



# Roundtable Discussion Notes

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### Facilitators:

Pam Banning  
Jeff Brummel  
Dave Cassinelli  
Paul Chirdon  
Terri Hagmann  
J. Hootman  
A. Lynn Jesus-Olhausen  
Dianne Johnson  
Joseph Marietta  
Jeff Oltmann  
Rachel Paulson  
Connie Plowman  
Jean Richardson  
Tim Runcie  
Greg Sievers  
Todd Williams  
Kevin Williamson

## Real-World PM Experiences

- “Real World” conflict differs from standard methodology through shortcuts
- A key point is to lead with solutions
  - Communicate bad news to team and client
  - Keep morale up for team
  - Tell the cost to the client
  - Keep team and client happy
- Move forward to correct the solution early to avoid finger pointing
  - Maybe attempt to split cost evenly
  - PM accepts responsibility
  - Work to acknowledge vision for end product
  - Provide options, dates and risk management
  - Face to face clearly understand issue
  - Lead with we’re in this together
  - Tell early and often
- It is in the Clients’ best interest to build and meet needs
- Sharing difficult news with stakeholder
- There is a saying: “Remember your sacred duty to disappoint”
- The Project Manager role has evolved over time, changing names, but the underlying principles have been the same
- The group represented large manufacturing companies to smaller service based industries but discussed some of the commonalities of approach and need for creating templates, even if using fairly unsophisticated tools (e.g. Excel)
- Some challenges:
  - Applying a structured methodology to a creative industry and the inherent conflict in trying to merge the mindsets
  - Impact of losing team members on the project timeline due to retirements, contract terminations, etc.

Recommended reading: “Handbook of Project Management” by James T. Brown

## Advanced PM Techniques

- Impressions of what advanced PM techniques are:
  - Soft skills
  - Managing people using methodology at organization to get from Pt A to Pt B
  - The better the manager, the higher the productivity of the team
  - Software techniques: Agile, Xtreme, Lean
  - Helping management understand what a PM is
  - Managing new generation which has skills in social networking
  - Skills in managing virtual teams and establishing a vision as a project leader when working with global teams

- We discussed SCRUM, the design of reusable templates, and the expanding role of a PM in advocating new business cases or bridging the gap between engineers and customers. We also discussed the value-add of PM in the journalism business and in government.
- Advanced PM techniques go beyond just project management. It is asking :
  - “How does my project help the client?”
  - How can I add value to the client’s strategy and to your own company’s long term business?”
- There is a need for a specializing in government projects – special techniques are required to deal with the different constraints experienced in government project, such as sponsorship changes and bureaucratic levels.

## Tools of the PM Trade

- Microsoft Excel
  - Used for all business processes, even with its limitations, because of its ease of use and flexibility
  - <http://www.office.microsoft.com/excel>
- Microsoft Project
  - Can be quirky
  - Many companies do not want to invest in another program
  - Value can be found in the ability for tracking, especially of large projects
    - You cannot efficiently track large projects on paper
  - <http://www.office.microsoft.com/en-us/project/FX100487771033.aspx>
- Primavera
  - Expensive, based on logic, used mostly in construction
  - Requires a lot of learning to use product
  - <http://www.oracle.com/primavera/index.html>
- Sage Software's suite of software products: ACT, Timberline and Peachtree
  - <http://www.sagenorthamerica.com/>
- LinkedIn
  - Good for finding contacts, gathering information and participating in groups
- Six Sigma
- MS Frameworks
- RATIONAL
- Lean
- Document management system
  - SharePoint
  - Livelink
  - PDF format for contracts, security sensitive documentation
- Clarity
- Lotus Notes
- SalesForce

- Email
  - Quickens process (e.g. approvals), faster than faxes
  - Provides good documentation
  - Not efficient for a document storage system
  
