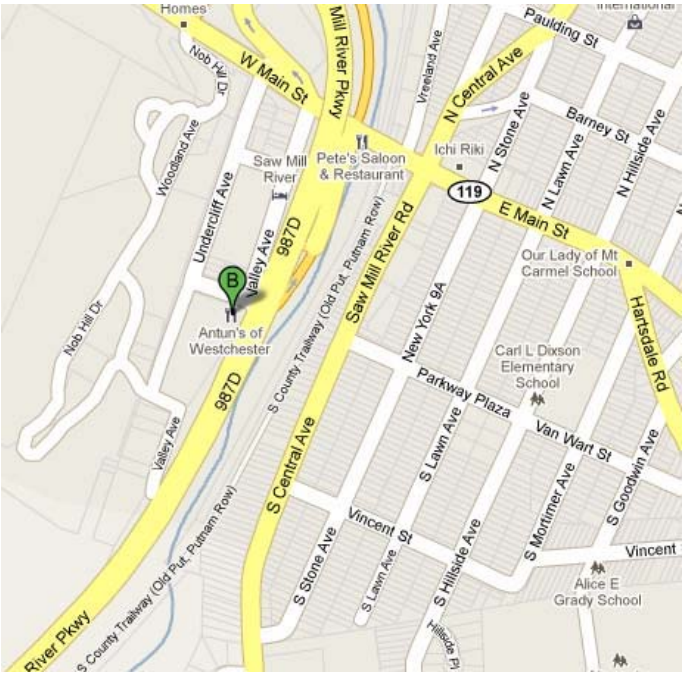
Directions:

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.

Map to Antun's of Westchester



Upcoming PMI Westchester Events

January Breakfast Roundtable Meeting
Topic: What soft skills does a PM need to be successful?
Facilitator: Tom Smith
Date: Thursday, January 20, 2011 – 7:30 to 8:45 AM
Location: 108 Corporate Park Drive, White Plains, NY (off Westchester Ave) Cafeteria – Lobby Level – 2 Buildings down from Malcolm Pirnie
Breakfast available for purchase at the cafeteria

February Chapter Meeting

Topic: Using Thinking Styles to Improve Project Team Performance
Speaker: Catherine Cassidy, CEO, Martin Training Associates
Date: February 8, 2011
Location: Antun's of Westchester, 35 Valley Avenue, Elmsford, NY 10523 914-592-5260

February Breakfast Roundtable Meeting
Topic: Grab Bag Topics
Facilitator: Doreen DePass
Date: Thursday, February 17, 2011 – 7:30 to 8:45 AM
Location: 108 Corporate Park Drive, White Plains, NY (off Westchester Ave) Cafeteria – Lobby Level – 2 Buildings down from Malcolm Pirnie
Breakfast available for purchase at the cafeteria

PMI Westchester Education

PMP Exam Preparation Study Series
Dates: Mondays, February 14 – March 28 (No class on 2/21/2011)
Time: 6:30PM to 8:30PM
Location: BOCES Center, 44 Executive Drive, Elmsford, NY 10523
Light dinner is provided
Cost: $300 Westchester Chapter Member, $375 Non-Chapter Members
Register online:
http://www.pmiwestchester.org/pmiprodev.asp
For more information contact:
education@pmiwestchester.org

Topic: PMP Exam Preparation Class

The Westchester Chapter of PMI is pleased to announce another PMP Exam Preparation course which will assist the PMP Certification candidate in preparing for the PMP Exam, the four hour exam required for this valuable globally recognized credential. This course will be offered on the Westchester campus of Iona College in New Rochelle, NY.

PMP Exam Preparation Class
Dates: Saturdays, February 26 – May 7 **(No Class on March 12, April 23)**
Time: 8:00AM to 12:00PM
Location: New Rochelle Campus of Iona College, 715 North Ave, New Rochelle, NY 10801
Instructor: John Sherlock, MS, MBA, PMP -- an accomplished and credentialed Project Management professional with over 30 years experience in the financial, telecommunications and automotive industries. In addition to his current position as a Project Manager for Volvo Cars of North America, John Sherlock is a PMP, a Certified Six Sigma Black Belt, a Certified Six Sigma Instructor and an Adjunct Professor in the Iona College graduate program.
Fees: ***(Early Bird)***
$800 Westchester Chapter Member;
$900 Non-Chapter Members
(After February 10, 2011)
$900 Westchester Chapter Member;
$1000 Non-Chapter Members

Register online at:
http://www.pmiwestchester.org/pmiprodev.asp
For more information contact:
education@pmiwestchester.org

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 editor listed below:

Brenda Horton – Chief Newsletter Editor
newsletter@pmiwestchester.org