

December 2009



Project Management Institute Portland Chapter

Monthly Newsletter

Issue Highlights

www.pmi-portland.org

Next Chapter Meeting

December 15, 2009

Educational Presentations

Project Inception, by Todd Williams

Improving Project Communication, by Susan de la Vergne

Keynote Presentation

Building Customer Loyalty, by Pamela Cournoyer

Sponsored by



Building Customer Loyalty

Keynote speaker Pamela Cournoyer shares some simple, yet effective customer loyalty strategies.

Don't Miss the Scope Creeps

PMI Portland's own band in their debut performance.

Two Educational Presentations

Come and learn about Project Inception, by Todd Williams, red project recovery expert. Or, Improve Project Communication with the help of Susan de la Vergne.

PMI Portland Workshops

Five workshops are ready for your enrollment, beginning with The Process & Persona of Effective Leadership on December 8.

Improve Stakeholder Relationships

Dr. Jerry Mulenburg PMP, explores the importance of understanding the needs and expectations of stakeholders in order to have a successful project.

Three Definitions of CRM

Learn about three aspects of Customer Relationship Management as it pertains to Project Managers from Bob Buston.

And More...

VP of Membership

The PMI Portland Chapter Board is recruiting a new VP of Membership. If you have a passion for members and volunteers while serving on the board, this position may be for you.

Please visit the [website Membership Portfolio page](#) for a more detailed job description and / or contact Rachel Paulson, Portland Chapter President at president@pmi-portland.org.



Project Management Institute Portland Chapter



The President's Corner

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- ◆ Roundtables

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- ◆ Change Management - Myths, Mistakes & Methods

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- ◆ Thank You, Volunteers
- ◆ Faces of PMI Portland

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- ◆ Keep Your Network Activated
- ◆ Effective Stakeholder Relationships
- ◆ What's a Project Manager got to do with Customer Relationship Management?

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Rachel Paulson

Which comes first? The organization or the customer?

Recently, because of an accident involving our puppy named Leo, my family had an opportunity to experience the "customer service" of an emergency veterinarian clinic. This clinic, at the moment we brought our injured puppy in, did not "need" us – we needed them. Yet, each and every staff member of that clinic (and there were many over the course of the time Leo was there) treated each and every member of my family as if we were the reason that they existed. Not only did they know our puppy's name and related him to us when they saw us, but they knew our names including the kids. Additionally, they provided

Increasing
value through
connection

expert care for Leo and recognized that each of us had individual communication styles and catered to those when explaining the details of Leo's situation. They exemplify the meaning of customer service.

When was the last time you went into a store, hospital (vet), restaurant or even your own workplace and felt like those around you appreciated that you were there? That they understood that without you, their business would have little value?

This is the theme for our chapter this month – **Customer Relationship Management.**

As a customer, we never want to be in a situation where we feel that we are not important or are just a number and not even recognized by our name. However, with the development and use of automated voice systems, online only options with pre-scripted Jane's and John's to "chat" with, etc., it is easy to become a number or a login name and known not by who we are and what we need.

This is the interactive age where success for most organizations will depend upon their ability to learn how to treat each customer as an individual. The PMI Portland Chapter is not the exception to this which is why so much importance is placed this year in understanding what our members need and want through direct connection and surveys to gauge the value of our delivery. It is our desire that we make each member feel important this year and want to hear from you if you don't – would love to hear from you if you do as well!

To all volunteers of the Portland Chapter, thank you for your time and focus to increase member value through connection. It has been such a pleasure to serve with you.

To our members, new and renewed, thank you for your continued involvement and feedback as a member. You are the reason this chapter exists!

Have a wonderful Holiday Season that includes a very Merry Christmas and a Blessed and Happy New Year!

Rachel Paulson, PMP, President PMI Portland Chapter

president@pmi-portland.org

Thought for the Month



"A customer is the most important visitor on our premises, he is not dependent on us. We are dependent on him. He is not an interruption in our work. He is the purpose of it. He is not an outsider in our business. He is part of it. We are not doing him a favor by serving him. He is doing us a favor by giving us an opportunity to do so."
- Mahatma Gandhi

Don't Miss the Scope Creeps!



