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Across the Board

Applying PMBoK Project Management methodology in global environments

By Rani Pangam

PMBoK methodology provides the fundamentals of Project Management framework for all projects and programs. When working in large global organizations, there is a realization that one size does not fit all and the approach needs to be customized to the project scope. There is a need to adapt the broader Project Management approach by functional areas, business units and sometimes regions in which the projects are deployed.

There is also another dimension of complexity and risk that needs to be added to get a comprehensive understanding of the scope so that the project delivery methodology can be tailored accordingly. The project milestones, activities, tools and deliverables should be scaled to the custom scope, risk and complexity. This mapping and scaling ensures that project's Critical Success Factors are met per stakeholder needs and with agility, but also keeping the commensurate project management controls.

Many organizations have adopted "Stage Gate Reviews" as a governance framework to complement the methodology. These reviews allow adequate checkpoints throughout the project to ensure methodology compliance and project readiness to move to the next phase of the lifecycle. Gate Reviews should include voting by all beneficiaries and impacted organizations of the project.

This democratic process allows "wisdom of the crowd" to prevail and make the right decision at the right time. Several examples of Stage Gate Reviews can be found on the internet. Roles and responsibilities are critical to establishing the right governance so decision making, prioritization and escalation processes are pre-established, enabling an effective Gate Review. Several examples of roles and responsibilities and RACI can be found online.

In sum, the custom approach along with the right governance and a standard set of tools and templates make the methodology adaptable at various levels of risk and complexity within global organizations.

© 2016 Rani Pangam. Rani, in past 13 years of my career, has held varying leadership positions in Risk Management, Audit and Project Management. Currently she is the Global Director of Enterprise PMO at Medtronic and Director-at-large at PMI SFBAC. In her role at Medtronic, she oversees Project Management, Change Management and Operations teams within the PMO. She is also certified in PMP, Scrum Master, ADKAR Change Management. She also volunteered as a Vice Chair on Medtronic Women's Network – Mentoring Committee. She holds a Masters' degree in accounting information systems from Bentley University, Bachelors' in Law and a Bachelors' in Accounting from University of Mumbai.



Rani Pangam

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Growing project management leaders

By Lindsay Scott

Our series of articles on the war for project management talent continues with the idea that organizations should be growing their own leaders – to reduce the need to find new talent externally and also to ensure that current employees are recognized, supported and developed.

Project managers, by and large, already demonstrate leadership skills in their everyday work and they are already given opportunities to demonstrate this capability on a day-to-day basis. The difference, in relation to talent management, is how project managers can be great leaders – not just good, and how this leadership can be applied to senior roles within the business, not just within projects.

There will always be differences in where a project manager wants to take their career.

Some will be happy working at a senior project level, others making the steps to program management and portfolio management. Others will have their eye on business lead roles like heads of departments or board levels.

An organization who wants to keep their talented project managers should have a clearer idea of the paths that interest their PM's through regular performance reviews and 1-2-1 with line managers. The question is, what can an organization do to make these aspirations work?

To be a great leader, an organization has to give its employees the challenges – the opportunity to be in different situations, with different people and with more complex objectives to achieve. The organization also has to do this in a supportive way – recognizing that throwing employees into the deep end without the support of, say mentors or development aides could lead to disaster.

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Lindsay Scott

10 No-Nonsense Behaviors That Lead To Exceptional Performance

By Neal Whitten

I want to talk to you about you... Success does not just happen — it is made to happen.

Success is born of behaviors and choices that lead to exceptional performance. In this article, I will reveal 10 important leading-edge, best-practice, results-oriented behaviors that will promote your professional and personal success. These are no-nonsense behaviors that I have observed over the years as being common among those who are the most successful.

Many of these behaviors you already know but you may not routinely practice. Some of these behaviors are often avoided. As you strive to achieve your dreams, these behaviors can lay the foundation for your journey. This article and each of the 10 behaviors apply to both PM's and BA's. Be prepared to rethink what constitutes effective behavior. As a senior guy who has been around the proverbial block many times, I will tell you: This stuff works!



Neal Whitten

Break The Rules Occasionally

Top performers break the rules occasionally. Pat McCarty, one of the 25 interviewed subjects in my award-winning book, *The Gift of Wisdom: Lessons for a Lifetime*, said, "Workplace rules are made for 95% of employees 95% of the time." Pat was not talking about breaking ethical or legal rules. She was talking about taking some risks—going outside the norm—pushing the envelope. If you would like to achieve exceptional performance, then you must think like an exceptional performer.

