



## Newsletter February 2011

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### PMI

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- PMI Exam Updated
- PMI Learn Updated
- About PMI Portland

Website: [pmi-portland.org](http://pmi-portland.org)

## Chapter Meeting February 15, 2011

### Meeting Sponsor

## Slalom Consulting

### Educational Presentation

"The Sunflower of Praise,"  
with Tom Cox

### Keynote Presentation

"It's the people, stupid!"  
with Damian Smith

[Register Now](#)

Photo by Julie Metz.

# PMI Portland February Newsletter

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## President's Letter



Joseph Marietta

I am a PMP, as are nearly 60% of our members. PMP (Project Management Professional) is a widely-accepted credential in the project management profession. The certification cycle lasts three years, and each PMP must earn at least 60 PDUs (Professional Development Units) during those three years to earn the right to recertify. Generally speaking, a PDU is awarded for each hour of project management education. I've found that quality, instructor-led training offered outside of the Chapter can cost from \$60-130 per PDU. Online training is considerably less. So, if you prefer the interaction and quality of instructor-led training, you need to budget (on average) \$1900 annually to maintain your certification—unless you utilize the offerings of PMI Portland!

I often hear the question—how can I affordably earn quality Professional Development Units? Here's how to leverage your Chapter membership.

#### Opportunity One: Monthly Chapter Dinner Meetings (\$35 for 2 PDUs)

Since becoming Chapter President, I've realized how much I appreciate chatting with old friends and making new ones at Chapter dinner meetings—because I rarely have the time now. For the typical PMP, Chapter dinner meetings are a win-win-win: earn a PDU for the Education session, earn a PDU for the keynote, and network. I build my project management knowledge base, earn 2 PDUs, and build my professional network all for \$35, including dinner!

#### Opportunity Two: Mentoring (\$0 per PDU)

By offering your time as a PMI Portland mentor, you get one FREE PDU per contact hour that you have with a "mentee" (the person who is being mentored). It is even possible to deduct mileage and the cost of your coffee or lunch from your taxes as a cost of professional development. You can earn up to 5 PDUs per year while helping your fellow project manager.

Personal note: I never really thought of myself as mentor material. I guess experience and expertise kind of sneak up on you with time. However, I discovered that I had one thing that many "mentees" don't have and want me to help them get....a PMP!!! Many of the people who sign up to be mentored through PMI Portland are looking for guidance in getting their PMP. If you already have yours, you may be an expert!

Also, a typical "mentee" is a student in a project management course, a new graduate looking for their first job, or looking for advice once they have their first job. Face it—if you have your PMP (or other credential) you probably have more experience than they do. You'll be surprised how much you know, and how easy it is to help your fellow Project Manager.

#### Opportunity Three: Volunteering (\$0 per PDU)

You can also earn FREE PDUs by offering your time to your PMI Chapter as a volunteer. You can possibly deduct mileage and the cost of volunteering-related meals from your taxes as a cost of professional development. Your Chapter is managed by volunteers just like you. There's no better way to build your experience-base, your knowledge-base, and network with fellow volunteers (we call them "the cream of the crop") and Chapter members, all while earning PDUs. For example, as a member of the Board of Directors, you can earn half of the PDUs required for recertification.

[continued](#)

## Thought for the Month

**"If you don't go after what you want, you'll never have it. If you don't ask, the answer is always no. If you don't step forward, you're always in the same place."**

*—Nora Roberts*



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### Opportunity Four: Annual Professional Development Day (\$28.50 per PDU)

Each summer, PMI Portland hosts a hugely popular Professional Development day featuring several tracks and numerous speakers. You'll have a difficult time choosing which compelling topics to attend. You'll earn 7 PDUs while building your knowledgebase and networking with Project Managers and industry professionals.

At \$199 (last year's member price) for the full day event, that's \$28.50 per PDU—and lunch is included!

### Opportunity Five: Chapter Workshops (\$32 per PDU)

Nearly every month, PMI Portland hosts an instructor-led project management-related workshop. Most are one full day, and cover subjects like ScrumMaster Certification (CSM) Training; Program Management; Requirements: Definition, Acceptance and Traceability; and Change Leadership—just to name a few. Typically, you'll earn 7 PDUs for a full-day workshop. So, at a typical cost of \$225 (Chapter member price) that's \$32 a PDU—and lunch is included!

## PDU Category Structure Changes on March 1, 2011

Read the article on [page 27](#) for more information. Go to [PMI.org](http://PMI.org) for complete details.

Also see reporting instructions on the [website](#), or contact Denise Tischler at [Certification@pmi-portland.org](mailto:Certification@pmi-portland.org).

### Opportunity Six: Roundtables (\$0 per PDU)

Each month, PMI Portland hosts 8 FREE Roundtable sessions at local businesses where you can discuss and brainstorm topics and issues that you and your colleagues want to address. You'll meet project managers, analysts, engineers, hiring managers, employed and those seeking employment—all there to solve problems, build their knowledge, skills, and professional networks dynamically—and earn a PDU. In many locations, breakfast is included!

### Opportunity Seven: Online Courses (\$15-\$37 per PDU)

One of those little known benefits to being a Chapter member is that you have access to our online 24/7 continuing education classes. The PMI Portland Chapter has partnered with Vantage Point Consulting and Corporate Education Solutions to provide an online SkillSoft(R) library of project management, leadership, and business skill courses available on your time and at your location! Several hundred SkillSoft(R) courses are accredited for PDUs. Hundreds of courses are available for \$74 each, with volume discounts applying within the same month. Courses average 2-5 PDUs each. So, that's \$15-\$37 per PDU! Go to [http://www.cesolutions.net/landingpage/pmi\\_portland/](http://www.cesolutions.net/landingpage/pmi_portland/).

### Opportunity Eight: Write an Article (\$0 per PDU)

You can earn up to 3 PDUs for writing an article for this newsletter. See the [newsletter webpage](#) for details.

Detailed information about all these opportunities can be found on our [website](#) and within this newsletter.

I'm sure I'm missing some Chapter offering, but, I think you get the idea. With typical trained and certified project managers earning an average of \$12,000 more per year than their non-certified counterparts (*PMI 2009 Project Management Salary Survey*), you'll want to earn your certification soon. Once you're certified, you can take comfort in knowing that your Chapter is doing everything possible to keep the cost of maintaining your certification low.

**Joseph Marietta**

Chapter President

[President@pmi-portland.org](mailto:President@pmi-portland.org)



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## Upcoming Events

- 02/09 Requirements Workshop
- 02/10 SolarWorld Roundtable Special Event
- 02/11 NW Roundtable
- 02/15 Chapter Dinner meeting
- 02/16 Salem Lunch Meeting
- 02/17 West Roundtable
- 02/17 Stop Playing Games Workshop earlybird deadline
- 02/17 Eugene Dinner Meeting
- 02/18 Corvallis Lunch Meeting
- 02/22 NE Roundtable
- 02/22 ScrumMaster Certification Training
- 02/23 Downtown Roundtable
- 02/25 North Roundtable
- 03/02 Port of Portland Roundtable
- 03/03 OODN Workshop
- 03/04 South Roundtable
- 03/07 Stop Playing Games Workshop registration deadline
- 03/10 SolarWorld Roundtable
- 03/11 NW Roundtable
- 03/11 Stop Playing Games Workshop
- 03/15 Chapter Dinner Meeting

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

## Roundtable Meetings

Join other project managers to discuss issues that they are currently facing. Held in various locations across the Portland-Vancouver area, each has a personality of its own.

Meetings start with introductions followed by a solicitation for topics. The topics are selected based on the rules of the specific Roundtable. Roundtable meetings are worth 1 PDU, are valuable and are always fun. There is a balance of junior and senior project managers from a variety of disciplines to provide an eclectic view of a subject.

Anyone can sign up to join one or more Roundtables and receive roundtable notices and minutes. Contact the Director of Roundtables at [roundtable@pmi-portland.org](mailto:roundtable@pmi-portland.org). For details, maps, and moderators, see the [Chapter website](#).

### 1st Wednesday

4:30–6:00 p.m.

### Port of Portland Roundtable

Port of Portland

### 1st Friday

7:15–8:45 a.m.

### South Roundtable

Mentor Graphics campus, Wilsonville

### 2nd Thursday

5:30–7:00 p.m.

### SolarWorld Roundtable

SolarWorld USA, Hillsboro

### 2nd Friday

7:15–8:45 a.m.

### NW Roundtable

Con-way, Portland

### 3rd Thursday

7:30–9:00 a.m.

### West Roundtable

Nike World Headquarters, Beaverton

### 4th Tuesday

7:30–8:30 a.m.

### NE Roundtable

Portland State Office Building

### 4th Wednesday

7:30–8:45 a.m.