PMI Portland's member only band will perform during the networking hour at the December 15 chapter meeting. They will play both covers and Christmas music. Don't miss these talented chapter members in their debut performance!

Upcoming Chapter Meetings

January 19 - E-commerce

February 16 - Extreme Project Management



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Chapter Meeting Sponsor

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

Want control over the "last mile" of your network? Ask **tw telecom** how we can make that happen.

tw telecom is a leading fiber, facilities-based integrated communications carrier offering local businesses "last mile" broadband connections for data, high speed Internet access and voice. Our SONET-based networks include 100% fiber optic, fully redundant, self-healing digital rings with diverse routing as standard on our metro services. Experience the highest quality voice, data and video communications transmission possible. Our two innovative National Operations Centers monitor all our national and regional network for reliability and performance. 24 x7x365 Supporting your Business Continuity, Co-Location and Disaster Recovery requirements. We deliver Data & Transport Services including: Dedicated Internet Access, Native LAN, Storage Transport Services and Voice and VOIP Services including -Local Service for Business, Business Long Distance and Integrated Business Services.



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Chapter Meeting Logistics

- 4:00 Registration Table Opens
- 4:30 Educational Presentation
- 5:30 Networking
- 6:30 Dinner and Announcements
- 7:00 Keynote Presentation

Free Parking!
Get a pass at the
registration table.

Doubletree Hotel—Lloyd Center
1000 NE Multnomah
Portland, OR 97232
(503) 281-6111

PMI Portland Chapter Members - Keynote Presentation \$25, Educational presentation \$10, Both for \$35

PMI Portland Chapter Student Members - Keynote Presentation \$10

Non-Members - Keynote Presentation \$30, Educational presentation \$10, Both for \$40

Keynote Presentation only (without meal) - \$12

Pre-register for best price! Price is \$10 more at the door.

No refunds within 24 hours of the meeting.

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



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| MON | TUE | WED | THU | FRI | SAT | SUN |
|-----|--|---|---|---|-----|-----|
| 30 | 1 | 2 | 3 | 4 SOUTH Roundtable NORTH Roundtable | 5 | 6 |
| 7 | 8 Workshop: The Process & Persona of Effective Leadership | 9 | 10 | 11 NW Roundtable | 12 | 13 |
| 14 | 15 CHAPTER MEETING NE Roundtable | 16 DNTWN Roundtable SALEM Meeting | 17 WEST Roundtable EUGENE Meeting | 18 CORVALLIS Lunch | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 | Jan. 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 NW Roundtable | 9 | 10 |

For details, see the calendar on the chapter [website](#).

December Dinner Meeting Menu

Cider Basted Turkey With Fresh Sage, Garlic Whipped Potatoes And Steamed Vegetables

Or

Mediterranean Vegetable Purse - Layers of Couscous, Asiago Cheese, Herbs and Roasted Vegetables with a Roasted Tomato Sauce

A professional photographer will be on-site to document Chapter Meeting events and activities. Photos are the sole property of PMI Portland. By registering for or attending these events, attendees understand that all photos may be used for promotional purposes.



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December Keynote Presentation

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Building Customer Loyalty

When was the last time you were told that you or your organization had the most outstanding customer service in town? How about a client swearing their loyalty to your organization? When did you last hear a fellow team member say your company is the BEST company to work for? If these would be shocking statements instead of regular occurrences, maybe attending this talk would be worth your time. Watch for the stampede towards your door, after applying some very simple, yet effective customer loyalty strategies.

About the Presenter



If you envision Professional Facilitators and Mediators as quiet, guppy like people, then you have not met **Pamela Cournoyer**. She is full of energy and will not hesitate to call it like she sees it, yet Pamela addresses conflict in ways that maintain honor and respect for all. No paint-by-number, plug and play programs here, this is real life, real people with divergent thoughts, pain thresholds, attitudes and levels of receptivity; this kind of work requires true people reading skills and nuanced compassion. As a holder of five national Master Trainer-of-

Trainer certifications, Pamela dazzles on stage - her presentation style is dynamic and engaging, while her honesty strikes to your very core. Yet, she brings humor to her presentations, softening even the most edgy of moments and her warmth is genuine, her trust building capabilities - stunning. She intuitively and playfully surfaces obvious frustrations but will also have you laughing at her awkwardness and eventually at your own, with vows to move beyond and improve even the toughest 'cookies' in the room.

