

# February 2016 Archive

Across the Board **By Scott Merillat**



Scott Merillat

As the PMI-SFBAC treasurer, I am going to provide a high level financial overview of activities that occurred within our organization. As a reminder to our members, the board of directors uses the policy governance model. The treasurer position is separated from the finance volunteer team that processes our financial records.

The board extends our sincere appreciation for the operations finance volunteer team for successfully completing many projects this past fiscal year. The PMI-SFBAC finances are in good order. The operations team has completed historical consolidations and are current with accounts payables and receivables. New processes have been implemented to make payment processing faster and easier for payables and refund requests. Additionally, this past year, the operations team has moved to streamline finance activities by aligning our accounts with a single institution.

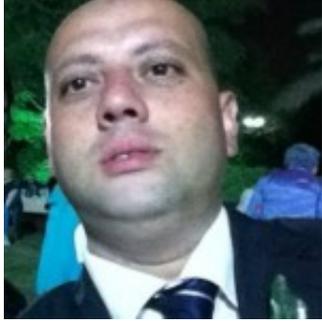
I am also pleased to report PMI-SFBAC has completed the annual external audit review for the 2014 calendar year. The financial review was completed by a local CPA firm that specializes with non-profit organizations. The final report will be presented during the February board of directors meeting, which identified no corrective actions. I extend my sincere appreciation to the operations team for working as one team to complete the audit inquiries with supporting documentation.

My treasurer position term will expire at the end of March. If you are interesting in giving back to the project management community, growing your leadership skills, and working with a diverse group of project management professionals, please consider becoming a board member.

As we prepare for the incoming board members, I am certain that the new board will be in a good financial position that will enable organizational longevity and growth. On behalf of the board, we extend our appreciation to all of the members of PMI-SFBAC for your continued membership, engagement in our programs, and volunteering. People like you make our organization successful. It has been my pleasure to serve this membership and support our continued success.

5 Tips For Effective Executive Sponsorship

By Ahmed Khalifa



Ahmed Khalifa

In today's challenging business conditions, corporate executives struggle to keep businesses running smoothly while effectively leading the changes in the corporate business environment. In many cases, these changes are managed in the form of programs or projects where executives play the role of sponsor.

The responsibilities of the sponsor include directing and leading the PMO teams towards achieving the outcomes desired and ensuring the realization of benefits. In fact, in many situations, projects and programs become the vehicle for implementing executives' strategic transformation aspirations. Hence, the success or failure of the PMO in delivering on these executive aspirations becomes the key for most companies. Bearing in mind this critical role, the executive project sponsor needs to be aware of the importance of their leadership style within the PMO team. Project sponsors must lead by example. There are a number of things sponsors can do to improve the PMO culture and increase the effectiveness of project sponsorship.

### **1.) BE PUNCTUAL**

When a sponsor arrives late for a meeting, they send a message that loudly says "I do not respect my commitments or the value of time". Unfortunately, if this is repeated multiple times, the PMO team may become affected. Executive sponsors need to be reminded that the PMO is about delivering results within limited resources – including time. Showing respect for time should be a top priority. How to show it? Is it enough to speak about it, and stress the importance of time keeping? The answer, in my opinion, is what Ralph Waldo Emerson said "Who you are speaks so loudly I can't hear what you're saying." People will only take you seriously if you are punctual. If your project is time sensitive and a single day of delay is going to cost you dearly, then don't be late for your appointments.

### **2.) CLEARLY COMMUNICATE AND PRACTICE CORPORATE PRIORITIES**

No company can excel at everything it does. In reality, companies should focus on excelling in one or two main areas. If there is consistent focus, these main areas will become valuable core competencies. Depending on the nature of the business and corporate resources, some companies choose to define efficiency as the priority for the business while others may choose customer service excellence. Whatever your company has defined as a priority, as an executive sponsor you need to communicate it continually to the PMO. In fact, the PMO's day-to-day decision-making should be dictated by the corporate priorities. For example, if customer service excellence is the corporate priority, this should drive all product specifications. By doing so, customer service excellence will become part of your corporate DNA.