### Downtown Roundtable

Unitus Plaza, Portland

### 4th Friday

7:15–8:45 am

### North Roundtable

Clark Public Utilities, Vancouver



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## Chapter Meeting Logistics

- 4:00 Registration table opens
- 4:30 Educational presentation
- 5:30 Networking
- 5:35 New member orientation
- 6:30 Dinner and announcements
- 7:00 Keynote presentation

### Meeting Pricing

#### PMI Portland Chapter Members\*

- Keynote presentation and dinner \$25
- Educational presentation \$10

#### PMI Portland Chapter Student Members\*

- Entire meeting \$10

#### Non-Members

- Keynote presentation and dinner \$30
- Educational presentation \$10

#### Keynote Presentation only, without meal \$12

Members and Student Members must provide PMI number at the door to receive member pricing.

No refunds within 24 hours of the meeting.

### New Member Welcome Meeting

We meet directly after the Educational Presentation, in the same room. Join us to learn about who we are and what we offer, and to meet other new members.

- Chapter Members and Chapter Student Members are current members of PMI and the Portland Chapter. Student Membership is defined by PMI GOC, and does not apply to non-members who may be students.

[PMI Portland Chapter Student Outreach Process](#)

## Upcoming Meeting Dates

February 15

March 15

April 19

[Register Now](#) For the February Chapter meeting

Online registration opens the day after the previous Chapter dinner meeting.

## Register early online and save

**Price is \$10 more after 10 a.m. Monday, and at the door.**

### February Dinner Menu

Oven Roasted Salmon With Baby Potatoes and Peach Blackberry Chutney, Fresh Vegetables, Carrot Spice Cake

Or

Wild Mushroom Ravioli Over Grilled Vegetables and Roasted Tomatoes with a Smoky Rogue River Bleu Cheese Cream Sauce, Carrot Spice Cake

### Doubletree Hotel–Lloyd Center

1000 NE Multnomah, Portland, OR 97232 (503) 281-6111

### Free Parking





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## February 15 Chapter Meeting Sponsor

### Slalom Consulting

Slalom Consulting is a business and technology consulting firm that helps clients win by building local teams with a deep understanding of the art and science of winning. Slalom drives client ROI in areas such as cloud computing, business intelligence, portals, mobility, project management and process

design. Slalom's consultants are handpicked experts who stay ahead of the curve by always finding the next innovative advantage. Headquartered in Seattle, Slalom employs more than 1000 consultants across ten cities in the United States. For more information visit [www.slalom.com](http://www.slalom.com).

**The Art and Science of WINNING**

**You can win a race in the first turn.  
If you choose the right course.**

Slalom is a leading business and technology consulting firm who applies the art of business and the science of technology to help our clients win.

To learn more visit [slalom.com](http://slalom.com)

or contact your local Portland Slalom team at [portland@slalom.com](mailto:portland@slalom.com) or 503.552.9200

**Business Management**

- Project Management
- Business Analysis
- Program Management
- Portfolio Management
- Business Strategy

**Technology Enablement**

- Technology Innovation
- Business Productivity
- Architecture + Infrastructure
- System Design + Implementation
- IT Strategy

**Organization Effectiveness**

- Change Leadership
- Learning + Development
- Process Design + Optimization
- Business Performance Management
- Organization Design

**Information Management**

- Business Intelligence
- Portals + Collaboration
- Content + Knowledge Management
- Data Management
- Customer Insight

**SLALOM CONSULTING**



# February 15 Chapter Meeting–Educational Presentation

## The Sunflower of Praise

You'll get more done as a PM when you provide the Five Preconditions of High Performance. As you will discover, Effective Praise provides two of those five preconditions.

During this talk, updated with recently published Harvard Business Review research, you will learn how you can provide effective praise.

Effective praise is harder to give than most leaders may realize. The wrong praise at the wrong time can actually undermine performance and morale. This workshop will cover the three opportunities for feedback that every manager faces daily, the three responses that work best, and methods for telling which response to give when.

You will take away Guidelines for knowing which responses to give, and new Behaviors for providing optimal praise and feedback to colleagues and subordinates

### About the Presenter



Tom Cox is a successful consultant, author and speaker who coaches CEOs and Project Managers on how to get better results through more effective leadership. A graduate of the University of Chicago, Tom earned his four-year degree in psychology in just three years, with honors. He was a 2002 candidate for Governor of Oregon.

Tom's internet radio program titled "Tom on Leadership" (on the Linked 2 Leadership Radio Network) is a Top Five hit on Google.

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## Professional Development Center

### Education at the Speed of Business



#### Courses and Programs in:

- Conflict Resolution
- Project Management
- Human Resource Management
- Information Technology
- Multimedia Professional
- Six Sigma

[www.pdc.pdx.edu](http://www.pdc.pdx.edu)



Professional Development Center  
PORTLAND STATE UNIVERSITY



# February 15 Chapter Meeting–Keynote Presentation

## It's the People, Stupid!

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Projects fail all the time. In fact according to Harvard Business Review, London School of Business, Gartner, The Economist and a host of other organizations that have studied this, over 70% of major initiatives fail to meet their stated objectives.

The most often given reason for these failures is resistance to change. In other words, the most critical success factor of any project isn't actually delivering the solution, it's managing the people. Or, to paraphrase a president, "It's the people, stupid."

What's interesting from a PM's perspective though, is that the people that need to be managed are not just the ones under the direct control and authority of the PM. It's the many other impacted stakeholders, users, executives, customers and partners whose support and buy-in will make the difference between success and failure.

Normally the PM does not have any authority over these people. In fact, they are often subordinate to many of them. So, how does a PM effectively manage this critical success factor? Or should it even be the PM's job to do that? Isn't the project sponsor responsible for that? Well, the answer to that question depends on whether that PM wants to build a reputation as a PM of successful projects, or well executed failures.

To be successful, PMs need to not only be great project managers, they also need to be great people leaders, great change managers, and inspirational champions for their projects. In this presentation, Damian Smith, GM of Slalom Consulting's Portland office, will provide some tools, techniques, tips and tricks, ranging from formal change management best practices to some simple rules and guidelines, that PM's can use to better manage all of the people who are critical to the success of a project.

#### About the Presenter



Damian Smith is a business leader and visionary who inspires his teams and clients to set, and achieve, aggressive goals and breakthrough solutions. Damian joined Slalom Consulting as the General Manager for the Portland office in January 2010. Since then, the Portland office has doubled in size and now includes most of the large organizations in Portland among its clients.

In addition to leading one of Portland's best consulting companies, Damian is also a regular guest speaker at seminars, conferences and universities (including two previous presentations at PMI Portland), and a frequent contributor to local and national media. Damian was also recognized for his leadership of the Oregon Business Magazine #1 Large Company to Work For in Oregon in 2009.

Before joining Slalom, Damian spent 15 years leading consulting practices with Hitachi Consulting and Tactica in the US, and Stream International in the UK. Prior to moving into consulting, he launched several new software products and companies in the European market as Vice President of Marketing with the software vendor incubator European Software Publishing.

Damian is also the proud dad of his obviously gifted 3 year old daughter Avery, and a not as attentive as he should be husband to his beautiful, smart and very understanding wife Megan. Although you would never guess it from his ample physique, in his spare time Damian enjoys running, and will be competing in Hood To Coast this year with Team Chuck Norris... because when Chuck Norris runs Hood To Coast, he runs east, not west.





# How Can Chapter Leadership Propel your Career?

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There is no better way to highlight your leadership skills than to serve on the Board of Directors for PMI Portland! Nominations for all Board positions will be accepted in March!

Take the next step in your career. Gain invaluable experience serving on the Board for this dynamic nonprofit organization. Strategically lead your portfolio to better serve our over 1400 members. Form the relationships that will propel you to the next levels of your career.

How does being a PMI Portland Board member prepare you to advance?

- Gain invaluable strategic leadership experience
- Develop and showcase your organization, motivation and leadership skills
- Develop and nurture your network of personal relationships for career development and professional growth
- Highlight your ability to effectively contribute to the mission and strategy of a dynamic non-profit organization
- Develop and implement your vision for your portfolio, while influencing the direction of the Chapter
- Highlight your high-level team-building and collaboration expertise
- Expand your leadership horizons and skills at PMI's premier Leadership Institute Meeting or PMI Region 1 Leadership Conference
- Qualify for PMI's premier Leadership Institute Master Class
- Improve your knowledge and application of organizational and portfolio financial management
- Hone your presentation and public speaking talents

Interested? Look over the following descriptions and contact the current Board member to chat about your future.

### Chapter President

The President steers the ship. The President Elect position is elected by the Chapter, serves one year shadowing the current President, and then serves as President for one year. The President then moves to the Past President position to provide advice and insight to the Board of Directors.