New Member Meeting

Held during the Chapter Networking hour.

We meet directly after the Educational Presentations at 5:35pm in one of the Education rooms - listen for the announcements at the beginning and end of each session for the room. Join us to learn about who we are and what we offer, and to meet other new members.

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info@glaciargrouptraining.com

503-577-0891

Glacier Group Training is offering a **Project Planning Workshop** December 11th 2009 from 8:30am to 12:30pm. The class will provide a step by step approach to implementing the **PMBOK®** Guide's planning tools and techniques.

You will walk away with a solid start on creating a **Project Management Plan** for your project and receive a template to take away with you.

You can find more information at Glacier Group Training's website at:
www.glaciargrouptraining.com

\$150 4 PDUs

Why Pre-register?

Although you can register at the door for the Chapter dinner meeting, pre-registration is preferred. This helps us to assure there are enough tables, chairs and food for everyone. Register online now....

- You will be entered into a drawing for a free meeting.
- There is a \$10 fee for walk-in registration.
- Online registration closes at 10 am the Monday prior to the meeting.

Questions? Contact [Director of Registration](#).



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Project Inception

Avoiding project failure entails more than applying processes to a project. This presentation focuses on a number of techniques, learned while recovering red projects, to improve the chances of their success. It introduces the concept of Guidance Teams that get involved with the project at the customer's inception and follows the project and team through to project completion.

The presentation covers

- The concept and responsibilities of a Guidance Team
- Involvement at the customer's inception of the project
- Setting customer expectations early
- Ensuring the right team is involved to meet expectations
- Methods to ensure a smooth transition as changes occur
- Areas that cause projects problems

It focuses on the customer relationship. This method is very effective in controlling expectations and ensuring the project stay on course.

At the end of the presentation, the attendee will understand benefits of early involvement with the customer as well as processes to implement to avert project failure.

About the Presenter

Todd Williams has thirty years' experience as a Project Manager, architect, entrepreneur and businessperson. He has spent twenty of those years recovering red projects. From this experience, he has developed a process to make recoveries more efficient and prevent their reoccurrence. His experience provides a wealth of knowledge on avoiding project failure.

He has worked in manufacturing and service industries on products used internally and externally to the companies developing them. These projects include large-scale system integration of manufacturing systems, equipment integration, web-based collaboration tools, thick clients with automated update via the internet and large-scale business systems integration. The projects have been in Taiwan, Singapore, Canada, Israel and the United States with teams dispersed in as many as five countries, three continents and countless time zones. Some of these projects were captive in-house time-and-materials projects while others were outsourced fixed-priced projects.

Mr. Williams is the President of eCameron, Inc., located in the Portland, Oregon metropolitan area, and specializes in recovering red projects. He is a published author and regularly publishes a Project Management Technique eZine.

Improving Project Communication:

Tips and Techniques That Really Deliver Your News and Get Action

Whether you're writing a project deliverable or the weekly status report, leading a meeting across three time zones or presenting to top level stakeholders, project communications are supposed to accomplish one important thing: Make progress!

How do you do that? By saying it well, with clarity, being memorable and developing messages that deliver just what your project needs to get action, resolve issues, solve problems. That's what effective project communications do.

We'll discuss optimizing various forms of communications most critical to projects — improving standard templates, punching up "ho-hum" status reports, letting the team know current status and updating over-busy executives who have little time to spare.

This education session is for anyone working on projects who creates, revises, improves or delivers project communications. It's a refresher for seasoned project participants and an introduction for those who are just beginning to discover the challenges of project communications.

About the Presenter

After 25 years in technology management, **Susan de la Vergne** left the corporate ranks to help develop leaders in engineering and high tech. She's a speaker, a freelance instructor, and the only member of the Engineering faculty at Portland State with a bachelor's in English! She is the author of You CAN'T Manage Time, as well as numerous articles and is a member of the National Speakers Association.

Looking for chapter meeting presentations?

Go to our website and select **Member Resources > Meeting Handouts** from the menu bar.