### **3.) BE ENGAGED UNTIL THE END OF THE PROJECT**

Usually, projects get started with a lot of enthusiasm from everyone. Executive sponsors are often very active at the beginning of the project to ensure it is on track. After some time, some executive sponsors get busy with other activities and lose interest. Depending on the maturity of the project management culture, sponsors may lessen their supervision on projects, but this should not be an excuse to become disengaged.

Executive sponsors must make time to keep track of projects or delegate this role to another sponsor. The only time sponsors are allowed to stop overseeing a project is when the project is closed. For example, during the first month of an eight months project, the sponsor may meet with the team three times a week. In the second month once the project is on track, meeting frequency can be reduced to two times a week. Afterward, it can become weekly until the end of the project.

#### **4.) MANAGE BY EXCEPTIONS**

Executive sponsors should be accessible to PMO teams that require regular advice about decisions that impact project costs, quality or time. One effective technique sponsors can employ is to define tolerance levels for such parameters where the PMO team manages the decision-making. The executive sponsor should intervene only if tolerance levels are breached. For example, the tolerance level for cost is defined as 5% of the initial budgeted project cost. The project manager will bring the cost variation to sponsor's attention only if it exceeds 5%. Otherwise, the project manager can make the decision without referring to the sponsor.

#### **5.) RECOGNIZE AND OPTIMIZE YOUR LEADERSHIP STYLE**

Choosing the right leadership style for executive sponsors has a great influence on the PMO team. Executive sponsors need to review the situation regularly and choose the most appropriate leadership style based on the circumstances. This might be challenging for some executives if they are used to a particular style. However, it is a habit that can be changed if there is a will to change. For instance, some executives have the habit of micromanagement. If it is practiced continuously, it will have a negative impact on PMO team. It reduces employees' satisfaction and performance. An executive should consciously decide which style is more appropriate during the course of the project

The executive sponsor has a critical role in any project or program. Sponsors have the opportunity to create an impact and lead the changes in corporation more effectively. They should be aware of their leadership style and work on a plan to enhance their sponsorship skills.

*© Ahmed Khalifa 2015. Ahmed is a professional with 14 years of experience in the ICT industry, currently specializing in enabling C-Level executives to achieve their business vision by effectively running change and transformation programs aim to realize strategic benefits for corporates.*

<http://www.projecttimes.com/articles/5-tips-for-effective-executive-sponsorship.html>

#### **4 Things To Prepare For Before Kicking Off Any Project**

By Simon Horton



Simon Horton

If you have a project based business, you already know that many things can go wrong before the successful completion of a project. From budget to bureaucracy, anything can suddenly become a viable threat to your project. However, the most detrimental of them all is not knowing when you will finally finish the project successfully. Project management is a complex process and involves a lot of risks.

It calls for an extensive, as well as collective, attention to various budgetary, human and technical variables. Besides, a project often includes specialized factors that are critical to its success and need to be addressed for proper implementation. Now the question is: How do you define success?

Is it when you accomplish the scope of work? Or when your client pays for the project?

In most cases, businesses have no predefined success criteria to kick off a project. Worst still, many have a wrong set of criteria to begin with. There are instances where every person involved in a project had a different notion of what success is and this is the reason many projects fail.

Here are 4 things you need to prepare before kicking off a project.

## **1.) DEFINE OBJECTIVES**

The first thing is to understand what you need out of the project. Read the “Statement of Work” and decipher each item listed there. This document spells out the objectives, timeframe, scope, assumptions, high-level requirements, resources and everything else about the project. So read it thoroughly.

Most projects go wrong here. Managers fail to fully understand the objectives and scope, which in turn, affect the project’s cost estimation, timeline, and resources. Understanding of the objectives and scope of the project is one of the core requirements.

Now it is also important to understand that a project has more than one objective. It is therefore important to understand relative importance of each objective and define scope for them. For example, if the Statement of Work is to create an eCommerce website for a retail brand, the objective is more than creating a platform that allows online transactions. You need to first define the business model, based on which the eCommerce design will be decided.

In addition, you need to define other scopes such as shopping cart, log-in features, payment option and shipping, etc. In fact, scopes can be anything ranging from ideas to features that your client would like to incorporate.

