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Volume 26, Issue 7



### Thought for the Month

Remember - PMI-Portland is a volunteer organization and works only because of the dedicated efforts of our volunteers. Have you thanked a volunteer today? Have you considered serving your Chapter as

## 2008 Excellence in Project Management Awards

The PMI-Portland Chapter initiated the first annual "Excellence in Project Management" Award in 2005 to acknowledge, honor, and widely publicize project teams for superior performance and execution of exemplary project management for projects completed during the previous year.

We are happy to announce that the winner of the 2008 Award goes to:

### ***Oregon Department of Environmental Quality***

#### Project Name

Tracking, Reporting & Administration of Air Contaminant Sources (TRAAACS) Project

#### Project Description

Oregon DEQ is delegated by the US Environmental Protection Agency (US EPA) to operate the Title V air discharge permit program and is also directed by State law to operate an Air Contaminant Discharge Permits (ACDP) program for smaller pollution sources. The TRAAACS project involved reengineering business processes and implementing an

*(Continued on page 8)*

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## Chapter Meeting

September 16, 2008

**Educational Presentation:** Building Readiness For Change Through Communication: The Project Manager's Role, Tim Rahschulte, assistant professor at the George Fox University School of Management

**Keynote Presentation:** What Kind of a Leader Are You? John Patton, PMP, President and CEO, Cadence Management Corporation

**Sponsored by:**



**Register online** by Sun. 09/14/2008

[Click here for details](#)

## The President's Corner

Summer is winding down, the kids are back in school, and it is time for PMI-Portland to initiate this year's activities. I love this time of year—along with the nostalgia and the end of summer frenzy, there is that fall tang in the air that energizes me; makes me look to new beginnings—so welcome to new beginnings from PMI-Portland.

Your new board of directors was busy over the summer break. We had a day-long transition meeting the end of June and a day-long strategy session in August to allow the leadership team to start forming and planning for the year.

As I talked about in my President Elect transition letter in the June Newsletter, my focus this year is visibility and customer service. As a team we expanded on these themes at the strategy meeting and determined the goals for the year to engage local corporate leaders (visibility) and increase delivery of value to members (customer service). Our challenge now is to define how we are going to meet these goals. We have a good start on the definition with each of the portfolio leaders establishing a tactical plan to guide the portfolio throughout the year. This will be an ongoing and frequently revisited effort as both strategy and tactics should be a journey not a destination.

Falling right in line with our goal of delivering value to our members, thanks to Shellie Gaddie, President Elect of the Puget Sound Chapter, we have the opportunity to hear Dr. Janice Thomas present the preliminary results from the three-year PMI sponsored research study on the Value of Project Management. To take advantage of this opportunity, we are moving the November Dinner Meeting to November 11<sup>th</sup>. Be sure to mark your calendars.

This would be a good meeting for you to invite your boss to attend also—which would help further our goal of engaging local corporate leaders and increase local corporate awareness of the value of project management for furthering corporate goals. You can find more details about the study on [www.pmi.org](http://www.pmi.org) and the September and October PMI Today publications.

And speaking of visibility for local corporate leadership, several PMI-Portland volunteers, George Walker, Alan Strong, Shery Phillips, and Srividya Sankaran, were on hand at the Oregon DEQ Headquarters in Portland to present the 2008 Excellence in Project Management Award (EPMA) traveling trophy to the DEQ TRAACS project team at their awards ceremony August 12. Look for more information on the 2008 EPMA award in this newsletter.

You can earn executive recognition for your project team by participating in the 2009 EPMA program. Keep the program in mind as you complete your projects this year and watch for details about the competition later in the year.

On behalf of your chapter leadership, welcome to the 2008/2009 PMI-Portland Chapter activities. We are proud to be serving the Chapter as your Board of Directors and look forward to an exciting year.

Thank You,

Dianne Johnson, PMP

### November Dinner Meeting Moved to November 11

Invite your boss and come to hear Dr. Janice Thomas present the preliminary results of the three-year PMI sponsored research study on the Value of Project Management. She spoke at the PMI Warsaw Congress in July; she will speak at the Denver Congress in October. You've been reading about the study on the PMI website and the August and September issues of PMI Today.

**Don't miss this opportunity!**

November 10, she will speak at the Puget Sound Chapter Meeting. November 11, she will speak at the Portland Chapter Dinner Meeting.

## Our Meeting Sponsor

PMI-Portland extends a heartfelt "Thank You" to **Cadence Management Corporation** for its recognition of the importance of professional development for project managers and sponsorship of this month's chapter meeting.