Working with the Board of Directors and an Executive Committee (consisting of President Elect, Past President, VP at Large, VP Finance, and Chapter Secretary), the President provides Chapter leadership and coordinates all activities.

Questions? Contact:

President Joseph Marietta [President@pmi-portland.org](mailto:President@pmi-portland.org)  
President Elect Steve Thornton [PresidentElect@pmi-portland.org](mailto:PresidentElect@pmi-portland.org)  
Past President Rachel Paulson [PastPresident@pmi-portland.org](mailto:PastPresident@pmi-portland.org)

### Chapter Secretary

The Chapter secretary provides vital support on a number of fronts: Manages the Chapter document library and contact lists, arranges Board meetings, captures and manages board meeting notes, issues and action items, oversees and reviews the preparation and retention of all non-financial Chapter records and filings, maintains Chapter asset log, and acquires name tags, business cards and other requested items for Chapter leadership.

Questions? Contact:

Secretary Carol Haertlein [Secretary@pmi-portland.org](mailto:Secretary@pmi-portland.org)

### Vice President Finance

The Finance Portfolio, working with the entire Board, is responsible for Accounting, Investments, Finance Policy, and Procedure Creation. Click [here](#) for more information.

Questions? Contact:

VP Finance Shancy Saban [VP\\_Finance@pmi-portland.org](mailto:VP_Finance@pmi-portland.org)



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#### Vice President At Large

The Vice President At Large serves as the members' ombudsman advocating member concerns and focusing board attention on membership policies and benefits. This position provisionally provides contingency planning should a Board member be unable to fulfill their commitment, and takes on special projects for the board and the Chapter.

Questions? Contact:

VP at Large Terri Hagmann [VP\\_At\\_Large@pmi-portland.org](mailto:VP_At_Large@pmi-portland.org)

#### Vice President Marketing

The Marketing portfolio promotes PMI Portland Chapter and project management as a whole in the region. Click [here](#) for more information.

Questions? Contact:

VP Marketing Suzan Reed [VP\\_Marketing@pmi-portland.org](mailto:VP_Marketing@pmi-portland.org)

#### Vice President Membership

The Chapter Membership portfolio promotes the value of Chapter membership to Chapter members, as well as to increase that value where possible. Membership consists of Volunteering, Communication, and Quality sub-committees. Click [here](#) for more information.

Questions? Contact:

VP Membership Jeremy Black  
[VP\\_Membership@pmi-portland.org](mailto:VP_Membership@pmi-portland.org)

#### Vice President Operations

The operations portfolio provides the processes and technical infrastructure that support ongoing Chapter activities and strategic initiatives. Click [here](#) for more information.

Questions? Contact:

VP Operations Jim Yan [VP\\_Operations@pmi-portland.org](mailto:VP_Operations@pmi-portland.org)

#### Vice President Outreach

The Outreach portfolio offers programs in the academic, business, and community arenas. Click [here](#) for more information.

Questions? Contact:

VP Outreach Jeff Brummel [VP\\_Outreach@pmi-portland.org](mailto:VP_Outreach@pmi-portland.org)

#### Vice President Professional Development

The Professional Development portfolio offers project management related classes and workshops to PMI Portland Chapter members and the community. Click [here](#) for more information.

Questions? Contact:

VP Professional Development Diane Brady  
[VP\\_Prof\\_Devel@pmi-portland.org](mailto:VP_Prof_Devel@pmi-portland.org)

#### Vice President Programs

The Programs portfolio organizes and supports events for the PMI Portland Chapter such as the monthly dinner meetings and roundtables. Click [here](#) for more information.

Questions? Contact:

VP of Programs Terri Hagmann [VP\\_Programs@pmi-portland.org](mailto:VP_Programs@pmi-portland.org)

Watch this newsletter, your email and the Chapter website for more information.

## 2011 Education Calendar

Mark your calendars for these important educational events:

Feb. 22–23	Certified Scrum Master (CSM)	Dave Prior
Mar. 11	Stop Playing Games	Rick Morris
Apr. 2–May 7	PMP/CAPM Spring 2011 Prep Course	PMI Portland Chapter
Apr. 7	Program Management	Jeff Oltmann
May 11	Managing Virtual Teams for Real Results	Rick Brenner
Sept. 8	Killer Competency	Kimi Hirotsu Ziemski
October	Project Dynamics when Working with Passive/Aggressive Behavior	Rachel Paulson
November	Change Leadership	Steve Brook

Watch your email for details and registration information as it becomes available. Or, visit the [Education](#) webpage.



## PMI Portland Chapter Scholarship

### Scholarship Criteria

PMI Portland, Oregon is offering two individual scholarships; each in the amount of US\$1,250. One scholarship is for both undergraduate and graduate students, and the other is for undergraduate students only.

Applicants must be enrolled in or applying for an accredited two year or four year degree program. For the two year undergraduate degree program, applicants must also be enrolled in or applying for a Project Management Certificate Program. For the four year degree program, applicants must be enrolled in or applying for a degree program in project management or a related field of study benefiting from project management. In addition to the criteria noted above, applicants will be reviewed with the following order of priority:

- A resident of the Portland Metro area (including Clackamas County, Columbia County, Multnomah County, Washington County, and Yamhill County, in Oregon, or Clark County, and Skamania County, in Washington) attending or planning to attend any two or four year accredited college or university.
- An individual attending or planning to attend a two or four year accredited degree program at a college or university in the Portland Metro area as defined above.
- An individual attending or planning to attend any two or four year accredited college or university in the states of Oregon or Washington.

Please click on the following link to apply:

[http://www.pmi.org/pmief/scholarship/app\\_intro\\_page.asp](http://www.pmi.org/pmief/scholarship/app_intro_page.asp) or for more information about the scholarship, contact Balbinder K. Banga at [acad\\_outreach@pmi-portland.org](mailto:acad_outreach@pmi-portland.org).

**Application Deadline is June 1, 2011**

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## InnoTech 2011: eMarketing, NW Security Summit, Conference, Expo and more!

**April 21, 2011 8:00-5:00**

Oregon Convention Center  
777 NE Martin Luther King Jr. Blvd, Portland, OR 97232

Go to [www.innotechoregon.com](http://www.innotechoregon.com) for registration and details, or contact Sean Lowery ([seanl@prosperaevents.com](mailto:seanl@prosperaevents.com)).

### eMarketing Summit @ InnoTech

[www.emarketingsummit.com](http://www.emarketingsummit.com) for details. Use Discount Code EMS20AT for \$20 off the price which includes full day of summit, lunch, SoMe Awards and more.

### NW ISSA Security Conference @ InnoTech

Thursday, May 6, Oregon Convention Center

[www.nwsecuritysummit.com](http://www.nwsecuritysummit.com) for information and registration.

Price is only \$50 for ISSA & ISACA Members. Use Discount Code ISSA11MBR for lower price, \$65 for non-ISSA members. Fee includes full day of the summit, luncheon presentation, all InnoTech Conferences, expo & receptions.

### Free passes to InnoTech Tech Conference & Expo May 6

A limited number of complimentary passes are available. Please register at [www.innotechoregon.com](http://www.innotechoregon.com). Use PMI888 in the Discount Code field for complimentary admission. (This pass does NOT include the NW CIO Summit, NW ISSA Security Conference or eMarketing Summit, extra registration fee is required)

Just a few of the InnoTech conference tracks & special events:

- Microsoft Technology Symposium including SharePoint 2010 and Office 2010 demos
- Wireless/Mobile Applications Track including Native vs. web, mobile application panel
- Talks on Cloud Computing, Data Center, Social Computing, iPad demo, and much more
- InnoTech Happy 45-Minutes (the perfect place to mingle over complimentary beverages, appetizers, live music and exhibits)



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# Professional Development Workshops

## ScrumMaster Certification

### Two-day Training—February 22–23, 2011

Agile Project Management has become a skill set that is in high demand across many industries. The most respected and best recognized **Agile certification** is the “**ScrumMaster**” from the Scrum Alliance, Inc. The new Scrum Alliance certification assessment system requires students to **pass an online exam** before becoming Certified ScrumMasters.

By taking this certification seminar you will acquire all of the information needed to successfully pass the **certification examination!** In fact, PM8020.com gives you a **100% Money-back Guarantee** that you will pass the exam the first time!

This 2-day class is suitable for anyone using or wanting to use the art of the ScrumMaster. It is also very valuable for anyone involved in Scrum (Managers, Team Members, Product Managers, etc.). This program is for people who are familiar with basic Agile concepts but students are not required to be PMPs.

During this seminar participants experience highly interactive, hands-on training in how to apply Scrum in many project situations. And immersion in exercises, case studies, and examples provides mastery of how to be a ScrumMaster.