Listing your objectives and scope will also help you to understand the various constraints that you are likely to meet on the way.

Let’s go back to the eCommerce website example once again. Do you want to create a new site or merge it with your existing website? What are the major challenges there and how you can overcome each of them?

In addition, you need to define the timeframe. Defining the scope along with the timeline is what brings you, the team, and your client together. In its essence, scope is the driving force of a project.

## **2.) RESEARCH AND DUE DILIGENCE**

Once you’ve defined the objectives and scope and had them approved by all parties involved, it’s time to determine where you stand, in terms of the project. Your research team needs to create a detailed report including the market opportunities and challenges. A few model questions you need to answer include:

- What are the current market trends?
- Who is the target audience?
- What does the target audience need?
- Who are the competitors?
- What is the competition up to?
- How can you help your client to be different than the competition?
- Is there any challenge the market is facing? If yes, list each of them

- How can you address the challenges?
- What are the problems (if any) your team is likely to face to complete the project?
- What are the best alternatives to solve the problem at hand?

Now, these are just some examples and there are more such questions. The goal is to get a clear perception so that you can go to the next step with due diligence.

### **3.) PLAN OF ACTION**

Your plan of action begins with defining roles and responsibilities. Some of the key players in a project are:

- Client/Project sponsor. They are the ones who fund and own the entire project and all aspects of the plan must be reviewed and approved by them.
- Business experts who will define the scope and approve the related documents.
- Project manager responsible for creating, executing and controlling the project plan.
- Project team to build the end product and is responsible to identify risks, design issues and quality.

In addition, there are others who actively participate in a project such as auditors, procurement specialists, and quality and risk analysts. During this step you also need to give a definite timeline for each activity. In other words, you need to estimate how much time is required to complete each task. Set relatively frequent milestones and deadlines to ensure that your project is on track.

Similarly, you need to prepare budgets and resource allocation. Budget is a crucial factor. Your aim should be to stick to your budget until the end or come in under budget. In terms of money spent, it is necessary for your team to know where they stand. Same goes for resources, which are the life-blood of a project. Also, make sure that the project team has the right skills and attitude for the successful completion of the project.

Finally, get the plan of action and each item mentioned above approved by your stakeholders.

### **4.) CONTINGENCY PLAN**

What if your Plan A fails? Developing a good “Plan B” is important. As discussed, there can be times, despite good planning, when things go wrong. This is why you need to invest your time and effort in contingency planning. This again includes risk assessment and determining what could go wrong.

You will need to create a backup strategy after identifying and prioritizing risks. The goal here is to address all business-critical operations, keeping everyone’s needs in mind. Also, keep the plan simple.

In addition, your Plan B should address outsourced resources and emergency funds, should you happen to need them.

### **CONCLUSION**

A lot of what we’ve discussed here revolves around understanding the objectives and scope of a project. From your client and stakeholders to your project team everyone should be aligned to the objectives and scope. Communication also plays an important role in successful project management.

Finally, understand and accept that there will be situations where you need to deviate from the specifications. This is why we recommend you to invest in contingency planning and have extra time for such changes and requests to both save time and avoid pain points.

© Simon Horton 2015. Simon is the Founder of ShopIntegrator.com, a hosted shopping cart store aAdd-in. His years of experience have helped him setting up this platform.

<http://www.projecttimes.com/articles/4-things-to-prepare-for-before-kicking-off-any-project.html>

Does Culture Have an Impact on Project Prioritization? **By Stuart Easton**



Stuart Easton

Over the last few weeks, I've been asking myself how much culture affects the way a PMO should, or can, operate. I'm based in the UK. I lived and worked for around 11 years in the US. As such, I am used to a certain way of working, a particular "Anglo Saxon" work culture. I have done business on 4 continents, so it's not like I'm culturally blind, but I'm sure I'm missing something.

But at TransparentChoice, I have the good fortune of supporting PMOs from all around the world – including countries with very different culture to what I'm used to. It's not just geography that affects culture, however. Government bodies, non-profits, educational and all types of for-profit companies – they all have different cultural and behavioral norms and I'd like to capture 'your' ideas and suggestions for successfully running a PMO in different cultures.