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Portland Area Roundtables

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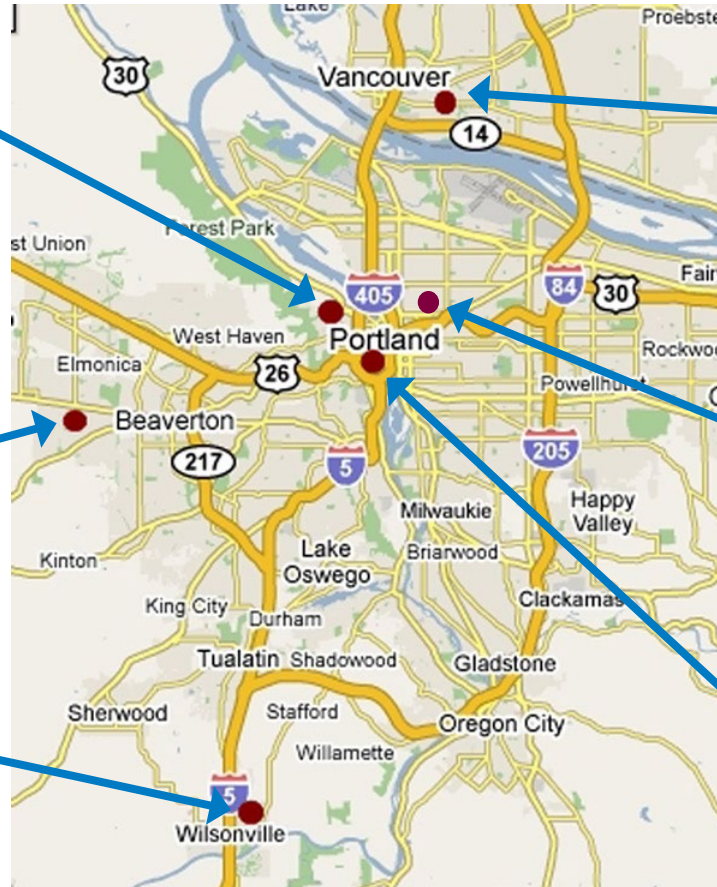
NW Roundtable
Con-Way
 2055 NW Savier, Portland
 Ask at desk for room

 2nd Friday 7:15-8:45 am

WEST Roundtable
Nike World Headquarters,
 Beaverton
 Nolan Ryan Bldg,
 Air Huarache, 1st Floor

 3rd Thursday 7:30-9 am

SOUTH Roundtable
Mentor Graphics
 8005 SW Boeckman Rd.,
 Wilsonville
 Commons, Big Muddy Conf. Rm.
 1st Friday 7:15-8:45 am
January meeting is cancelled



North Roundtable
Clark Public Utilities
 1200 Fort Vancouver Way,
 Vancouver - Community Room

 4th Friday 7:15-8:45 am
December meeting is 12/04/2009

NE Roundtable
The Portland State Office Bldg.
 800 NE Oregon Street, Portland
 Room 1C-30

 3rd Tuesday 7:30-8:30 am

DOWNTOWN Roundtable
Unitus Plaza
 1300 SW Sixth Ave., Portland
 Community Room, 4th floor
 4th Wednesday 7:30 am
December meeting is 12/16/2009



Join us!
 For more information, maps, to join the roundtable, contact the moderator, or RSVP for meetings ... see the PMI Portland roundtable webpage.

Write an Article & Earn PDUs!
 Write an article or book review for the newsletter.
[Click here](#) for details.
 Contact newsletter@pmi-portland.org



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PMI Portland Workshops

The Process & Persona of Effective Leadership

December 8, 2009

7:30 - 4:30

It's been said that...

"You Lead people and Manage processes."

"You Lead from the front and Manage from the back."

"Leadership tends to be more emotional and management tends to be more intellectual."

You will begin to have a greater sense of clarity as to your natural or default leadership style and be introduced to an effective process to improve your ability to communicate in a more clear, candid and dynamic way in order to improve the buy in of productive team members and identify those people and issues that are keeping you from running an effective process and achieving the desired results!

Instructor **Steve Hegele**, is a speaker consultant and coach with the Hegele Academy.