Oftentimes, you will find that following conventional rules will not effectively or efficiently solve an issue. Although few so-called "rules" are written within an organization, many rules are perceived; and it's the perceived rules that often cause members to limit their initiatives. You want to earn the reputation of thinking out of the box—of being creative in solving issues. Examples are proposing a radical new approach to solving a problem, joining forces with an unlikely person or group in tackling an issue or taking the initiative to doggedly pursue an issue to closure. I have found that, in most cases, it is better to beg forgiveness than to ask permission.

Manage Daily To The Top 3 Priorities

My experience is that most project leaders—most employees—do not know how to effectively manage their time. While most people start their day with a to-do list, the list is typically picked apart by working on the low-hanging fruit—the easier items; while the more important tasks

continue to be deferred like kicking a can down the road. I have found that the #1 reason why projects get in trouble is that the project's top three problems—or priorities—were not worked on a daily basis and resolved with the sense of urgency they require. It is your ability to solve your top three priorities that define your value and contributions to your project and organization and, ultimately, your career.

If I were to put you on the spot and ask you to state your top three priorities that you currently have going on with your project, and if you could not rattle them off in three snaps of the fingers, you are not a consistently effective leader. You might say, "How dare you judge me with so little information. I believe I am a good leader. Give me a few moments to think about my top three priorities, and I will identify them." But if you can't immediately identify them then it tells me that you do not manage to your top three priorities each day. Instead, you are managed by interruptions, noise, and minutia that come your way throughout the day.

You should start your day with a to-do list that identifies your top three priorities, successfully resolve—or put a plan in place to resolve—each of the top three priorities within a few days, replace them with new priorities—then repeat.

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Improving Business Processes

By Mind tools team

You probably use dozens of business processes every day. For example, you may go through the same steps each time you generate a report, resolve a customer complaint, contact a new client, or manufacture a new product.

You've likely come across the results of inefficient processes, too. Unhappy customers, stressed colleagues, missed deadlines, and increased costs are just some of the problems that dysfunctional processes can create.

That's why it's so important to improve processes when they are not working well. In this article, we'll look at how you can do this.

About Business Processes

Processes can be formal or informal. Formal processes – also known as procedures – are documented, and have well-established steps.

For example, you might have procedures for receiving and submitting invoices, or for establishing relationships with new clients. Formal processes are particularly important when there are safety-related, legal or financial reasons for following particular steps.

Informal processes are more likely to be ones that you have created yourself, and you may not have written them down. For example, you might have your own set of steps for noting meeting actions, carrying out market research, or communicating new leads.

The Importance of Efficient Processes

These different kinds of processes have one thing in common: they're all designed to streamline the way that you and your team work. When everyone follows a well-tested set of steps, there are fewer errors and delays, there is less duplicated effort, and staff and customers feel more satisfied.

Processes that don't work can lead to numerous problems. For example:



- Customers may complain about poor product quality or bad service.
- Colleagues get frustrated.
- Work may be duplicated, or not done.
- Costs increase.
- Resources are wasted.
- Bottlenecks can develop, causing you to miss deadlines.



Improving Your Team's Processes

When you encounter some of the problems mentioned above, it may be time to review and update the relevant process. Follow these steps to do this:

Step 1: Map the Process

Once you've decided which process you want to improve, document each step using a Flowchart  or a Swim Lane Diagram . These tools show the steps in the process visually. (Swim lane diagrams are slightly more complex than flowcharts, but they're great for processes that involve several people or groups.)

It's important to explore each phase in detail, as some processes may contain sub-steps that you're not aware of. Consult people who use the process regularly to ensure that you don't overlook anything important.

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Volunteer Opportunities

The PMI SF Bay Area Chapter is looking for volunteers to help meet the needs of its members. Currently we are seeking volunteers for a Director of Marketing, Content Marketing, Design/Layout and Social Media Marketing. If you are interested or know someone who might be interested in these opportunities then please contact vpvmm@pmisfbac.org for more information.

Did You Know...?

Did you know... Large projects are twice as likely to be late, over budget, and missing critical features as small projects. A large project is more than 10 times more likely to fail outright, meaning it will be cancelled or will not be used because it outlived its usefulness prior to implementation. (Source: The Standish Group: CHAOS Research Report 2013)

Did you know... Despite being the top driver of project success, fewer than 2 in 3 projects had actively engaged project sponsors. (Source: Project Management Institute: Pulse of the Profession 2014 – The High Cost of Low Performance)

Did you know... 68% of projects don't have an effective project sponsor to provide clear direction or help address problems? (Source: KPMG New Zealand: Project Management Survey 2010)

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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

Member Certifications.

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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 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

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Membership Editor: Vacant

Web Layout Editor: Lola Akanmu

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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. We reserve the right to: edit content to fit space constraints, reformat to Newsletter style and decide appropriateness of submission. [Return to Top](#)

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