In the last 25 years, **Cadence Management Corporation** has helped hundreds of organizations and thousands of project managers to reach success through project management. Today, organizations around the world count on Cadence training, in-depth consulting, and innovative supporting tools, to provide structure and discipline to projects, and to help them deliver more with less. From locomotives to PCs, financial services to medical equipment, spacecraft to coffee, Cadence is in the products and services that touch the world every day.

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## Events Calendar

Mon	Tue	Wed	Thu	Fri	Sat / Sun
September 1	2 PDX Board Meeting	3 PMP/CAPM Exam Prep	4	5 SOUTH Roundtable	6 7
8	9	10 Free Agile Training PMP/CAPM Exam Prep	11 Free Agile Training	12 NW Roundtable	13 14
15	16 PDX Chapter Meeting	17 Central OR Rdtable (@ COCC) Salem Lunch Meeting PMP/CAPM Exam Prep	18 Eugene Meeting PMF Luncheon	19 WEST Roundtable Corvallis Lunch Meeting	20 21
22 PMP Bootcamp	23 PMP Bootcamp	24 MIDDAY MIDWK Rdtable PMP/CAPM Exam Prep PMP Bootcamp	25 PMP Bootcamp	26 NORTH Roundtable PMP Bootcamp	27 28
29	30	October 1 PMP/CAPM Exam Prep	2	3 SOUTH Roundtable	4 5
6	7 PDX Board Meeting	8 PMP/CAPM Exam Prep	9	10 NW Roundtable	11 12

For details, click here for the [PMI PDX Web Calendar](#)

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## May—August\* Membership News

### Welcome New Members



Derek Abrams  
Lokesh Aggarwal  
Terry Anderson  
Sondra Arnwine  
Terri Barczak  
Catherine Barnes  
Lynn Baumgardner  
Michael Beck  
Steven Benjamin  
David Blackledge  
Luther Boorn  
Sylvia Borrer  
Diane Brady  
Shannon Buss  
Marilee Butry  
William Carruthers  
Toby Chamberlain  
Lane Christophersen  
Jesse Combs  
Peter Corduan  
Caldwell Crawford  
Adriana Cutar  
Jeff Darden  
JoNell DeMars  
Donna Dennis  
Justin Devers  
Jo Diamond  
Mary Beth Dowling  
Bob Dragoon  
Ronald Elven  
Murat Erdogan  
Laura Ernst  
Judith Estep  
Timothy Fox  
Karen Gates  
Kathy Gebert  
Melinda Geist  
Frank Heaton  
Charles Herson  
Kathleen High  
Nancy Hornschuch  
Andrea Howard  
Louesa Isett  
Ganesh Kannan  
Daniel Kent  
Carrie Kolstad

Pamela Lam  
Sarah Laughlin  
Wendi Leer  
Brett Leibbrandt  
Chris Levitt  
Sandra Linnerud  
Adrienne Martocello  
Terrance McDonald  
Margaret McGovern  
Andrew McKnight  
Douglas McMillen  
Carol Miller  
John Molamphy  
Sangeeta Mudaliar  
John Vincent Nerikaat  
Levin Nock  
Mark Noneman  
John Paulson  
William Poling  
Nathan Potter  
Jeffery Reilly  
Cary Riker  
Scott Ritter  
Nancy Robbins  
Cherri Roden  
Jeff Roller  
Chris Rupp  
Jerry Schlesinger  
Sara Schulte  
Barry Scott  
Mary Lou Sharp  
Clay Smith  
Thomas Spurling  
Phil Stenstrom  
Kurt Stepke  
Megan Strand  
Hayssam Taha  
Leslie Taylor  
Steve Thornton  
Julie Toll  
Debra Townsend  
Canh Tran  
Rebecca VanderMalle  
Dylan VanDetta  
James Walker  
Sarabjeet Waraich  
Robin Washington  
Aaron Wheatcraft  
Chris Wilen  
Troy Wilson  
Steven Wong  
Jonathan Yudman

### Congrats New PMPs

Brian Addington, CAPM  
Bruce Andrus-Hughes, PMP  
Melissa Bidstrup, PMP  
Bryan Blake, PMP  
Hugh Boyette, PMP  
Frederick Brumble, PMP  
Gay Calonge, PMP  
Christian Casebeer, PMP  
Karen Cooper, CAPM  
Jo Diamond, PMP  
Mary Beth Dowling, PMP  
Ronald Elven, PMP  
Murat Erdogan, PMP  
Timothy Fox, PMP  
Bernard Froidcoeur, PMP  
Angel Garcia, CAPM  
Joshua Gardner, PMP  
Melinda Geist, PMP  
Dennis Hurlbut, PMP  
Sarah Hutchinson, PMP  
Janine Jennings, PMP  
A. Lynn Jesus-Olhausen, PMP  
Marla Jibben, PMP  
Julie Kennedy, PMP  
Daniel Kent, PMP  
Rebecca Kun, PMP  
Denis Lee, PMP  
Sandra Linnerud, PMP  
Christine Lorentz, PMP  
Lizette Luke, PMP  
Terrance McDonald, PMP