### Workshop Outline

You will learn time-tested practices for managing Sprint Planning Meetings, Daily Scrum Meetings, Sprint Reviews, Sprint Retrospectives and more! Content includes:

- Introduction to Agile Principles
- Introduction to Scrum Principles
- Scrum Core Elements & Practices
- Product Visioning & Product Roadmaps
- Planning Releases
- Roles & Responsibilities
- Product Backlog & Release Planning
- Sprint Backlog & Sprint Planning

- Creating Incremental, Inspectable Deliverables
- Daily Meetings
- Burndown Charts & Project Reporting
- Sprint Review & Retrospective
- Scaling Scrum & Remote Teams

After successfully completing this class, participants will receive a 2 year prepaid membership in the Scrum Alliance and are prepaid to take the Certified ScrumMaster exam.

### Workshop Details

#### 16 PDUs

#### Red Lion Hotel Portland—Convention Center

1021 NE Grand Ave., Portland, OR

#### Cost

PMI Portland members \$1295 Non-members \$1495

Registration closes February 12, 2011

### About the Presenter

**Dave Prior** is a PMP, a Certified Scrum Trainer and also holds an MBA from the University of Texas at Dallas. Dave has been leading technology projects and teaching project management since 1995. His experience includes managing IT and Technology projects, programs and portfolios. In addition to his technology-related work experience, Dave also has extensive experience training project leaders and coaching organizations in managing projects using both Agile and traditional approaches.

While Dave has been working with Agile methodologies since 1999, during 2008 when he was Chair of PMI's IT & Telecom SIG, Dave began working with the Scrum Alliance to establish programs to help traditional project managers become more aware of and educated about Scrum and Agile. His work as an educator and speaker has provided him with the opportunity to lecture and teach classes in the U.S., Asia, the Middle East, Europe and Central America.

Go to <http://www.pmi-portland.org> or email [workshop@pmi-portland.org](mailto:workshop@pmi-portland.org) for more information.





# Professional Development Workshops

## Stop Playing Games

Friday, March 11, 2011

Stop Play Games—A new and entertaining perspective on overcoming politics on projects!

*Stop Playing Games!*, by best-selling author Rick A. Morris, takes a completely different look at project management, using games like “The Pricing Game,” “Guess the Truth,” and “Grapevine” to illustrate and help readers overcome the organizational politics on projects. This one-of-a-kind workshop from the author of *Project Management That Works* and *The Everything Project Management Book* dives deep into the topics of gaining buy-in from upper management, accurately estimating time and cost, controlling project communication, managing within corporate culture, taking care of your team, and more.

### Workshop Approach

Rick Morris will bring to life true issues and solutions which help Project Managers avoid the games we are forced to play in our projects. By sharing his years of experience, Rick will show you how to become stronger, more process oriented, and more respectful of your projects, stakeholders, and sponsors. By providing real world advice, Rick will help you learn and apply the proper techniques which will immediately impact your projects.

Project Managers have the unique ability to find shortcuts or workarounds in dealing with projects, sponsors, and stakeholders. However, in order to overcome the games in projects, all project managers must be able to:

- Influence without authority,
- Stop rounding projects, and
- Really focus on the basics that assure your success.

Let Rick help you assure organizational politics never stifle your ability to effectively manage projects.

### About the Presenter

**Rick A. Morris** is a consultant, author, mentor, experienced project manager, public speaker, and creator of a non-profit foundation to promote Project Management. His appetite for knowledge, vast experience, and passion for his profession has made him a highly sought after speaker for many different professional organizations, colleges, and universities. Rick’s blend of real world experience and down to earth delivery style makes his passion contagious.

Rick is currently the Owner and President of R<sup>2</sup> Consulting, LLC. He has written three books: *The Everything Project Management Book*, 2nd Edition; *Project Management That Works!*; and the latest and focus of this webinar, *Stop Playing Games!*, published by RMC Publications in October 2010.

To learn more about Rick please visit:  
<http://www.rsquaredconsulting.com/>

### Workshop Details

#### 8 PDUs

World Trade Center  
121 SW Salmon St., Portland, OR 97204

#### Cost

PMI Portland Chapter members \$239 / \$269 / \$299  
Non-members \$339 / \$369 / \$399  
(by 2/3 5 p.m. / before 2/17 5 p.m. / before 3/7 5 p.m.)

Go to <http://www.pmi-portland.org> or email [workshop@pmi-portland.org](mailto:workshop@pmi-portland.org) for more information.

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# PMP/CAPM Exam Prep Course

## April 2 through May 7

Prepare for PMP or CAPM certification through the Portland Chapter of Project Management Institute.

Experienced project managers ready to become certified Project Management Professionals (PMPs), and those looking to establish credibility in the application of project management processes as a Certified Associate in Project Management (CAPM), will benefit from this course which will help you prepare for—and pass—the Project Management Institute (PMI) examination.

Certified PMPs will bring the Project Management Book of Knowledge (PMBOK) methodology and real-world experiences into focus. They will walk you through what you need to know, step-by-step. Core study material will be covered over five Saturdays, with a complete review on May 7th, the last day of the course. Taking the test immediately after the course is recommended.

Attendance in the course will satisfy the education requirement for both the PMP and CAPM application. Students will receive a copy of the PMI PMBOK (4th edition), third-party sample questions, and course study guide.

Seating is limited so register today.

### Course Details

**Saturdays, April 2 through May 7**  
9 a.m. to 4 p.m.

### Cost

PMI Portland Chapter Members \$895  
Non-members \$1,095  
Registration ends March 25 at 5 p.m.

### Location

Hosted by DeVry University, Keller Graduate School of Management  
9755 Barnes Rd., St. Helens Room,  
Portland, OR

[Details](#)



# Special Event at SolarWorld Industries America

**Thursday, February 10, 2011 5:30 p.m.**

**SolarWorld Roundtable location No registration required**

We have scheduled Scott Haight, the Head of Planning and Investment for SolarWorld Industries America as our guest speaker for the February Roundtable. Scott has an extensive background managing projects of all sizes.

Scott's topic will be "Improving planning through better anticipation of the unexpected." His material will be drawn from his own experience and from a book titled "The Black Swan, The Impact of the Highly Improbable", by Nassim Nicholas Taleb.

In "The Black Swan: the Impact of the Highly Improbable", Nassim Nicholas Taleb focuses on that most dismal of sciences, predicting the future.

The problem, Nassim explains, is that we place too much weight on the odds that past events will repeat (diligently trying to follow the path of the "millionaire next door," when unrepeatable chance is a better explanation). Instead, the really important events are rare and unpredictable. He calls them Black Swans, which is a reference to a 17th century philosophical thought experiment. In Europe all anyone had ever seen were white swans; indeed, "all swans are white" had long been used as the standard example of a scientific truth. So what was the chance of seeing a black one? Impossible to calculate, or at least they were until 1697, when explorers found *Cygnus atratus* in Australia.

Nassim argues that most of the really big events in our world are rare and unpredictable, and thus trying to extract generalizable stories to explain them may be emotionally satisfying, but it's practically useless. September 11th is one such example, and stock market crashes are another. Or, as he puts it, "History does not crawl, it jumps." Our assumptions grow out of the bell-curve predictability of what he calls "Mediocristan," while our world is really shaped by the wild powerlaw swings of "Extremistan."

*Chris Anderson, editor-in-chief, Wired magazine*



# Excellence in Project Management Awards

The 2011 EPMA applications are now available.

There are three awards to apply for this year:

- Student Project of the Year
- Project Manager of the Year
- Project of the Year

Application deadline is **April 15, 2011**. Detailed information and application forms are available on the PMI Portland [website](#) now!

## Save Aug. 19, 2011 for Professional Development!

Don't miss the summer's biggest event! The highly anticipated **Managing Projects, Programs and Portfolios Conference** is scheduled for **Friday, August 19, 2011**.

Watch the PMI Portland [website](#) for and your email for details.



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## Workshop: Building Great Teams

PMI Portland Chapter members may attend this workshop at a reduced rate. It is sponsored by our partner, Oregon Organization Development Network. Chapter members may also attend [OODN](#) monthly meetings for free.

Struggling teams can be made good. Good teams can be made great. This two-day hands-on workshop is designed to show you how. Whether you're a team member or leader, project manager, or consultant, these sessions will transform the way you work.

The session focuses on research-driven tools that engage, drive conversations, and use images to shift thinking in new and different ways. At the end of the two days, each participant will receive a curated set of images and take-away tool that can be used to keep the momentum going.

#### About the Speaker

Christine Martell has been facilitating with a variety of organizations worldwide for 25 years. Her work integrating visuals with traditional corporate performance improvement methods has brought her global recognition. Martell holds a Masters of Science from Portland State University and a Bachelors of Fine Art from the Rhode Island School of Design.