- Different methods use different tools e.g. Lean, Six Sigma, Agile, and the appropriate method depends on the complexity of the project and/or the degree of regulation
- More complex projects require more sophisticated tools to track the PMBOK knowledge areas
- It was recommended that a PM team pick one tool and build a managerial structure around the tool and those projects
- It was expressed that proper management and PM standards that are implemented around a tool will make the system effective and that the tool should be intuitive
- Tools have changed due to different leadership or companies merging to one methodology, or a need to capture additional regulatory requirements
- Critical PM tools, regardless of company size or industry, are lessons learned, setting expectations of customers, change management to manage scope creep, and need to review priorities with the plan sponsor
- Various members used tools to manage cultural changes as new processes are implemented (e.g. Kaizen and Lean) to successfully gain buy in and acceptance.
- Tools are helpful, but not a replacement for thinking
- Seek input from your team on collaboration tool's (e.g. SharePoint) structure
- The tools most likely will be only as good as the data entered

## **The Impact of Continuing Education (i.e.: Masters Degree) and Preferred Institutions and Programs**

- The identified expectations of a masters degree were:
  - Credibility
  - Staying ahead of the pack
  - Gain and improve upon skills
  - Sometimes seen as a minimum requisite of a given profession or industry
  - Learn the common language of a profession or industry
  - The investment and sacrifice of obtaining a degree shows long-term commitment to the profession
  - Quality of the actual taught content of the degree program
- The preferred institutions were:
  - Since we believe that the wisdom and knowledge gained from a degree are of paramount importance, it is recommended to seek out the best institution available
  - To take full advantage of a degree program, it's best to already possess a passion for the field and the ability to immediately apply the knowledge
    - A degree in a field you are currently working in allows one to apply the knowledge immediately, and to build upon your existing skill set
- Certifications were discussed as being important so resumes are not filtered out during the resume screening process, but are less important once the interview is set

- There appears to be a trend for Bachelors and Masters degrees being required
  - Also seeing these as filters with so many online tools that screen for required elements
- Resources for continuing education were briefly discussed and are listed here:
  - PMI Portland Chapter Courses, Workshops, Professional Development Day and online offerings
  - PSU continuing education with basic and advanced certification
  - Cadence Project Management Courses – full spectrum
  - DeVry & Keller Graduate School of Management
  - Unlimited Online Resources and Universities
  - Seattle Community College was recommended as a model, as was Clackamas Community College
  - CESolutions
  - Cadence was cited as a cost effective alternative because of the valuable, ready-to-deploy tools they have developed
  - Solutions IQ
  - SkillPort.com
- Many continuing education courses at universities occur at the second or third career stage – the trend is for those deep into their careers to go for this training
- The challenge as PM's is to know the future direction of project management and where your training really should be focused
- Discussed the importance of factoring in individual and corporate need when considering any extended learning
- Discussed the impending knowledge gap that will occur if we're not prepared as the senior PM groups begin to retire or switch careers and the newer PM practitioners are getting up to speed and efficiency
- Discussed knowledge trends based on publications our group participants have been reading:
  - PM's need to learn followership in order to be good leaders – discussed how classrooms are the safe environment to practice this teaching instead of potentially blowing it within a company or corporation
  - Conscious Energetics – also referred to as Presencing – which is being aware of what you're sending out both verbally and non-verbally – concepts revolve around analyzing energy linguistics
- Certifications
  - There were mixed results as to the project management certifications (PMI, PMI-SP, etc.)
  - The overall consensus was that it was good to have certifications in specific areas that you are applying for
    - Lots of certifications and interests tough to chase in markets, so you need to specialize in what you wanted
  - Real World experience may not be beneficial to passing PMP
    - Taking breaks during the PMP exam so you are not fatigued is a good idea (for those who can't sit long)