Ginny McKee, PMP  
Carrie McKenzie, PMP  
Nicusor Mihai-Lazar, PMP  
Carol Miller, PMP  
Daryl Nishida, PMP  
Kathrine Popovich, PMP  
Cheryl Riel, PMP  
Clay Smith, PMP  
Darren Starr, PMP  
Phil Stenstrom, PMP  
James Sullins, PMP  
Corey Taylor, PMP  
Brian Tharp, PMP  
Julie Toll, PMP  
Steve Turner, PMP  
Amy Walker, PMP  
Sarabjeet Waraich, PMP  
Tami Williams, PMP

\* Membership information is provided to the chapter monthly by PMI Headquarters. There may be a 1 to 2 month delay due to newsletter publishing constraints. Contact PMI Headquarters at (610) 356-4600 or [www.pmi.org](http://www.pmi.org) to change or manage your membership information.

### Thanks Chapter Renewals

There are too many chapter renewals to include in this newsletter. Nevertheless, we want to thank our continuing members for their ongoing support and commitment.

As of the end of July, PMI Portland had **1205 active members**.

You come from Oregon, Washington, Hawaii, Saudi Arabia and Japan. You work at AAA, City of Portland, Fred Meyer, at home, Intel, Mentor Graphics, NW Natural, PacificCorp, the Standard and Xerox. You work in Academia, Consulting, E-business, Finance, Machinery/Metals, Public Relations, Research, and Web Technology.

Keynote Presentation

Chapter Meeting

## What Kind of Leader Are You?

### Leadership Characteristics of Great Project Managers

Lee Iacocca has weathered the rough seas of business for decades. His ouster and antics in the automotive industry made headlines around the world. But, what has been long overshadowed by his more public persona, is Iacocca's vast skill behind the scenes as project manager. In his latest polemic, "Where Have All the Leaders Gone," Iacocca highlights his "9 C's" of leadership, values all leaders must develop and cherish to achieve success in an increasingly complicated world.

Cadence Management Corporation President and CEO, John Patton, brings a critical eye to Iacocca's "9 C's", showing how each becomes a powerful tool for the successful project manager. To John, the greatest leaders in an organization are those who deliver substantial results through projects.

Join us for this interactive discussion of Iacocca's 9 C's at the PMI-Portland Chapter dinner meeting, and find out just what kind of leader you are.

**John Patton, PMP**, is President and Chief Executive Officer for Cadence Management Corporation. John founded Cadence in

1983, after a successful career in IT and electronics. In addition to the duties of the CEO, for the past four years, John has headed the company's Global Solution Provider program, a network of training and consulting companies licensed and certified to provide Cadence services in Asia, EMEA and the Americas.

John is a graduate from the University of Oregon with a degree in Arts and Sciences, an MBA from Portland State University, and a Diploma in Hispanic Studies from the University of Barcelona. He is a certified Project Management Professional (PMP) by the Project Management Institute, and an active member of PMI. As a volunteer leader for PMI, John is currently Chair of the Certification Committee for OPM3® product suite, PMI's product for Organizational Project Management Maturity Model. John is a regular panelist at the PMI Global Research Working Sessions, and a frequent guest speaker for his expertise in project and program management, linking projects to company's strategic goals.



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and Guard Band to perform  
Newport. See E&A, Page B1

Skateboard win  
Kawabata wins skateboarding competition  
in Newport. See Sports, Page C1

"Whale-Its Spirit"  
Sculpture dedication in Clatsop  
Park Aug. 5. See Community, Page B4

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## Educational Presentation

## Chapter Meeting

## Building Readiness For Change Through Communication

### The Project Manager's Role

Effective communication has long been a challenge for project managers and their teams associated with successfully bringing about organizational level change. Communication is not getting any easier for project managers – projects are increasingly complex, have increasingly diverse stakeholder groups, and are expected to operate efficiently with fewer resources than ever before. These realities pressure project managers and organizational leaders to be even more effective with the challenging aspects of communication.

It has been well documented that communication can serve as an effective means to help projects succeed. Certainly, frequent communication is critical for the success of all projects. However, the means to ensure an effective communication strategy, tactics, and actions relative to the needs of an organization are not always so obvious. This presentation outlines an effective communication approach (learned in one industry and successfully leveraged for another) that address the pressures faced by project leaders. Specifically the question, “How do effective project managers plan and execute communications in a complex environment as a means of intervention to successfully complete projects and realize sustained organizational change?” is answered in this session.