Logistics:

World Trade Center, Flag room, 121 SW Salmon, Portland, OR

PMI Portland Chapter Members \$225

Non-members \$240

7 PDUs

Registration closes 12/5/2009 at 5 p.m.

[Details and Registration](#)

Change Management - Myths, Mistakes & Methods

January 12, 2010

7:30 - 4:30

A rational approach for implementing Change within your organization based on an approach devoid of the myths and hype which serve to make a relatively simple task almost impossible. This seminar will present a reality based model of the Change process which explains not only why we resist being changed, but also how to convert our natural response to change into support and enthusiasm for the change. This is an in-depth and provocative approach to introduce both staff and management to organizational change - encouraging the formation of teams, respecting intelligent criticism, inviting participation and breaking down the traditional obstacles of the "we" vs. "them" in organizational cultures.

Peter de Jager is a keynote speaker/writer/consultant on the issues relating to the issue of managing change of all shapes and sizes in all types of organizations. www.technobility.com

Logistics:

World Trade Center, Plaza Conference room, 121 SW Salmon, Portland, OR

PMI Portland Chapter Members \$225

Non-members \$245

8 PDUs

Registration closes 01/10/2010 at 5 p.m.

[Details and Registration](#)



Upcoming Workshops

February 16, 2010 - Sixth Sense Communications

March 18, 2010 - Project Teams Unstuck!

April 13, 2010 - Innovation Critical



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Membership News

Welcome New Members

Ahmad, Gulshana
 Andrews, Don
 Bach, Erick
 Buitron, Daniel
 Cameron, Paul
 Coombes, Kelly
 Foberg, Erik
 Frazier, Eugene
 Gifford, Donna
 Greger, Ronda
 Hamilton, Sarah
 Holcombe, Jerry
 Keith, James
 Lawrence, James
 Loya, Christi
 MacCorkle, Staci
 Madhunapantula, Sekhar
 Martin, Dyon
 McCoy, Douglas
 Miner, Stephen
 Moyer, Marielle
 Neal, Patrick
 Newman, Lee
 Nygren, Rita

Peckham, Michael
 Redford, Julie
 Reilly, Mike
 Russell, Terry
 Schnitter, Timothy
 Schwartz, Brad
 Shannahan, Michael
 Shyduik, Donna-Mae
 Simpson, Tom
 Strehlow, Michael
 Vizina, Aaron
 Ward, Suzanne
 Wind, Michael
 Zellmer, Lee
 Zweifel, Andrea

Congrats New PMPs

Barczak, Terri PMP
 Chang, Chiahao PMP
 Collett, Cynthia PMP
 Fisher, Karla PMP
 Gillard, Shellie PMP
 Sherman, Sean PMP
 Stein, Paul PMP
 Wilder, Jeffrey PMP

Thank You PMI Portland Chapter Volunteers

All PMI Portland Chapter Volunteers are being recognized during the month of December. We currently have approximately 50 volunteers throughout the organization that generously offer both their time and knowledge on a regular basis. We will take a few moments to collectively thank the volunteers in person during the upcoming dinner meeting on December 15th. The volunteers will also be presented with a small token of appreciation during this time. The thank you gift will include a special pin that can be worn to proudly display their status as a dedicated PMI Portland Chapter Volunteer.

Our volunteers range from those elected to yearlong positions on the board of directors, to those who sign-up to volunteer for special events held by the chapter. Whatever their role, each volunteer contributes to the organization and makes it better for all our members. Please take a moment to personally thank a volunteer member when you see one at the monthly dinner meetings, round table discussions, educational programs, or other PMI events. Their efforts keep the organization strong and help to ensure we have the capacity to meet the ever-changing needs of you, our members.

Our Volunteer of the Month program usually highlights just one outstanding volunteer each month who has provided a significant and lasting contribution to the organization. If you have a volunteer in mind that meets these criteria, be sure to let us know by sending an e-mail to volunteer@pmi-portland.org. We can make sure your nominee is considered to receive special recognition as a monthly winner. Each Volunteer of the Month winner will get a write-up in the newsletter and will be featured on the chapter website for a month. They will also receive recognition at a monthly Chapter Dinner meeting where they will be awarded a certificate of appreciation, a \$50 gift certificate, and a limited edition PMI Portland Chapter Volunteer of the Month coffee mug.