- What can you do to become more attractive to employers?
  - Real Word Experience helps
  - Don't hide your over qualifications (PhD's)
  - Need to communicate to employers your leadership abilities to take charge and produce results
  - Project Management is a non emotional systematic process, from the employers perspective
  - Resumes are reviewed and searched for very quickly, then filtered down to a manageable number
  - Most important is to get an introduction
  - Networking is top on the list for a PM and for job seekers
  - Highlight short sound bites and bullet points to highlight accomplishments (tangible for work history)
- Other educational opportunities:
  - Managing Project and Programs Conference
  - PMI National Conference in Seattle
  - ISSIG Symposium July 2010
  - Spspro.com (Jeff's site – repository)
  - PMI.org (national website)
  - PMI roundtables and Portland workshops
  - E-Learning
  - pmi-portland.org website
  - Project Management World Today – free subscription
  - Projects @ Work – free subscription
  - You tube (Max Wideman) – repository of knowledge website

## **Bleeding Edge PM Concepts – How to Stay Ahead of the Game**

- What are we doing differently today from tomorrow?
- Another term - Extreme Project Management
- Being open to new things
- Be flexible
- Consult across multiple industries
- Tools in the toolbox that lead to a hybrid type of PM
- Agile
  - Keep outside people out
  - Protect the sprint
  - Team gets tight
  - Can get ahead of plan
  - More nimble reporting / status reporting
  - Steps not very clear
  - Different players are involved. Different tools need to be built.
  - Difficult to show the waterfall of tasks

- Key points about Agile project management
  - Granularity of schedule is at deliverable level rather than task level
  - Communicate from the vision of Product roadmap or Product vision
  - Alternatives should be considered early in the life cycle
- Sometimes flies in the face of PMBoK
- Must look at the strengths and weaknesses of waterfall versus Agile, extreme programming or other methods (spiral), to produce results. Look at advantage of each development technique.
- Theory of Constraints (Buffer management, another way of critical path management)
- The changing environment of PM Tools
  - Twitter
  - SharePoint
  - Other Social tools
- Web based networking
  - Genisis
  - Communicator
  - GoogleWave
    - Interactive
    - Groupmail
    - Google docs like
    - Collaborative and realtime
- Virtual Teams
  - How do we create personal interaction when we don't see each other in person and face-to-face?
    - Spend lots of time on the phone (similar to the concept of management by walking around)
- Reporting tools that allow for single sourcing project data
  - Reporting on Team status and Executive status
- Distributed global partner development
  - Need to be aware of methods to manage development effectively when your requirements are defined in the US and your software is developed in China, India or Viet Nam
- Cloud Computing
- Collaborative Tools
  - Assembla – Xerox bug tracking
  - Vault – used with Autocad
  - Live meeting bridges
    - Webex
    - Go To meeting
- Skype
- IM
- “Wicked” Problems
  - [http://en.wikipedia.org/wiki/Wicked\\_problem](http://en.wikipedia.org/wiki/Wicked_problem)
  - We don't know what we are going to do until we discover more
  - Limited amount of funds
  - Demand Management

- Complexity
  - Complicated vs. Complex
    - Complicated: You know what you need to be doing, but you don't do it
    - Complex: When the outcome cannot be predicted to a stimulus. You cannot return to the previous condition because the variables have changed. For example, the banking crisis.
    - Complexity is a natural outgrowth of evolution
    - Projects longer than 9 months are harder to do by quite a bit of magnitude compared to projects shorter than 9 months
    - We cannot handle the complexity of time beyond 3 weeks. It takes 21 days to create a habit.
    - Bee-hives are Complex systems
- Programs vs. Projects
  - Projects: Labor intensive. Half a million to 1 million hours
  - Programs: Capital intensive. \$500 million to \$1 billion
  - Programs should not be managed as projects
- Bleeding edge concepts seem to be focused primarily on the core creatives
- Places to learn about bleeding edge concepts
  - Systems and Management Sciences
  - Institute of Science Engineering and Public Policy (ISEP)
  - Prominent retailers' (like Costco) sell publications
    - Products and new book releases often contain the newest concepts
- Discussion continued into challenges companies have with new concepts – technology or its limitations, politics, organizational size are all factors when determining how a company will accept new concepts
- Discussed the four “P’s” as discussed by William Bridges in his book “Transitions”
  - They are defining the Picture, Purpose, Part, Plan
  - Payback was added as an additional item
- Relational
  - Work with sponsor to educate on risk of not having a Project Manager
    - Change Management, communication management
    - Educate
    - Cost impact
    - Benefits
    - Risks
    - Resolutions
    - Be an impartial expert - interest to get project done most effectively
- Sales skills are one of the most important, if not THE most important, skill set for a project manager to have—“No” is bad word, sell the options; requires the project manager to always be one step ahead of everyone else
- Should have processes put in place with use of tools
- Microsoft Dynamics Suite
- MS Forecaster