### About the Presenter



Tim Rahschulte is an assistant professor at the George Fox University School of Management. He teaches a number of courses in the doctor of management program and the capstone, Transformational Leadership, course in the master of business administration program. His areas of research include organizational change, human resource development, and leadership. Additionally, Rahschulte consults with the State of Oregon on matters of organizational change as a

business transition architect. He earned a BA in economics/business administration from Thomas More College, a MBA also from Thomas More College, and a PhD in organizational leadership and human resource development from Regent University. He has recently had papers published in Human Resource Development Quarterly; the International Journal of Knowledge, Culture, and Change management; and Effective Executive. He has also accepted a presentation role at this year's PMI Global Congress in Denver, Colorado.

## Upcoming Chapter Meetings!

OCTOBER 21

NOVEMBER 11 – DATE CHANGE!

## Chapter Meeting Logistics

- 4:00 Registration Table Opens
- 4:30 [Educational Presentation](#)
- 5:30 Networking
- 6:30 Dinner and Announcements
- 7:00 [Keynote Presentation](#)

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- **PMI Members** - Keynote Presentation \$25, Educational presentation \$10, Both for \$35
- **Non-Members** - Keynote Presentation:\$30, Educational presentation \$10, Both for \$40
- **Student Members** - Keynote Presentation \$10
- **Student Non-Members**—Keynote Presentation \$15
- **Keynote Presentation only**  
(without meal) - \$12

### Pre-register for best price!

Price is \$5 more at the door.

### No refunds within 24 hours of the meeting

Contact the [Director of Registration](#) for registration questions.

A professional photographer will be on-site to document Chapter Meeting events and



## Fall PMP/CAPM Classes

The fall PMP/CAPM exam prep class is underway. Classes are held at Keller Graduate School of Management (DeVry University) in Beaverton, Wednesday evenings from 6:00 – 9:00 PM followed by an all-day review on Saturday November 15th. Good attendance in the course satisfies the education requirements for both the CAPM and PMP application. This is an excellent opportunity towards achieving your CAPM / PMP certification and improving your career marketability.

For more information, or to register, go to [www.pmi-portland.org](http://www.pmi-portland.org) and select Education. Chapter/PMI members will receive a \$100 discount. Sign-up now, seating is limited.

*Earn 1 PDU for attending!*

## Portland Area Roundtables

### NW Breakfast Roundtable

#### Con-Way

2055 NW Savier, Portland

Ask at desk for room

2nd Friday 7:15-8:45 am

### NORTH Breakfast Roundtable

#### Clark Public Utilities

1200 Fort Vancouver Way, Vancouver  
Community Room

4th Friday 7:15-8:45 am

### MID-DAY MID-WEEK PDX

#### Roundtable

Harland Financial Solutions  
400 S.W. 6th Avenue, Portland  
Ground Floor

4th Wednesday Noon-1:00 pm (NEW)

### WEST Breakfast Roundtable

#### Nike World Headquarters

Nolan Ryan Bldg, Air Huarache, 1st floor, Beaverton (NEW)

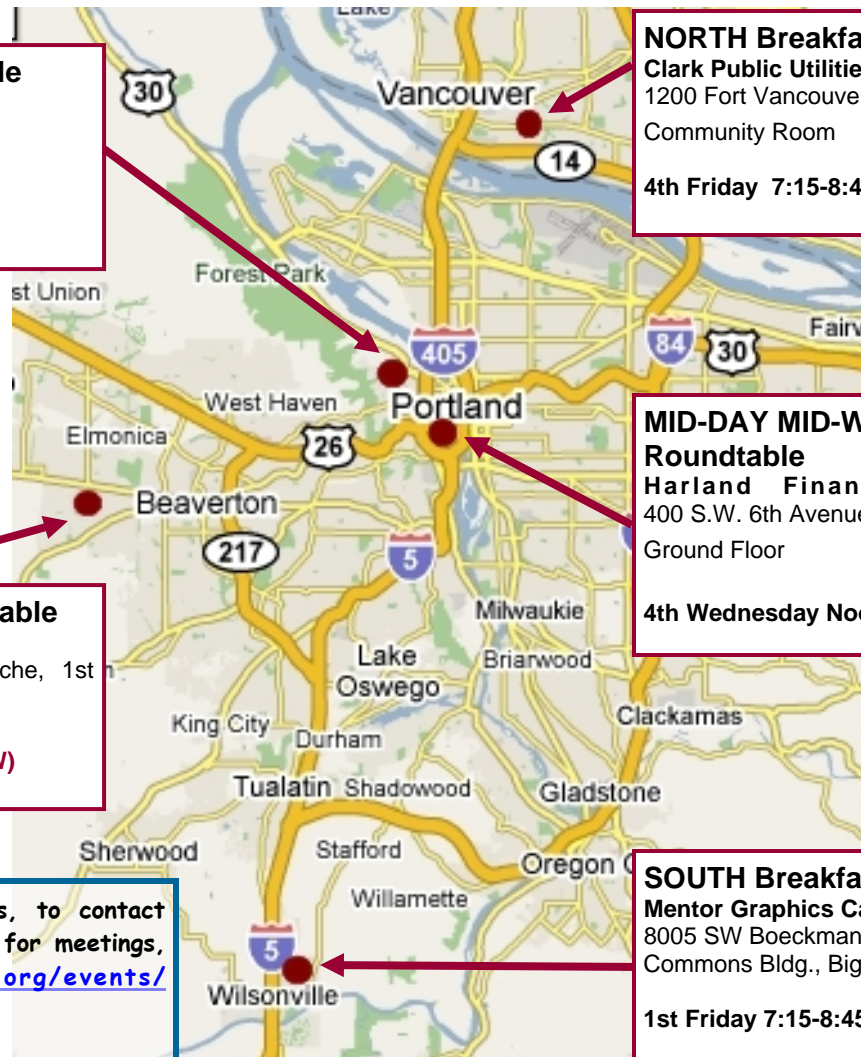
3rd Friday 7:30-9:00 am (NEW)