For more information on volunteering opportunities, please check out our website at www.pmi-portland.org. Go the Volunteering page to view open positions, or just select the "VOLUNTEER NOW" link on the page to let us know how you would like to get involved.

Jeremy Black, Volunteer Recognition Program Manager

* 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 to change or manage your membership information.



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Faces of PMI Portland

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Connie Plowman, speaker



Anthony Tomich PMP



DeVry Univ, Keller Grad School of Management - sponsor



Saby Wairich - Volunteer of the Month

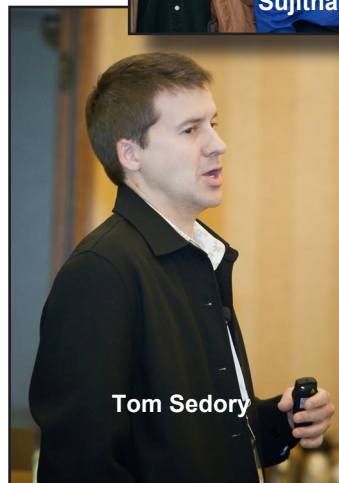


Jerry Young, Jeff Brumme, Sujitha Seevaratnam

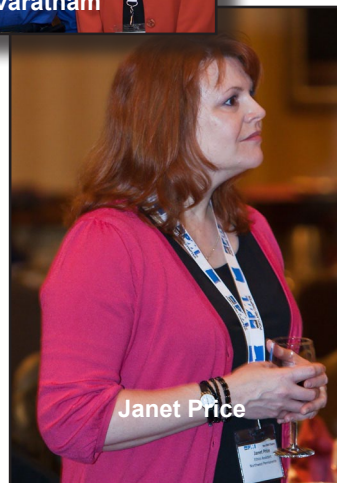
Many thanks to Erik Odegard for the photos.



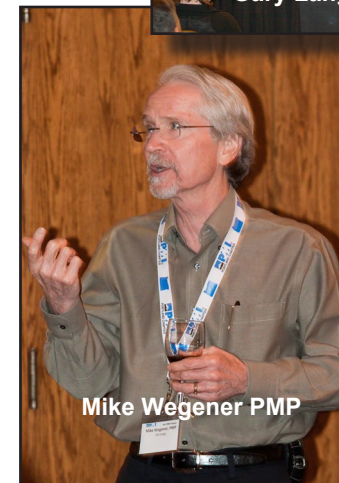
Gary Langenwaller, speaker



Tom Sedory



Janet Price



Mike Wegener PMP



Darin Goble PMP



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Keep Your Network Activated! Effective Stakeholder Relationships



Have you shared your passion much lately? With a well maintained network, volunteering for a leadership role at a non-profit is going to be much easier. Maintaining your network should be on your daily habit list. We all respect our cloud of friends and acquaintances; remind them so that they are there for you when you ask. Here are a few things you can do: send holiday cards, make the sincere 5 minute phone call, send a fax (I've found this to be more personal than email), ask for an informational interview, invite to dinner or happy hour, etc. Get creative. You'll get more than you give.

Many companies use Customer Relationship Management software. It is a personal twist on what is typically thought of as something a business does. Your friends and acquaintances can be looked at as customers. After all, are they not the benefactor of knowing you? Make your friendship worthwhile by sharing your passion.

Last week I attended a non-profit board member training session put on by the Willamette Valley Development Officers in partnership with the Young Professionals of Portland. In summary, volunteering to be on a board can be very rewarding and offer a lot of leadership experience. And it requires a lot of fund raising. For your passion, you are expected to open your Rolodex and introduce your network to what you are passionate about. How much easier is this with a well connected network?

Keep in touch with people you know. It is good practice to develop your leadership and listening skills, and when the time is right, you have them to see if they share your passion.

Matthew Horvat is a coach for Lean Project Consulting, Inc. He lives in Portland and consults to the AEC industry.



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Projects are done for a reason

Any project that is cancelled, not completed, or fails to meet its objectives and has to be written off, is obviously a waste of organization resources and time. However, it is also not enough to just successfully execute a project to completion. A successful project that is not implemented or used because it doesn't meet the customer's or user's requirements and expectations is equally, if not more, wasteful.