In this article, I would like to focus how projects get prioritized.

### **The Role of the Project Management Office (PMO)**

I'm going to dramatically simplify things here simply because this could be three or four blog posts on its own. Here's what I see as the main roles of the PMO.

- Project prioritization and selection
- Project governance / oversight
- Promotion of best practice / skills development

This blog covers the topic in more detail, but point 1 is, in my opinion, the most important.

### ***Different Types of Culture***

The literature on corporate culture is extensive... and I'm largely going to ignore it here, so apologies to any "People and Organization" junkies out there. I'm going to focus simply on what I've seen as the two main dimensions of culture that determine how quickly and easily an organization adopts a formal project selection process. You may have different ideas and they are probably as valid as mine – but this is based on observing many, many of our customers and on hearing the challenges faced by different PMOs around the world.

And the two dimensions are...

### ***Importance of Hierarchy***

Every organization has a hierarchy. In many Asian cultures, hierarchy is very rigid and people lower down are expected to be deferential to those higher up. In West Coast tech start-ups, the hierarchy is more about administrative tasks, and expertise is valued more highly than job title. So, hierarchy is a spectrum that we'll define as running from "Flexible" to "Deferential". The West Coast start-up is flexible. The Japanese banks tend to be very Deferential. Most companies fit somewhere in-between these extremes.

### ***Openness to Change***

Regardless of the role of hierarchy, I've seen companies that are very open to trying new things and to putting in place formal processes to improve productivity. Other organizations tend to be resistant to change and they tend not to reward innovation.

Other organizations, of course, are at the opposite extreme. As I write this (June 2014), Tesla Motors just "open sourced" a whole lot of their patents. That is clearly an organization that is open to trying new things in order to overcome roadblocks to growth (in their case, it's about increasing the speed of adoption of electric cars).

Most of us live somewhere between the two.

### **Four Project Prioritization Culture Types**

Okay, so we've defined the dimensions of "culture", at least as far as this exercise is concerned. Let's give each different types of culture a name and then let's look at what approach might work for them.

#### **1.0) Open Door**

An open door organization is one that is always looking for better ways of doing things. When someone has an idea, they tend to evaluate it quickly focusing on the value it will deliver. They then try it and, if it works, roll it out across the organization. If you work for an Open Door company, you won't face too much resistance, but you need to do your homework. In my experience, these companies tend to value people who know what they are talking about. A great place to start is with our blog.

#### **2.0) Structured Innovator**

Structured innovators are open to trying new things, so selling the idea isn't a problem. The challenge with these companies is that the PMO will be running meetings to facilitate building consensus typically with senior executives... and Structured Innovators have strong and fairly rigid hierarchies. This might feel uncomfortable for the PMO.

Using AHP to do project prioritization makes this a lot easier. The AHP methodology breaks a large, complex problem into much smaller, discrete judgments and, combined with good AHP software such as TransparentChoice, this is the key to success. There are three steps;

Meet with each individual executive and walk them through the process of making these small judgments. Take this opportunity to explain that the goal is to find disagreement between the different voters, as disagreement is what drives discussion, challenges ideas and helps everyone build a more complete picture of the decision. If you have "experts" who are giving their opinion, you should also collect their votes.

Review all the individual votes using a review group and identify where there is consensus and where there are real and meaningful disagreements. Use this to run a review meeting with the whole executive team. This is where you have to use your skill in moderating the discussion – the idea is to use the AHP tool to keep the conversation focused and "non political". You can download a free eBook on running an effective review meeting here.

Now you have built consensus, you are ready to make your selection, but you're doing it with a clear picture of the

value of each project.

### 3.0) Window of Opportunity

These organizations have a flexible hierarchy, but are not typically open to innovation and change. The flexibility in the hierarchy gives you a window of opportunity to introduce your new method, but you'll have to sell it. Simply prepare your prioritization model in the software and take advantage of the flexible hierarchy to "ask for help" from each exec. "I want your opinion on something – can I ask you a few questions?" Then show them the results – it will, most likely, be a real eye opener! We can help you prepare – this proof-of-concept program will help you get everything ready to show to your colleagues.