### SOUTH Breakfast Roundtable

#### Mentor Graphics Campus

8005 SW Boeckman Rd., Wilsonville  
Commons Bldg., Big Muddy Conf. Rm.

1st Friday 7:15-8:45 am



For more information, maps, to contact the moderator, or to RSVP for meetings, see [www.pmi-portland.org/events/meetings/roundtables.htm](http://www.pmi-portland.org/events/meetings/roundtables.htm)

## Roundtable Events Draw Positive Reviews

Nike and Con-way moved to larger rooms to accommodate the early morning discussions, and each location has developed an individual character. Recurring members foster candor, discussing shared challenges in diverse industries and cultures, providing experience benefiting all participants.

Here at Con-way, we are working thru the Agile Development process, and the feedback, suggestions, observations, and shared resources have improved our agile adoption. We've heard what works, and what doesn't, helping us along the agile maturity model.

We all know that Project Management tools and techniques are no "silver bullet" for business delivery. The challenges of leading change in your organization are probably similar among our colleagues, and this forum provides a recurring source of new ideas, lessons, and experience.

George Walker, past president of the Chapter, collected over 1,000 discussion topics, and the list continues to grow as we meet each week. You see themes developing that are not covered in

the PMBOK, but support the framework in a different dimension: Influencing and its importance; Credible project metrics; infusing best known methods into your organization; Retrospectives – more than a post-mortem; educating your sponsor; enabling creativity;

Book discussions include Flawless Consulting, First 90 Days, Good to Great, and the upcoming "Crucial Discussions," by Paterson et al, and bring surprisingly varied perspectives.

What brings me to the table at this unreasonable hour is the spirit of shared conviction toward improving our knowledge of the PM discipline and developing our skills in new areas.

Harland Financial will host a Noon Roundtable at their downtown location, 400 NW 6<sup>th</sup> Avenue, on September 24. Bring a lunch or grab one in the café, and join the conversation. See you there.

**Bruce Rosenblatt**, Director of Roundtables

## PMI Portland News

### EPMA Awards 2008 (From page 1)

information management system to track and manage permit applications, permit conditions, emission inventories, permit compliance and invoicing for the regulated Title V and ACDP contaminated sources. TRAACS, a client-server, Microsoft .NET, Microsoft SQL Server based application, replaced two large-scale legacy information systems and several smaller satellite applications.

A contractor was used to work closely with DEQ business area experts to understand current business processes and functional requirements and facilitate a user-centric, interactive application design process. TRAACS provides DEQ with an integrated source of air quality program data, drastic usability and performance improvements, and consistency with agency application architecture and information management standards.

#### Objectives

1. Integrate air quality business functions and information management into a single application.
2. Design and build a more user-friendly and intuitive application. Slash unused and unneeded features of predecessor systems.
3. Improve data quality.
4. Minimize redundant data entry.
5. Develop an application that is maintainable and designed to enhance flexibility to respond to future changes in business processes.

6. Move to a modern IT application architecture and infrastructure.

**Project start & finish dates:** March '04 – April '07

**Total effort:** \$1.5 Million

On August 12, 2008 a collection of DEQ employees from various regions and programs received the Project Management Institute's (PMI) Portland chapter 2008 Excellence in Project Management Award. The award was accepted by project team leader Ernie Weber, and presented by George Walker, PMI-Chapter past president.

But the award has little to do with the database itself, though the final product more than meets DEQ's needs. Rather, PMI looked at the way in which the database was developed, the application of project management principles and the way in which the team and Windsor, a software development company who assisted with the project, interacted to achieve success.