#### Workshop Details

March 3-4, 2011  
9am - 4pm (lunch on your own at noon)  
Lake Oswego, Oregon

Member Cost\*: \$199 before February 25 (\$229 after)  
\*Discount applies to current members of Oregon ODN, ASTD-Cascadia, Portland HRMA, or Portland PMI.

Free Tool! Each attendee will receive a free Building Great Teams Participant Set—a \$45 value!

Info & Registration on the [VisualsSpeak website](#). Click here for a color [flyer](#).





# Membership News

## Welcome New Members!

- |                    |                       |                           |
|--------------------|-----------------------|---------------------------|
| Bairey, Stephanie  | Fisher, Richard       | Midthun, Brandon          |
| Barats, Holly      | Fitzgerald, Margaret  | Miskowiec, C              |
| Barton, Kyle       | Garzot, Amy           | Moll, Jeffery             |
| Batish, Arun       | Gilman, Lucinda       | Montgomery, Theresa       |
| Beltrone, Robert   | Haight, Scott         | Murphy, Edward            |
| Benjamin, Bradford | Harris, Chadwick      | Murray, Allen             |
| Bertrand, Ronald   | Houck, Ryan           | Murugesan, Santhil        |
| Boettcher, Paul    | Jackson, Michael      | Nau, James                |
| Brown, Barry       | Johns, John           | Olson, Jeffrey            |
| Carroll, Patrick   | Keck-Escalada, Helene | Pender, Marion            |
| Chiang, Tingi      | Khanna, Prateek       | Salamon Greene, Julia     |
| Condol, Ben        | LeVee, Jeffrey        | Sullivan, Francine        |
| Davies, Judie      | Levy, Laurie          | Swaminathan, Senthilkumar |
| Davis, Tyler       | Luken, Christopher    | Sweet, John               |
| Detrick, Lynelle   | Maharg, Michael       | Taylor, Richard           |
| Dilla, Samuel      | Marcus, Karina        | Thompson, Marc            |
| Do, Ly             | Marshall, Karen       | Tjipto, Max               |
| Duran, Elsa        | Martinson, Philip     | Tuttle, Chris             |
| Emerson, Robert    | McGrath, Dustin       | Vande Krol, Joshua        |
|                    |                       | Yeh, Hsiu-Yu              |

## Congratulations New Credential Holders!

- |                       |                         |
|-----------------------|-------------------------|
| Bouchard, Matthew PMP | Neumaier, Christian PMP |
| Brown, Jacquelynn PMP | Sinha, Amit PMP         |
| Gardner, Kelly PMP    | Thompson, William PMP   |
| MacCorkle, Staci PMP  | Werner, Philip PMP      |

Membership information is provided to the Chapter monthly by PMI Headquarters. There may be a delay in seeing your name on this page due to newsletter publishing constraints. Contact PMI Headquarters at [www.pmi.org](http://www.pmi.org) to change or manage your membership information.

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## PMP Credential Exam Changes on August 31, 2011

Read the article on [page 27](#) for more information. Go to [PMI.org](http://PMI.org) for complete details.

### Business & Technology Aligned

Ascendant Technology helps organizations large and small achieve business results by engineering end-to-end digital solutions. We understand data-driven marketing, multi-screen digital touch-points, and the importance of exceptional design and social engagement. We also understand enterprise web architecture, analytics, security, connectivity, and business process engineering. We incorporate the best of the enterprise web, the consumer web and the cloud have to offer and we deliver with an award-winning, proven software engineering approach and a global organization of experts.

Ascendant Technology has regional offices across the United States, Europe and Brazil. Atech is a recognized Premier IBM business partner and has garnered numerous IBM awards, including Best Portal Solution and SOA Innovator Award for the Lotus, WebSphere and Rational brands. Visit us at [www.atech.com](http://www.atech.com) or contact us at [sales@atech.com](mailto:sales@atech.com).





## Dianne Johnson, Director of Speaker Acquisition and Volunteer of the Month!



Please join me in congratulating Dianne Johnson, PMP, as the PMI Portland Volunteer of the Month for February. With a distinguished legacy as former Chapter VP of Programs and Past President, Dianne has developed a reputation for being a key go-to person for all things related to the Chapter. Her motto has consistently been, "Just let me know

what I can do to help." We've taken her up on that: as Chapter Historian, Dianne has agreed to compile and organize Chapter legacy documents. In November, she was appointed the Director of Speaker Acquisition. Her job is to provide high-quality and compelling education and keynote speakers for Chapter dinner meetings. She's since confirmed January's Chapter dinner meeting speakers, and booked speakers for February and March. Her goal is to have great speakers in place at least three months in advance—we're absolutely confident that she'll succeed. Please thank Dianne for her continued dedication to our Chapter and our profession.

She is an experienced senior project manager with ten plus years of project and program management experience in various industries including pet care, childcare, utilities, and corrections. Ask her to tell you about getting locked down in a Canadian prison one time during an installation.

Dianne has a Bachelor of Science in Communications from Westminster College in Salt Lake City Utah and earned her Project Management Professional (PMP) certification in 2003. She recently completed her MBA with the University of Phoenix.

Service seems to be part of Dianne's make-up. She is retired from the U.S. Army Reserve. Her military service included seven years U.S. Army active duty as a Public Affairs Specialist. Her more exciting assignments were in Germany in Berlin, Garmisch, and Bertchesgaden. The remainder of her military service was in the Army Reserve as a Legal NCO and a First Sergeant.

On a personal note, Dianne recently earned her Scuba Diving certification and after all the cold-water northwest diving is looking forward to her first warm-water dive this year. She and her husband are active in the local aviation community and are claimed by three dogs and a cat.

Contact Dianne at [speaker@pmi-portland.org](mailto:speaker@pmi-portland.org).

## Welcome Bill Jensen, Manager of Sponsor Services



Bill Jensen has 12 years' experience in the architectural and structural industries as a drafter and designer, working on residential and commercial projects. He graduated January 2010 from Eastern Oregon University with a BS in Business Administration.

Bill is starting his journey as a project manager by passing his CAPM exam, joining PMI Portland Chapter, attending Chapter meetings, and volunteering. He will be assisting Karel Rasovsky in the Sponsor arena to secure and cement sponsor relationships with PMI Portland Chapter.



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## Please Welcome Jayesh Mittal

Jayesh Mittal has accepted the position of Program Manager for the PMI Annual Conference event. This event involves almost every PMI Chapter Portfolio and intersects with many programs. The event requires planning almost year around and is considered one of the primary communication vehicles for PMI Portland Chapter with project management, educational and corporate communities.

With the background and experience Jayesh brings to the Professional Development Portfolio, PMI Portland can now look at further opportunities to expand on professional development for its membership.

Jayesh Mittal has over fourteen years in IT industry and extensive experience in diverse software and hardware platforms, providing management, leadership, analysis, design, development, migration and implementing business technology solutions.

Experience includes:

- Complete life cycle of software development projects including Waterfall and Agile Methodologies
- Various Industry Verticals including Life & Health Insurance, Retail, Distribution, Manufacturing, and Banking.
- Over 10 years of Onshore/offshore delivery models
- EDI Transaction including production support of EDI operations
- Proficiency in applying technology to produce integrated solutions that meet business needs

Professional Skills include:

- Excellent project management skills, with ability to manage multiple projects with changing priorities in a cross-functional environment
- Excellent organizational, coordination, interpersonal and team building skills
- Highly developed analytical and creative problem solving skills

- Excellent Analytical and problem solving ability and adaptability to work in all kinds of environment
- Ability to work independently as well as strong team player
- Ability to work in a high-paced, high-pressure environment with strong track record of solving complex business issues and delivering client satisfaction
- Strong communication and interpersonal skills

Contact Jayesh at [pdd@pmi-portland.org](mailto:pdd@pmi-portland.org).

## PMI Portland Chapter Grows Global Leaders!

You may have heard that Rachel Paulson, PMP, your current Past President, was appointed as the new Region 1 Mentor. This is the second time that our Chapter has had a leader rise to the global level of leadership, serving as Region Mentor within PMI in the last 6 years. Our Chapter continues to recruit key volunteers that not only make a difference for our Chapter and its members but grow into key volunteer positions that affect and influence members and credential holders worldwide.

What is a Region 1 Mentor? A Region Mentor acts as liaison to PMI Global Operations Center (GOC) and provides mentor support to component (Chapter) leaders with opportunities for collaboration, issue resolution, and the advancement of Chapter maturity.

There are 15 Regions globally with Region Mentors supporting them. Region 1 consists of Chapters from Western Canada, Alaska, Washington, Oregon, Utah, Idaho and Montana—there are 16 Chapters total.

Are you interested in a leadership position within the PMI Portland Chapter? Join us this year and take your first step toward global leadership as you volunteer for your community of project management practitioners.