### 4.0) Brick Wall

This is a tough one, but there are more ways of getting past a brick wall. You could just keep banging head against the wall... or you could walk a little way down the wall and go through the gate. The simplest thing to do is use software, first of all, by yourself within the PMO. Create your own ranking system.

You might want to enlist a few "experts" to help you rank projects, etc. Then, when you present the projects to the exec team, simply show them your criteria weightings and project scores and say something along the lines of, "I found this really useful for organizing my thoughts for this complex decision..." Again, a proof-of-concept might really help sell it.

Most execs respond well to structured information and want to understand where it came from... and that's your opportunity to get them engaged.

*© Stuart Easton 2014. Stuart is CEO of TransparentChoice and is a veteran of the software space. His back ground includes stints working on reporting and data analytics and he is passionate about improving business outcomes for his customers. Stuart lives in the UK and enjoys hiking, mountain biking and playing with his kids. He also enjoys playing guitar... but his family would rather he didn't.*

[http://blog.transparentchoice.com/project-prioritization/impact-of-culture?  
utm\\_campaign=Project%20Prioritization&utm\\_content=11121818&utm\\_medium=social&utm\\_source=linkedin](http://blog.transparentchoice.com/project-prioritization/impact-of-culture?utm_campaign=Project%20Prioritization&utm_content=11121818&utm_medium=social&utm_source=linkedin)

Did You Know...?

that the PMI Education Foundation provides no-cost project management learning for nonprofits and NGOs to become more effective and efficient, and to help in recovery efforts to rebuild after disasters strike? Check out [How Project Management can be used in Your Nonprofit](#)

**and did you also know...**

[PMIEF's Resources for Youth](#) materials provides no-cost project management learning and teaching curriculum and other materials for primary and secondary school teachers and students to develop 21st century skills.

## Membership Certification

**By Mark Franks**

Professional development is all about the long game. But you can get noticed in the short-term with these simple career hacks. Building the skills and experience organizations look for in a project leader takes years of focused effort.

But there are also small steps you can take in the short term to position yourself for success.

Here are five project management career hacks that can help you showcase your skills — and stand out from the pack come promotion time.

### Acknowledging Chapter Members' Achievement of PMI Certification

by Mark Franks, PMP

As PMI members almost all of us are familiar with the PMP certification — in fact, we try to publish monthly the list of members who have recently achieved their PMP certification. What has gone under appreciated until very recently is that many of our members are attaining the other PMI certifications. Due to the membership database structure we cannot easily distill monthly data for these achievements; however, acknowledging the effort and accomplishment of these successes is important. We will strive to recognize our fellow Chapter members' achievements semiannually by listing all those that attain certification at the newsletter link

### Scopemasters — Develop your Communications Skills

By Chuck Siu

Toastmasters is not just a forum for better speaking skills, it's also a great venue for discussing, practicing, and perfecting communication techniques for all types of situations, from meeting facilitation to professional networking. The Scopemasters chapter adds a project management focus to the mix, and the result is valuable, PDU earning, meeting that can pay big dividends for the time invested. If you are interested in finding out more about Scopemasters please send an email to [scopemasters@pmi-sfbac.org](mailto:scopemasters@pmi-sfbac.org) and include your contact information. We'll get back to you with more details about how to be a part of this exciting organization.

Newsletter Team **Editor-in-Chief:** Sunil Prasad

**Professional Development Editor:** Susan Flynn

**Membership Editor:** Vacant **Web Layout Editor:** Lola Akanmu

**Web Layout Editor:** Vacant

**Editor-at-Large:** Vacant Have something to share?

Have something to share? You are encouraged to submit notes, articles, or interesting tidbits on relevant Chapter happenings or PM topics. Submit content to [Newsletter@pmi-sfbac.org](mailto:Newsletter@pmi-sfbac.org) We reserve the right to: edit content to fit space constraints, reformat to Newsletter style and decide appropriateness of submission. [Return to Top](#)

Newsletter Archives

Click [here](#) to access our archived newsletters. [Return to Top](#)