The success of a project, therefore, depends on meeting both the business objectives for which it is being done and its customer/user expectations. This article focuses on the people involved in projects because they are the ones who define business objectives, specify requirements, approve projects, do the work of projects, and use the product of the project. In the world of project management, we collectively call these people "stakeholders." It is important to understand their expectations to identify and meet their needs.

Who is a stakeholder?

Webster's Dictionary's definition of stakeholder is very appropriate for projects: "the holder of the stakes for a wager." Replace the word "wager" with "project" and a stakeholder becomes anyone who has a stake in the project's outcome.

The Project Management Institute's (PMI®) Guide to the Project Management Body of Knowledge (PMBOK Guide®) expands this definition to include anyone who, "... is actively involved in the project, or whose interests may be positively or negatively affected by execution or completion of the project." This means that just as the project affects its stakeholders, in a reciprocal way, stakeholders can and do affect the project. But first, we need to determine who the stakeholders for today's projects are.

Stakeholder Identification

A logical first step to identifying project stakeholders is to look at possible stakeholder groups. In general, these can be sorted into three levels:

- ◆ **Level 1 - Stakeholders within the project organization: Senior Management, Sponsor, Customer, Users**

The level 1 stakeholders define the need and requirements for the project, and control the traditional project constraints of cost, time, and scope (the "triple constraints"). This includes the organization senior management, the sponsor, and possibly others who, by their position, may influence the project. Senior managers approve and contribute resources to the project, and/or may be users of the outcome of the project. It is in



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Effective Stakeholder Relationships *(continued)*

effect senior management's project, and they define the product to be produced.

◆ Level 2 - Stakeholders within the project: Project Manager, Core Team Members, Vendors and Suppliers, Support Staff

At the second level are the project manager and team, and any others operating within the project's triple constraints. These are the people who do the actual work of the project and, therefore, are critically important to project completion, and ultimately responsible for project success.

◆ Level 3 - Stakeholders from outside organizations: Regulators, Licensing Agencies, etc.

The third level of stakeholders includes those not directly a part of the project's organization and not involved in the project work. They are, however, relevant to project success because of their potential impact on the project. This includes those whose support and/or approval is needed to ensure project completion, and include regulatory, licensing, and other agencies who can influence the project. Developing good working relationships to understand both their requirements and expectations is crucial, and requires extra effort to maintain effective relationships because of the distance between them and the project.

Stakeholder Analysis

Having identified the various stakeholders, we now need to take into account their importance and ability to influence the project. Their expectations must be first recognized and then understood. Stakeholder analysis identifies and documents their needs and leads to an understanding of what the stakeholders believe the project will produce. The analysis provides understanding of their needs and criteria to satisfy them, and it allows creating working relationships to balance and meet their expectations.

◆ **Level 1 Stakeholder Analysis:** Senior management determines which projects are in the organization's portfolio and their priority, and authorizes spending organization resources with an expectation of some return on that investment. Senior management and the project sponsor need to provide clear guidelines of their expectations to the project manager, who must then make sure that the project team understands these organizational expectations. The customer (who may or may not be the end-user) owns the requirements for the product of the project, and their functional requirements must be clearly understood and prioritized. Users of the project outcome are obviously important stakeholders and require careful analysis to identify their expectations.

◆ **Level 2 Stakeholder Analysis:** The project team and others working within the triple constraints also have expectations. A clear understanding of the project goals and objectives by the team is

essential. If they are unclear about the needs and intended use of the product of the project, decisions made during project development can take the project in a wrong direction requiring significant replanning and rework that can, and often does, expand the triple constraints. The project team's understanding of what is expected of them and what they expect the project to produce is essential to project success.

◆ **Level 3 Stakeholder Analysis:** The stakeholders outside the organization and project also need to understand the project as well as its impact, and their expectations need to be clearly documented. Regulatory and licensing agencies may be open to adjusting or modifying their stated requirements as long as the overall goals of their organizations are met. Waivers may also be available for certain circumstances and are often overlooked as a way to mitigate otherwise paralyzing restrictions.