Contact [volunteer@pmi-portland.org](mailto:volunteer@pmi-portland.org), or visit our [website](#) for volunteer opportunities. And remember, election nominations will be open soon!

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Some puzzles require a team effort



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## Would you like to volunteer?

Grow your network and your skill set! These are some of the volunteer opportunities currently available:

- **Webmaster Assistant** (Operations)
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- **Mentoring Program Administrator** (Outreach)
- **Director of Public Relations** (Marketing)
- **Social Media Manager** (Marketing)
- **Director of Branding & Communications** (Marketing)
- **Editors** (Marketing)
- **Proofreaders** (Marketing)
- **Art Director** (Marketing)
- **Newsletter Director** (Marketing)
- **Director of Marketing Sales** (Marketing)

For more information, go to the Volunteering [webpage](#), or contact our Director of Volunteers at [volunteer@pmi-portland.org](mailto:volunteer@pmi-portland.org). You will be glad you did!



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Robert Bondaruk PMP



Speaker Joe Prats



Speaker John Patton PMP



Nancy Hazleton PMP



The Tischlers and the Nichols'



Photos - Erik Odegard





# Flexible Project Management: Creating a Flexible Environment

Third of four articles in a series on flexible project management  
By Preston G. Smith and Jeff Oltmann

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## Broadening Agile

Agile software development—and agile project management—is a popular topic among project managers today, as it allows them to deal with the inevitable changes that occur in the middle of a project. But how do agile techniques apply to non-software projects? This is the third article in a series that explores that question.

Agile techniques are ideally suited to software development projects. But if your project is in another domain, agile is likely to be frustrating, because agile software techniques exploit characteristics, such as object technologies, that are unique to the software medium. Agile software techniques do not translate directly to other domains. Instead, people who lead non-software projects must understand how agile creates the flexibility to accommodate mid-project change, and then build a new system employing these principles.

In this article, we look at how to create a project environment that supports flexibility. Other articles in this series address more aspects of building a flexible project management system:

- “Agile Isn’t Just for Software”—the importance of using iteration, rather than strictly sequential processes, to maintain flexibility in a turbulent project environment.
- “Enabling a Flexible Team”—the impact of getting the right people on the project team, and then giving them authority and suitable space to work in.
- “Building a Flexibility Toolbox”—how project managers can flexibly plan projects and manage risks management.

## Apply Flexibility Selectively

Flexibility is not a universal blessing. It is a set of tools and techniques that can be applied to projects selectively to deal with uncertainty or the anticipated changes in a certain part of the project. The reason for this is that flexibility has its price, as we will discuss below. Consequently, development processes must be adapted to the kind, location, and timing of anticipated changes.

## Flexibility Pays Off When Change is Frequent

Many managers are anxious about flexibility because it leaves loose ends, which seem to be open invitations for budget overruns and slipping schedules. We believe that flexibility, when properly applied, actually reduces the range of likely outcomes in a project when uncertainty is involved.

Here is an example. Suppose your firm markets bicycle components and currently you are working on a new wheel hub. There are two styles of hubs for spoked wheels: the so-called “narrow flange,” where the hub’s overall diameter is about 45 mm (1.8 inches), and the “wide flange” style, which is about 75 mm (3 inches). Popular belief is that wide flanges improve torsional stiffness (beneficial) but, in fact, engineering calculations demonstrate that narrow flanges provide plenty of torsional stiffness, so the extra flange simply adds weight and manufacturing cost. After some initial discussion, the team decides to proceed on this controversial point by applying good engineering judgment and developing a narrow-flange version. This is what the project looks like at this point and this is how it is budgeted and planned:

	Cost	Time
Develop and test narrow flange	\$100,000	3 months
Total	\$100,000	3 months

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About two months into the project, after visiting some bike distributors, marketing decides that wide-flange hubs will sell better so they redirect the project from the narrow-flange plans (which are now sunk costs) so that it now looks like this:

	<b>Cost</b>	<b>Time</b>
Develop and test narrow flange (sunk)	\$ 70,000	2 months
Develop and test wide flange	\$100,000	3 months
<b>Total</b>	<b>\$170,000</b>	<b>5 months</b>

Now, the project is two months late and \$70,000 over budget. However, when the team encountered this uncertainty, they could have operated more flexibly to avoid most of the project disruption.

In the planning stage, when the uncertainty about the flange arose, the team instead could have flagged it as an uncertainty and kept it open until it was resolved. In this case, the team could have built prototypes of the two configurations, or simply bought competitive samples of them, and showed them to an assortment of customers, including the distributors. Then, when the market preference became clear, they could have proceeded with one design that would have been final. By delaying the decision on this uncertainty, the project picture now looks like this:

	<b>Cost</b>	<b>Time</b>
Prototype and exhibit both options	\$ 20,000	0.5 months
Develop and test the preferred one	\$100,000	3.0 months
<b>Total</b>	<b>\$120,000</b>	<b>3.5 months</b>

This approach costs a little more than the first one if the team happens to be lucky and pick the correct option, but is much cheaper than picking the wrong option. This approach also has the advantage of greatly reducing the \$70,000 and 2-month variance in outcomes between the first two pictures. In addition, the project would finish on budget and on schedule, because the prototyping would have been planned into it.

A relatively small upfront investment in prototyping and market research resolved an uncertainty that could have been very expensive later on. The value of this extra upfront insurance premium depends on how likely the uncertainty is. Therefore, the likelihood of uncertainty in your project should influence how and where you apply flexibility tools.

**Keep Critical Options Open**

Sometimes making decisions early in a project is a good thing, because it increases the number of stable anchor points that the project team can use to make sense out of chaos. Clearly, having many loose ends leads to blown budgets and schedule slippage; however, making decisions early in a rapidly changing environment has an insidious consequence because it may unnecessarily position the project in a tight corner when things inevitably change. An important part of building and maintaining flexibility is to keep open options that might change, which tends to run counter to the way project managers think and are expected to act. Project managers are usually paid to make decisions and to prune unnecessary paths, which seems to lead to greater certainty in their projects. Fortunately, there is a middle ground, called the “last responsible moment,” which allows project managers to establish sufficient stable anchor points by making early decisions, while deferring other decisions to retain maximum flexibility.

**The Last Responsible Moment**

This is a technique for identifying and keeping options open on critical decisions that might change later, such as the decision on hub flange-width, as discussed earlier. To use the last responsible moment technique, a project manager follows four steps:

1. Identify a decision that is uncertain at the moment and that might change later as new information arises.
2. Determine when this decision will have to be made to avoid incurring great consequences.
3. Schedule this point as the last responsible moment for this decision.
4. Start collecting information to help make a better decision by the time its last responsible moment arrives.

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Several conditions can determine when the last responsible moment occurs, such as an important option expiring or project cost rising abruptly at a certain point if the decision is not made (see Smith below, p. 155); usually, the last responsible moment is the earliest time out of all of these conditions.

The last bullet above is critical for distinguishing the last responsible moment from procrastination. Procrastination is simply being lazy about making a decision—putting it off because this is the easiest thing to do. In contrast, the last responsible moment is an active process in which you are busy collecting information so that you will be as ready as you can be when decision time arrives.

Making decisions in this way has two benefits. The first is flexibility. By definition, carrying a decision until its last responsible moment is not expensive, and it provides you with opportunities to change direction as late as possible without incurring unreasonable costs. Second, delaying a decision in this way allows you to make a better decision when the time comes, because when you make the decision, you will be working with the freshest, most complete information available for making it.

## Endpoint

Here are the essential points to remember:

- Flexibility has costs as well as benefits, so apply it only on projects—or parts of projects—where you anticipate change.
- The cost of flexibility is much lower than the cost of an 11th-hour project change.
- Actively open, maintain, and close options as you reassess your project's areas of uncertainty.
- In areas of uncertainty, make decisions at the last responsible moment.

The upcoming final article in this series will address areas of project management that must be handled differently in a turbulent environment: project planning and project risk management.

## Further Information

- Brandt, Jobst. *The Bicycle Wheel* (Third Edition). Palo Alto: Avocet. 2002. pp. 61–62.
- Smith, Preston. G. (2007). *Flexible Product Development*. San Francisco: Jossey-Bass.

## About the Authors



**Preston G. Smith** is principal consultant at New Product Dynamics in Portland, Oregon ([www.NewProductDynamics.com](http://www.NewProductDynamics.com)). He has specialized in responsive product development for 25 years and is coauthor of the time-to-market classic, *Developing Products in Half the Time*.

His book, *Proactive Risk Management*, won the

PMI David I. Cleland Project Management Literature Award for 2003 as the best piece of project management literature published in 2002. More recently, he has combined his involvement in the agile software development community and the rapid prototyping community with other sources to create this material on flexibility and the book, *Flexible Product Development*. For more on flexibility, see [FlexibleDevelopment.com](http://FlexibleDevelopment.com). Preston is a Certified Management Consultant and holds an engineering PhD from Stanford.