Recommended reading: “The Rise of the Creative Class” by Richard Florida

Recommended reading: “Transitions” by William Bridges

## Soft Skills – Focusing on Leader and Team Development

- Know each of your team member's strengths and weaknesses, and evaluate the team as a whole so assignments can be made appropriately
- Myers-Briggs personality test
  - Gives team members insight into themselves and others so they can work together more effectively
  - Can be found online and can be taken for free: <http://www.humanmetrics.com/cgi-win/JTypes2.asp>
  - Can be taken for a fee: <http://www.myersbriggsreports.com/?gclid=CPWG0rvrtJ8CFRwUawodbjSE0g> and <http://www.myersbriggs.org/>
- Do What You Are: Discover the Perfect Career for You Through the Secrets of Personality Type by Paul D. Tieger and Barbara Barron-Tieger, Little, Brown and Company; 3 edition (April 1, 2001)
  - Team members who read this book after taking the Myers-Briggs can determine what they are best at and how to achieve success
  - <http://www.amazon.com/What-You-Are-Personality-Type-Revised/dp/0316880655>
- Use Learning Styles to determine team member's work style and use that to mentor them to best performance
  - <http://www.ldpride.net/learningstyles.MI.htm>
- People may not be delivering because they don't understand the assignment, are being given too much work by their manager, or have something else going on that can be easily overcome
- Before talking to a team member who is working under another manager, contact the manager to give them a head's up about your intended meeting
- The role of project manager takes people oriented skills as much as any other skill
- Conflict Management
  - Not legislating, but facilitating
  - If a problem arises, it's best to go to the individual
  - When it comes to project issues, always remove the focus from the person/people and make the process/thing the focus
- Project Management is really all about the art of communication and that is often 90% of project management
- Leadership and Project Management—are they the same or are they different?
  - Reference to J's pre-dinner presentation: How do we know we are taking the right hill? That is really the difference between leading and managing.
  - When leadership is not engaged in the beginning of a project, people often are unhappy with the outcome, for a variety of reasons, but it really boils down to continually managing expectations
    - Management really needs to stay engaged all throughout a project. It doesn't need to be deep engagement, but they do need to maintain a level of involvement (can give them small tasks to ensure they stay involved.)
    - Leadership Engagement Plans are a helpful tool especially when working as a contractor/consultant project manager for a project (should be agreed upon between project manager and management)

- Good leaders...
  - Give good direction
  - Give appropriate level of empowerment and trust those they empower to do the right thing
  - Inspire
  - Support
  - Remove roadblocks
  - Know what they know and know what they don't know; trust the experts/SMEs
  - Do not micromanage
- Level set in the beginning. Have conversations with managers/leadership and team members. What are your expectations of me as a leader/manager? What are my expectations of you as a team member?
  - Often you do not get a second chance, so try to make impressions count
- Always, always, always take time to write follow-up emails after conversations with managers/leaders. "Per our conversation, this is my understanding and how I will proceed forward..."
  - Also a good habit for project managers to encourage their team to use after their conversations/meetings
- Sometimes you have to sell the boss's boss if you aren't getting enough action from your immediate boss; or offer to take something off their plate
  - Sometimes micromanagement occurs as a result of a manager or leader just wanting to be involved; assign them tasks and deliverables, treat them as a team member—also serves to shift their focus a bit (and away from micromanaging) and gives them a sense of ownership