"The award is a recognition of teamwork for a well run project and for a great result," says DEQ Director Dick Pedersen. "My hat is off to Ernie and the team for receiving a well deserved award and for making DEQ better."

For more information, contact the EPMA team at [awards@pmi-portland.org](mailto:awards@pmi-portland.org).

Photos and some content provided by the DEQ's Office of Communication and Outreach



Receiving the award: (From L to R) – 2<sup>nd</sup> row: Chris Swab, Lewis Lo, Brian Fields, Tina Leppaluoto. 1<sup>st</sup> row: Kathy Amidon, Katina Olson, Brandy Albertson, Bonnie Hough, Andrea Curtis, Patricia Huback, Ernie Weber and PMI President George Walker.



TRAACS project team leader Ernie Weber accepts PMI's 2008 Excellence Award for application of sound project management skills to help DEQ finish the air quality tracking database on-time and under budget.



## Monday Morning Mentoring

## Book Review

### Monday Morning Mentoring – Ten Lessons to Guide You Up the Ladder, by David Cottrell

2006 HarperCollins Publishers 178 pp \$19.95

Written in quick conversational style, this book holds some great pearls of advice that bear repeating throughout our careers. In the tale, Jeff hits a crossroads in his career and some hard times in his department: team member attrition, demanding boss, un-exemplary performance appraisal. He reaches out to Tony, an out of touch friend, now semi-retired and consulting executive working around the county. They agree to meet for ten Monday mentoring sessions with the ground rules of:

- Start and finish on time
- Tell the truth
- Try something different

After an initial situational review from Jeff to bring him up to speed, Tony sets the foundation to fortify Jeff's perceived house of cards. Each chapter of the book represents one Monday session, and I particularly enjoyed Jeff's analogy to reaching success, in the first Monday meeting.

A man is searching for the path to success, and he seeks the wisdom of a guru. He asks "Which way to success?" The guru points off in the distance, without speaking. The man leaves in haste. He returns, bruised and battered at the path he chose, and asks the guru again "Which way to success?" The guru points off in the distance, and again the man rushes out to fast success. He returns once more and asks for additional instruction. The guru points again, but this time says, "**Success is that way, just a little past splat.**"

While not an acronym or fancy consulting word, the connotation behind "splat" describes downward trends at times in everyone's lives. (If you say you haven't hit splat, may I suggest you reflect and make certain you're following ground rule #2 above.)

The chapter titles might give you insight to some of the pearls Tony will teach Jeff:

- Keep the Main Thing the Main Thing – remember Billy Crystals' movie "City Slickers" and Curly's advice to the men?
- Tough Learning – accepting criticism as a learning tool
- The "Do Right" Rule – the manager may be crippling the team's productivity and motivation if fair and reasonable policies are not enforced
- Hire Tough – don't lower your standards to fill a position; you may pay dearly in the end
- Do Less or Work Faster – use the Pareto Principle to your advantage

At the end of each chapter, Jeff summarizes Tony's tips in his notebook. The summary is good reinforcement to the reading. All the tips appear are condensed in the epilogue of the book, and it's in there that I've found myself just opening and reading one or two tips at a time to engrain even further.

The tips include:

- "There are a few things that you can do that will yield better result than doing a whole lot of other things."
- "Enthusiasm is something you can't fake, and it has a tremendous effect on everyone around you."
- "So much of life is about attitude and how we handle what life throws our way. Life is good --- even when a situation appears to be the worst."
- "Give away everything you have learned. If for no other reason, do it selfishly; in order to get more, you must give more."

David Cottrell has written other books to augment professional development for individuals in leadership, education, communication and coaching. He is president and CEO of CornerStone Leadership Institute. His leadership messages have been presented worldwide.

**In Summary:** I found this book a quick easy read; gate to gate on a recent 2 hour flight. It applies to everyday life also.

**Rating:** ★★★★★ (4 stars out of 5)

I can't help but wonder when some of the 1300 local Portland chapter members open up and give advice on how they reached past "splat" at different points in their career, the benefit and value could be achieved by those of us slightly stuck. The Portland chapter is forming a mentoring pilot program this fall. We are in need of people who are interested in sharing their experiences. Please email Kay Pexa at [mentoring@pmi-portland.org](mailto:mentoring@pmi-portland.org), and help people "get past

#### About the Author

**Pam Banning**, PMP, is a PMI Portland member and is our Vice President of Professional Development.

## The Great Divide: Intuitionists v. Formalists

There is an old saying that there are two kinds of people: people who divide people into two kinds, and people who don't. This article is for people of the first kind. Successful project management requires that two very different kinds of people work together to achieve project success. These two types will be called Intuitionists and Formalists.