**Jeff Oltmann, PMP**, is principal consultant at Synergy Professional Services, LLC in Portland, Oregon ([www.spspro.com](http://www.spspro.com)). He is also on the graduate faculty of the Division of Management at Oregon Health and Science University. His specialties include strategy deployment, operational excellence, and project portfolio management.

Jeff is a seasoned leader with over 20 years of experience managing successful technology programs. He ran the Program Management Office (PMO) and a \$60M project portfolio for IBM's xSeries development facility in Oregon. Jeff's hands-on program management experience includes program budgets over \$100M and worldwide cross-functional teams of over 100 members. You can contact him at [jeff@spspro.com](mailto:jeff@spspro.com) or read previous articles at [www.spspro.com/resources.htm](http://www.spspro.com/resources.htm).





# The Color-coded Portfolio— Where is the Balance?

by Gareth Byatt, Gary Hamilton, & Jeff Hodgkinson

Regardless of whether you are a seasoned project manager or you are embarking on your first project, the use of “color indicators” or “symbols” to indicate the health or status of a project (or a program or portfolio) is most likely something you will relate to. We have touched upon it in a previous article titled “What Makes a Good KPI Framework”. The use of colors and symbols for project dashboards, project health, and project portfolio reporting is commonplace today in project and portfolio management. Whether or not you use traffic signal lights (i.e. Green, Amber, and Red) or other colors, the symbolism is the same. As an example, in the Green, Amber, and Red scenario, Green indicates “all is well”, Amber indicates corrective action is warranted, and Red indicates an important risk, issue or several of either need to be addressed and resolved. We support and encourage the use of this type of practice.

When you look into your organization’s portfolio, what do you see? Do you see a high portion of the same color (if colors are being used for metrics tracking) or a virtual rainbow spanning the reporting status spectrum? We contend that the key to using such status indicators is that they need to represent an accurate picture of health that can in turn provide a mechanism to enable “the right people to ask the right questions and get the right support”, to ensure work is appropriately managed. Having a large percentage in the “all is good status”, while it may appear good, could be a symptom of other issues. Let us elaborate.

To begin, let’s consider the purpose of project status indicators and why they are used. It is important that the agreed status (be it a Red light or something else) that signals “alarm bells” is not seen as an indication of poor project management or as poor performance by the project manager.

Status indicators are akin to warning bells on a ship. If you were traveling on an ocean liner, and a bell sounded indicating the ship was veering off course, would you rather know early, or wake to find the ship was in the Arctic when you were bound for the Caribbean (OK, this is a rather far-fetched scenario, but you

see what we mean)? Project status reporting is similar in principle. If used properly, a project status report should provide early signals about the need for any corrective action and allow recovery back to the planned course (or an accepted re-baseline) with the least amount of variance.

A project manager who is reporting that a project is outside of the “all is well” boundaries of performance is raising the flag or sounding the alarm that the project is not progressing as planned, and corrective actions are warranted. The reasons why the project is “off course” may be outside the span of control of the project manager, or they may be within their control. The project manager is doing their job by sounding the alarm and aiming to ensure that sensible discussions can be held at the appropriate time to resolve the matter. Early detection of veering off course and quick action to head off impending problems is vital to minimizing the likelihood of problems that, if left alone, will negatively impact success. The Code of Ethics of institutions such as the Project Management Institute (PMI) supports accurate and timely reporting on projects.

At any given time, even the most seasoned project manager operating in an organization that has mature PMO and project management processes will have a project that sails into choppy waters. By definition, projects achieve something new, and there is no formula for guaranteeing the success of new initiatives (although it is of course important to learn lessons from previous initiatives). How your organization recognizes and responds to such challenges speaks volumes about the processes you operate. As a “thinking framework”, we have provided a matrix and project status indicator format as an example at the end of this article.

There is no one magic ratio to indicate a healthy portfolio, program or project. Do you have standard rules (or metrics) to determine the indicator for each aspect of your project, or is it at the Reporter’s discretion to decide? This can be an important factor in how consistent your project status indicators are when you are reviewing a program or portfolio. Assessing against common standards is important. It is also important to understand the nature of the projects (their size, complexity, and risk). For example, you may have a high percentage of projects in the “all

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is well” category, yet these could all be low risk projects. Maybe one of your projects is an “outlier”, but it is much larger or riskier than the rest and could have a much bigger impact to your organization if it goes wrong. And size isn’t the only determinant of risk. Maybe one of your projects is small yet its success determines the success of many others, thereby being disproportionately important relative to its size. The concentration of summary status within a portfolio offers as much information about the organization assets as it provides about an individual project and the abilities of your project managers to manage their projects.

In conclusion, a portfolio at any given time will have a mix of projects, each with their particularities and status against metrics. The way that you use status indicators for reporting project performance and to anticipate future outcomes is an important mechanism to managing a portfolio. Instead of measuring a percentage of projects that are in the “not all is well” status, consider measurements such as how long projects stay in all types of status during their life, perhaps tracking it graphically. The duration of time that projects stay outside of an “all is good” (or whatever term you use) status may be a more telling measurement of project health than solely measuring the status of individual projects as a snapshot. If projects linger in “below par” status, it could be a signal of how your organization is responding or not to key actions required, or the project(s) not receiving needed resources or assistance. This may need calling out.

**Example Matrix and Indicator Framework**

Summary Arrow Options	Arrow Meaning Trend	Period to-Period	PM Confidence	SPI (Schedule)	CPI (Cost)	TPT (Weeks)
↑	Good-Up	Better	On Track: No impact	>.90	>.90	<26
→	Good-Steady	Same				
↓	Good-Down	Worse				
↑	At Risk-Up	Better	Warning: Possible impact	>.75 <.90	>.75 <.90	>26 <28
→	At Risk-Steady	Same				
↓	At Risk-Down	Worse				
↑	Trouble-Up	Better	Problem: Will be impact	<.75	<.75	> 28
→	Trouble-Steady	Same				
↓	Trouble-Down	Worse				
—	On Hold	On Hold	No status	N/A	N/A	N/A

**Explanation:**

There are several parameters that can be used for inclusion by the program/project manager to determine the proper ‘classification’ of their project at any given reporting interval for the regular status report. The up or down arrows indicate if there is an improvement or decline from the prior report given all the indicators for the project. It is an ‘informed’ judgment call by the program/project manager but any/all predictive information should also be included.

**Suggested Example Parameters:**

Metric	Explanation	Boundaries
PM Confidence	Current overall health of the project	<b>Green</b> state: the project is healthy <b>Yellow</b> state: the project is in trouble but recoverable <b>Red</b> state: indicates the project is failing
SPI	Schedule Performance Index	As shown in the matrix
CPI	Cost Performance Index	As shown in the matrix
TPT	Throughput Time	Based from the estimated completion date and SPI for the schedule delay

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### Clarifications:

As a rule, a project or program status should not change by one level week to week unless a significant change has occurred, either beneficial or detrimental to the overall project 'health' (one level meaning → to ↓ or ↑ to ↓). Any declining status should include the reasons as to why in your status reporting.

1. A sudden change from ↓ to ↑ (as an example) could be a 'flag' to hold a management meeting to understand the cause and agree on a mitigate remedy.
2. Any status of ↓ or less could be highlighted in a weekly critical issues/exception report and a mitigation strategy will be discussed with management.
3. A confirmed schedule slip or unplanned loss of resource occurring in the week that remains unresolved in the same week is a definite yellow or red condition depending on the impact and severity to the project overall.
4. Any stakeholder can make a recommendation, but the program/project manager owns final determination of the arrow condition of their project and is accountable for communicating the reason(s) why and any mitigation actions to resolve problems.
5. Any yellow or red condition remaining for "X" consecutive weeks, regardless of the improvement trend, may justify management intervention to determine why and to outline clearly what steps are needed to get into the green → or ↑ condition.
6. Project managers need to be accurate in their assessment of the project condition. To that point, a yellow or red flag should not be a perception of their performance, since in any project unanticipated issues and factors outside the direct control of the project manager can and do occur. Any performance judgment will focus solely on their accurate assessment of the reasons or cause and their progress in working the mitigation items to resolve.
7. Finally, all updates should be done on a regular basis (for example, by Monday noon each week) and actively reviewed by an appropriate person/team.