Recommended reading: "Do What You Are: Discover the Perfect Career for You Through the Secrets of Personality Type" by Paul D. Tieger and Barbara Barron-Tieger

Recommended reading: "Six Hats" by Edward DeBano

## **You Are New to Project Management – Now What?**

- What drew you to project management?
  - Project management has a broad appeal and more and more companies are adopting project management processes, job opportunities are growing
  - Multi-faceted profession, easily integrated with other areas, such as marketing
- Know that through experience, that will highlight individual strengths and interests
- Project management allows for continual growth and areas to improve
  - No matter your level of experience, you never know everything
- It is very important to network
  - Also volunteer and seek mentorship

## Cost-Effective Ways to Keep Your PM Skills Sharp

- Come to the PMI Chapter dinners and classes
  - Earn PCE's attending classes and participating in activities, meet other members and exchange information
  - <http://www.pmi-portland.org>
- Attend PMI Chapter Roundtables
  - Each roundtable is unique. They meet each week of the month at different locations.
  - They count toward PCE's
  - Share insights
  - <http://www.pmi-portland.org/mc/page.do?sitePageId=70654&orgId=pmi>
- Volunteer for outside projects that meet PMI requirements and submit them for PCE's.
- Use the site <http://www.projectsatwork.com>
  - They have short tips and tricks that can keep you sharp.
- Check out the resources at Rita Mulcahy's site (<http://www.rmcproject.com>) for free and for-fee classes and information
- Use templates for project management designed by project management process groups
  - These can be found on the Internet.
- Enroll in the mentoring program through the PMI Chapter, or find a personal mentor in the membership
  - <http://www.pmi-portland.org/mc/page.do?sitePageId=92437&orgId=pmi>
- Research projects that did not go well, and learn from the mistakes that were made
  - These can be found in legal sites on the Internet.
- Internet articles- NASA has a great web site with a section of Project Management articles by a published author and NASA project management guru.
- Look for peer review articles
- Talk to peers and share lessons learned
- Be open to self criticisms; ask "What did we do right? What did we do wrong? What can we do better?"
- Cost benefit analysis – the more cost effective means doesn't always mean no cost (free). Classes at college or prep for exams might be more beneficial despite the cost.
- US Department
- Free webinars are often offered which can provide excellent opportunities (for example, Microsoft Project webinars are offered by Microsoft)
- Read a PM book, blog, or white papers
- Neal Whitten was recommended as a great speaker and one always comes away with good "tidbits/ideas" after his seminars
- PMI Portland Chapter dinner meetings provide very cost effective education opportunities
- Use educational CDs during flights and other 'dead' times
- Team recommended that chapter develop a similar program of trading, sharing or loaning books, CD, DVD among chapter members
- Taking an inventory of where I am lacking and focusing on those
- Outreach program – Volunteering for Schools and Colleges
- 10 PDUs for being on the Board of a PMI Chapter, 5 PDUs for being a chair
- Internet has become an invaluable tool; just be aware of the quality of information you may be getting

- Take the hill! Pretty much on your own to define and execute your own growth and development plan
- Marry what you read with action; look for even small opportunities to put your learning into action
- ESI offer scholarships
- Microsoft Project Users Group (MPUG)
- Strive to work for a company that values education and is willing to pay for attending seminars and other training sessions
  - Get upper management buy-in, get the dollars and the time
- Look for “early bird” discounts for registering for events sooner, rather than later

Recommended Reading: “Getting to Yes” by William L. Ury

Recommended Reading: “Fish Sticks” by Stephen C. Lundin, John Christensen and Harry Paul

Recommended Reading: “The Art of Project Management” by Scott Berkun