Intuitionists feel they know their job and just want to get it done. They have little patience for methodologies and theories. Formalists, on the other hand, understand the world by building models with predefined structures that are reusable across projects. Corresponding to these two cognitive types are the software development life cycle approaches that will be referred to here as Agile and Formal.

The current debate over Agile versus Formal methods is driven largely by the split between Intuitionists and Formalists. The depth of disagreement entailed reflects that fact that divergent cognitive styles are in play. The argument over which approach is most effective masks a deeper struggle over how we understand our world.

So, given these realities, how should a project manager proceed to staff their projects? There are three overall strategies:

- Staff entirely with Intuitionists and adopt an Agile approach

- Staff entirely with Formalists and adopt a Formal approach
- Staff using both Intuitionists and Formalists and use a hybrid methodology that provides appropriate roles for both Intuitionist and Formalist.

Each of these approaches can be successful but the latter approach is recommended for the following reasons:

- More often than not, a project must be staffed with existing resources which include both types.
- Formalists form a relatively small minority but bring important disciplines to a project. Good project management will create roles for Formalists that allow them to work effectively with Intuitionists who may not fully understand the value Formalists bring to a project.
- The majority of team members will be Intuitionists and they must be provided the freedom to apply their skills without excessive formal overhead.
- Properly managed, a synergy will be created in which both types inform each other and function more effectively.

The table below notes some of the differences between Intuitionists and Formalists.

	Factor	Intuitionist	Formalist
<b>PM Tasks</b>	Presentations	White boards	Visual Models
	Meetings	Stand up / Informal	Agenda driven
	Planning / Scheduling	Short term	Long term
	Roles	Flexible	Well defined
<b>Knowledge</b>	Semantics	Weak	Strong
	Knowledge is	Intuitive	Formal
	Mathematics	To be avoided	Useful
	Flexibility	High level	Low level
<b>Methods</b>	Standards	Loose	Tight
	Methodologies	Agile	Formal
	Tools	Simple	Complex
<b>Attitude</b>	Attitude	Formalists waste time with needless structure	Intuitionists lack in-depth understanding

**About the Author**  
**James E. Archer** is a PMI Portland member

### Volunteer News

Welcome back to all our members! As we begin our new term, keep an eye out for exciting volunteering opportunities. Currently we have a couple volunteering opportunities. How about volunteering to take photos or helping out at the registration table at our next Chapter meeting on September 16, 2008? This is a great way to earn PDUs. Interested, contact Elisa Mene, Director of Volunteers at [volunteer@pmi-portland.org](mailto:volunteer@pmi-portland.org)

Event Photographer – take pictures at monthly Chapter meetings and other events. FTP photos for use in newsletter and meetings PPTs.

Registration Table – Register attendees at the PMI Portland Chapter meeting. Two (2) 4:00-5:15, Two (2) 5:15-6:30.

# Seven Tips to Make Change Work for You

## You Can't Avoid Change

Customers change their minds. Technology advances. Change is constant, and prohibiting it on projects does not work.

Preston Smith cites thirteen years of data collection by Donald Reinertsen at Cal Tech and concludes, "The concept of frozen requirements is a complete fiction in the real world."<sup>1</sup>

You can't prevent changes to your projects, but allowing rampant uncontrolled change dooms projects. Is there solution to this dilemma?

## Make Change Valuable

Change can be valuable. Companies that react flexibly and quickly can take advantage of market shifts, new technologies, and changing customer desires, giving them an advantage over their slower, less flexible competitors.

To make change valuable, provide two complementary things to your projects:

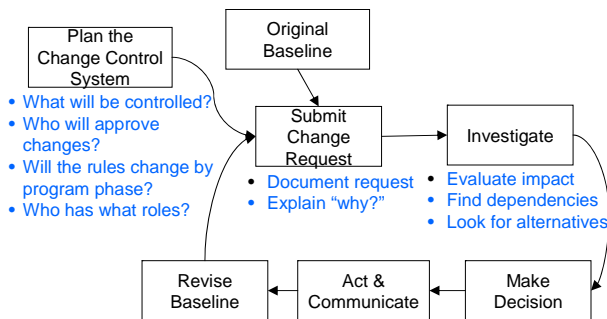
1. A structure that replaces chaos with explicit decisions about changes
2. Enough flexibility to take advantage of necessary or good changes

## Just Enough Structure

A minimal change management structure requires three things: a baseline, a simple change control protocol, and excellent stakeholder management skills.

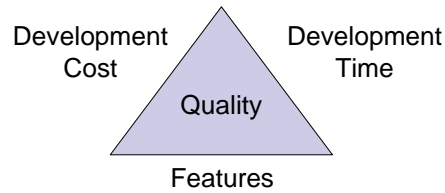
**1 Baseline:** You must have a clear initial baseline even to begin to manage changes. Without it, you have no basis to detect potential changes, analyze whether the benefit is worth the cost, and negotiate who will pay for what.