### About the Authors

Gareth Byatt, Gary Hamilton, and Jeff Hodgkinson are experienced PMO, program, and project managers who developed a mutual friendship by realizing they shared a common passion to help others and share knowledge about PMO, portfolio, program

and project management (collectively termed PM below). In February 2010 they decided to collaborate on a five (5) year goal to write 100 PM subject articles (pro bono) for publication in any/all PM subject websites, newsletters, and professional magazines/journals. They have been translated into Arabic, French, Italian, Spanish, Portuguese, and Russian and published on websites in Australia, Brazil, Canada, Costa Rica, France, Italy, New Zealand, Poland, Russia, UK, and the USA. Their mission is to help expand good program and project management practices by promoting the PM profession, to be a positive influence to the PM Community, and in earnest hope readers can gain benefit from the advice of their 60+ years of combined experience and expertise (and the expertise of co-authors who write with them on certain articles and subjects). Although all three are well credentialed, together they have the distinction in particular of being 3 of only 25 worldwide that hold the Project Management Institute's PMP®, PgMP®, and PMI-RMP® Credentials. Gary and Jeff have all five (5) of the PMI 'Family of Credentials'. As of December 31st, 2010, PMI confirmed we were the only two having these.

Along with writing articles, each also champions a role in the overall writing program collaboration process:

- Gareth manages all requests for additional guest author collaborations.
- Gary manages the article development tracking and readership metrics.
- Jeff manages the article distribution and new readership demographics.

Each can be contacted for advice, coaching, collaboration, and speaking individually as noted in their bios or as a team at:

[Contactus@pmoracles.com](mailto:Contactus@pmoracles.com).





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# PDU Category Structure to be Updated

Effective March 1, 2011, PMI will implement a simplified structure for categorizing professional development units (PDUs).

Based on customer feedback, the new PDU structure will be more user-friendly and better serve PMI's credential holders and the stakeholders who support them.

**If you hold one of PMI's credentials that require PDUs for maintenance, please be sure to register your earned PDUs in the continuing certification requirements (CCR) system prior to March 1.** No PDUs will be lost during this transition. After March 1, 2011, credential holders will need to report any earned PDUs that have not been claimed using the new categories.

## Overview of Changes

The restructuring will reduce the number of PDU categories from 18 to 6. The six new categories will be grouped under two divisions—"Education" and "Giving Back to the Profession."

All categories use the rule that one hour of learning activity is equivalent to one PDU. Categories have been expanded to include Web 2.0 learning opportunities.

There will be limits on certain categories in the "Giving Back to the Profession" division to ensure that all credential holders pursue project management continuing education as part of maintaining their credential.

## What is Not Changing

The three-year renewal cycle and number of PDUs required to maintain your credential will remain the same, as will the re-certification fee structure.

Please take a moment to go to the [CCR Category Update](#) page on PMI.org and read through the frequently asked questions and the new PDU Category Structure and Policies document to learn about the new PDU categories and for more detailed information about this update.

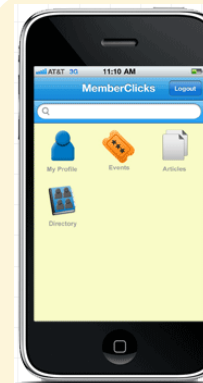


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## Get the iPhone App

Now you can view and use the PMI Portland Chapter website on your iPhone. Other smart phone apps will be added soon.

To download the iPhone app, click [here](#).



## Newsletter February 2011

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Website: [pmi-portland.org](http://pmi-portland.org)

## PMP Examination to be Updated in 2011

The Project Management Professional (PMP)® credential examination will be revised in 2011, based on updates to the professional role of a PMP® credential holder recently found by PMI's Role Delineation Study (RDS).

PMI conducts a Role Delineation Study for the PMP credential every five to seven years to ensure the credential reflects contemporary practice, evolves to meet current needs in the profession, and to comply with the PMP credential's accreditation against the ISO 17024 standard.

Project managers pursuing the credential or preparing for the exam in the upcoming year should be aware that approximately 30 percent of the PMP exam will change. Education and experience eligibility requirements for the PMP credential will not change, however.

As a result of the RDS, certain areas of the examination will be tested in a different way because an existing domain was seen to be common across all content areas of the examination. Specifically, the Professional and Social Responsibility content area (Domain 6) will now be tested in every domain rather than as a separate domain on the examination.

The RDS helped reveal that professional and social responsibility are integrated into all of the work of project management. PMI's Code of Ethics and Professional Conduct should therefore be viewed as now integrated into the day-to-day role of a project manager, emphasizing its importance in each phase of the project life cycle.

The new examination is scheduled to be released on **August 31, 2011**. This means that the last day to take the current PMP exam is August 30, 2011.

Candidates who would like to take the current version of the examination are advised to schedule early to ensure that they are able to obtain a test date before the update.

To reflect exam modifications, PMI has created and released a new PMP Exam Content Outline that will replace the current PMP® Examination Specification. You can find more information about the RDS and related examination changes on [PMI.org](http://PMI.org).

## Updates to PMI Learn: A New Look and New Functionality

PMI Learn is committed to our vast, global audience of volunteers and volunteer leaders who have diverse interests and needs, which vary from focused short-term, skill-specific learning events that help your performance in your volunteer role, to wide-ranging, long-term development as a Volunteer Leader. As one of the core programs of the Leadership Institute, PMI Learn serves to satisfy both the volunteer and career aspirations of PMI's most active and engaged members. The system provides a non-stop, on-demand eLearning environment for these members to access at their convenience.

To that end, you will begin to notice changes to our online platform. These changes will be both cosmetic, to align to our new brand standards, and functional, so that we may offer more content and learning opportunities.

In the near future, you will experience these changes yourself. Soon, when you click the "Launch PMI Learn" button at the bottom of the PMI.org "Leadership Institute" page, you will be brought to the Login screen of the new PMI Learn platform. To create your new PMI Learn account, under the "Existing User" section, ENTER THE USERNAME AND PASSWORD THAT YOU USE FOR THE COMPONENT SYSTEM and press the "Login" button. This will bring you to the "My Homepage" section.

Under "Required Training" there will be a "PMI Learn Guidelines" Module that you can view to gain access to your learning content. Since this is a test site, initially, you may experience problems logging on. If you have any problems or issues, please contact PMI Learn at [pmilearn@pmi.org](mailto:pmilearn@pmi.org).





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## Board of Directors

The Board of Directors wants to hear from you. Click on the email link to send an email.

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[President@pmi-portland.org](mailto:President@pmi-portland.org)

**President Elect** Steve Thornton  
[PresidentElect@pmi-portland.org](mailto:PresidentElect@pmi-portland.org)

**Past President** Rachel Paulson, PMP  
[PastPresident@pmi-portland.org](mailto:PastPresident@pmi-portland.org)

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[Secretary@pmi-portland.org](mailto:Secretary@pmi-portland.org)

**VP Finance** Shancy Saban  
[VP\\_Finance@pmi-portland.org](mailto:VP_Finance@pmi-portland.org)

**VP at Large** Terri Hagmann, PMP  
[VP\\_at\\_Large@pmi-portland.org](mailto:VP_at_Large@pmi-portland.org)

**VP Marketing** Suzan Reed, MBA  
[VP\\_Marketing@pmi-portland.org](mailto:VP_Marketing@pmi-portland.org)

**VP Membership** Jeremy Black, PMP  
[VP\\_Membership@pmi-portland.org](mailto:VP_Membership@pmi-portland.org)

**VP Operations** Jim Yan, PMP  
[VP\\_Operations@pmi-portland.org](mailto:VP_Operations@pmi-portland.org)

**VP Outreach** Jeff Brummel, PMP  
[VP\\_Outreach@pmi-portland.org](mailto:VP_Outreach@pmi-portland.org)

**VP Professional Development** Diane Brady, CSM  
[VP\\_Prof\\_Devel@pmi-portland.org](mailto:VP_Prof_Devel@pmi-portland.org)

**VP Programs** Terri Hagmann, PMP  
[VP\\_Programs@pmi-portland.org](mailto:VP_Programs@pmi-portland.org)

## Sponsor an event

Becoming a PMI Portland Chapter Sponsor is an excellent way to get in front of our 4000+ audience. Sponsorship gives your company a live presence at PMI Portland Chapter events and a visual presence on the website and in the newsletter. Contact Karel Rasovsky at [sponsor\\_programs@pmi-portland.org](mailto:sponsor_programs@pmi-portland.org).

## Speak at an event

If you would like to speak at a Chapter Dinner meeting contact [speaker@pmi-portland.org](mailto:speaker@pmi-portland.org). If you would like to present a workshop for the PMI Portland Chapter, contact [workshop@pmi-portland.org](mailto:workshop@pmi-portland.org).

## Submit an article

Write an article or book review for the newsletter. You can earn PDUs! Click [here](#) for details or contact [newsletter@pmi-portland.org](mailto:newsletter@pmi-portland.org).

## Quick Links

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## Mission

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

## Vision

To be the innovative leader in the region for advancing project management, making individuals and organizations more successful. We are a responsive and collaborative center of excellence promoting ethics, quality, knowledge, skills, integrity, and leadership.