Balancing Stakeholder Needs

Stakeholder's differing goals and objectives may be in significant conflict on a project and require careful balancing to ensure the overall project goals can be met. The step after stakeholder analysis, therefore, is to balance stakeholders' needs that demand the most attention and map these against the project constraints. This requires ranking the needs in terms of relevance and influence to the project to clearly separate the must-have, like-to-have, and would-be-nice-to-have requirements.

Summary

Projects are done by, for, and with people. Project stakeholders are these people. They include anyone, and everyone, who can influence, impact, or are impacted by the project. This creates complexity because of the wide range of people involved including the managers and the sponsor in the organization that owns the project, customers, users, the project team, and others internal and external to the project. Stakeholder identification, analysis of their needs, and balancing of these needs in the best interests of the project are significant challenges but crucially important for project success.

About the Author

Dr. Jerry Mulenburg, PMP, is a Global Knowledge instructor with a long and varied career in project management for NASA, in higher education, and for the US Air Force. He has published a number of technical papers and made many conference presentations on issues related to managing complex projects.

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What's a Project Manager got to do with Customer Relationship Management?

According to Wikipedia, "customer relationship management (CRM) are methods that companies use to interact with customers". In that case what does it have to do with a project manager? Project managers have connectivity with CRM in at least three ways. The first two are the more obvious: they manage the development of CRM software packages or they manage the implementation and roll-out of a CRM system deployment. The third is less obvious and it is associated with any project manager working on any project. Let's look at each in turn.

The first of the two most obvious connections is the project manager responsible for developing enterprise CRM solution packages. He or she has the classic role of managing a software development from product concept through to completion of design whether it be for an enterprise solution such as CDC Software's products or cloud-computing solutions from Salesforce. Once the project manager is finished with the design, it's time to hand over to the deployment phase.

There are two parts to the deployment phase: firstly setting up the solution on the corporate IT system and secondly rolling out the system to users. Let's focus on the second part. For a global B2B company, this can be a major project that spans multiple years. I'll use the example of a CRM system that is used to keep track of customer contact events, opportunities, quotations, support requests to other functional groups and which can generate sales funnel size and segmentation information. The project manager and team will be working with the various user groups: executives, marketing, sales, finance etc. The team will be setting up pilot groups in each organization and then getting feedback for improvement of types of data entry needed and type or format of reports that are required. Once the pilot phase is over, then the project manager will turn attention to the full scale roll-out with associated education and training. Education includes ensuring that everyone understands the benefits and responsibilities that come with access to the system. When used correctly a CRM system allows the sales account manager to call-on the support of the deeper company team to win business; when used incorrectly, it means that there can be undisciplined contacting of customers. Training focuses more on the use of the actual CRM tool.

However, what about the third way that project management is linked to CRM? In the wider sense CRM is not just about enterprise efficiency-enhancing software tools – it is about relationship management with customers no matter how that is done. In the context of a product development program or project there is a link to customers throughout its progress. Voice of the customer (VoC) is, or should be, the foundation of the definition of the product. Customer feedback is, or should be,

sought during the development to validate the product concept and design. Lastly customers are the ultimate users of the product that is the output of the product development program.

Obtaining VoC, is usually the responsibility of a product marketing professional assigned as member of the development program core team. However, since capturing it is part of the program and will use other functional resources, the project manager should have oversight of it from a program schedule perspective and will most probably also join some of the customer visits. Similarly the project manager will also have to manage concept and product validation activities.

It is not unusual that some commitments will be made to selected key customers during the validation phases, there may even be some customer expectations set prior to the project commencing; this is always the case if it is a custom project. The project manager will need to make sure these commitments are documented in the project plan and visible to the team to ensure these expectations are met or managed appropriately to protect the customer relationship.

Going beyond product development, in the wider sense, there is always CRM even when the project is one of developing and internal process. Customers would be those getting "output" from the process and also those other stakeholders such as senior management.

So in summary, in the very specific sense of CRM software tool development and roll-out there are clearly defined roles for project managers. However in the wider sense of managing relationships with customers, every project manager developing products, services or internal processes should take CRM into account as part of project planning and management.

About the Author



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Bob has over 20 years experience as both individual contributor and manager in engineering, product management and marketing in high-tech companies. Most recently he was Product Line Marketing Manager of the Signal Source Product Line at Tektronix.



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