**2 Change Control Protocol:** This allows you to make well-considered decisions about possible change. It doesn't have to be complicated or burdensome. Figure 1 shows an example protocol that is simple, but sufficient.



**Figure 1: Change Control Steps**

**3 Great Stakeholder Management Skills:** Most changes have consequences, but stakeholders shy away from the hard tradeoffs that come with managing changes. Use the triple constraint, shown in figure 2, to hold a conversation with your stakeholders about the costs and benefits of proposed changes.



**Figure 2: Triple constraint**

## Sufficient Flexibility

The change management structure discussed above is helpful, but how do you stay flexible?

**4 Roll with the Punches:** The simplest way to increase flexibility is an attitude change. Remember that the plan is not cast in concrete – be prepared to abandon or modify it when changed circumstances dictate.

**5 Divide and Conquer:** Break projects into small chunks, each of which delivers something that demonstrably works. Reassess at the end of each chunk. Is the project still on the right course? What work should be next?

**6 Make Waves:** In turbulent environments, the future beyond a short horizon is just too fuzzy to plan with great accuracy. Use rolling wave planning to match the level of planning detail to the amount of certainty about each phase of the program. Start by creating a plan that covers the entire project, but add a crucial twist: make near term plans very detailed, but plan for the later portions of the project at a higher level. As the project moves forward, move the detailed planning window forward, too.

**7 Specify Carefully:** Specify early requirements at a high level, rather than spending energy tying down all of the details. Focus those high-level specifications on desired results, rather than on methods. For example, HP's original DeskJet printer revolutionized home printing in 1988. The three requirements for it were simply "Laser quality print on plain paper for under \$1000," which allowed a breakthrough shift from dot matrix to ink jet technology.

## Endpoint

Change is constant and relentless. To succeed, your projects must combine just enough change management structure to prevent chaos, while simultaneously enabling sufficient flexibility to take advantage of valuable changes. Recently one of my students offered this memorable summary: **"Semper Gumby – always be flexible, but never break."**

1. Preston Smith, Flexible Product Development, Jossey-Bass, 2007, p13.

### About the Author

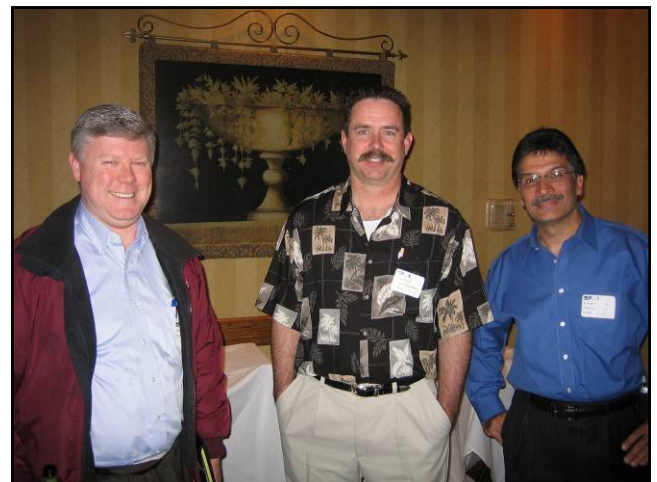
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June 2008 Chapter Meeting

Faces of PMI Portland



Many thanks to Kevin Nichols for the photos



# Volunteer Recognition Event

# Faces of PMI Portland



Want to join the fun? To learn about becoming a PMI Portland volunteer, contact our Director of Volunteers at: [volunteer@pmi-portland.org](mailto:volunteer@pmi-portland.org).

Portland Chapter

Celebrating  
25 Years  
of  
Excellence

1983 - 2008



## About PMI Portland

**Charter** The Project Management Institute chartered the Portland Chapter in January 1983. The Portland Chapter of PMI is a non-profit professional organization dedicated to advancing the state-of-the-art of project management.

**Mission** To promote the profession of Project Management by creating a culture and community that facilitates professional growth through education and volunteerism.

**Monthly Chapter Meetings** Held on the third Tuesday of every month except July and August. Check chapter [website](#) to confirm meeting dates.

**Board Meetings** Held on the first Tuesday of each month.

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**Chapter Web Site** [www.pmi-portland.org](http://www.pmi-portland.org)

**Newsletter** Published monthly except July and August.

**Newsletter E-mail** [newsletter@pmi-portland.org](mailto:newsletter@pmi-portland.org)

**Past Issues** Archived newsletters can be seen at [www.pmi-portland.org/news/newsletter.htm](http://www.pmi-portland.org/news/newsletter.htm)

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