



# Workshops and Forum Explanations

<u>Session Type</u>	<u>Date</u>	<u>Contents of Sessions</u>
<b>2 Day Forum</b>	November 6th-7th	§ The 2nd Annual Best Practices in Building & Managing an Effective Project Management Office (PMO)
~ Please note you must participate on both days to attend ~		
<b>2 Day Workshops</b>	November 6th-7th	§ PMP Certification Exam Preparation § No-Nonsense Advice for Successful Projects § The Earned Value Experience™
~ Please note you must participate on both days to attend ~		
<b>1 Day Forum</b>	November 6th	§ Risk Management Forum
~ Please note you must attend the entire forum to participate ~		
<b>1 Day Workshops</b>	November 6th	§ Role of the Business Analyst & Project Manager : The Business Analyst's Crash Course § A Primer to the Business Analysis Body of Knowledge § Catching the Agile Wave: Transitioning to Agile Project Management § Get the Right Stuff, Fast: Jogging with the User Requirements Roadmap § Object Oriented Analysis and Design § Paper prototyping: Using Visualization to Ensure You're Building the Right Software
~ Please note you must attend the entire workshop to participate ~		
<b>Half Day Workshops</b>	November 6th	§ Being an Evangelist for Portfolio Management (AM Workshop) § Continuous Improvement in Project and Program Management Methodology: Application of Enterprise Network Centric Operations (NCO) Architectures Capabilities to Project/Program Management (PM Workshop)
~ Please note you must attend 2 half day workshops to participate in the half day sessions ~		
<b>1 Day Forum</b>	November 7th	§ Business Process Excellence Forum
~ Please note you must attend the entire forum to participate ~		
<b>1 Day Workshops</b>	November 7th	§ Knowledge Management – What every Project Manager and Business Analyst should know about this emerging discipline. § OPM3 and Your 'C' Level § Clear Concise & Measurable Requirements – Are they Possible? § Business Rules: A Round Trip Journey on the Road to Success § Effective stakeholder and user involvement: Tools, techniques and the paradigm shift. § Getting To Usable Solutions
~ Please note you must attend the entire workshop to participate ~		
<b>Half Day Workshops</b>	November 7th	§ MS Project ® Best Practices (AM Workshop) § Certified Associate in Project Management (CAPM) (AM Workshop) § Creative Problem Solving: Harvesting Ideas with Creative Thought § Process Maps and Use Cases: Using the right tool for the job at hand
~ Please note you must attend 2 half day workshops to participate in the half day sessions ~		

## Two Day Forum

### Monday & Tuesday November 6-7, 2006

The Sessions below take Place on both Monday and Tuesday. Please note you must participate on **both days** to attend.

*If you want to attend this 2 day forum, all you have to do is select **B1** on your registration form and you are all set!*

## The 2<sup>nd</sup> Annual Best Practices in Building & Managing an Effective Project Management Office (PMO)

Monday November 6, 2006

### 9:00 AM **OPENING REMARKS**

Chairperson Lisa DiTullio, Director, Project Management Office, **Harvard Pilgrim Health Care**

### 9:30 AM **The Value of Implementing a Central PMO**

#### session summary

Project Management and Portfolio Management are critical endeavors for all large organizations. In the absence of a PMO, projects and portfolios are managed by individuals or small functional groups who often do not realize the impact that their projects have on the organization as a whole. Well-intentioned individuals and groups initiate projects, allocate resources, and commit to deadlines, but in so doing often negatively impact other projects or regular operations. A PMO can help alleviate these problems by establishing a common language for projects and portfolios, establishing specific roles and responsibilities, and defining work processes and tools that organize the myriad of project information large organizations often face. Organized and coordinated flow of information facilitates more effective analysis and decision making for single projects and for project portfolios.

#### key take- aways

- \* Project information is current, accessible, and filterable – Coordinated flow of information
- \* Project information looks similar – Common language, tools, work-processes, and reports
- \* People know their role – Establishment of roles and responsibilities from initiation to closure
- \* Projects have well-defined scopes, schedules, budgets, and human resource requirements
- \* Challenges of Implementing a PMO – Selling the concept and overcoming the challenges

**Lynn Jaeger, Ph.D., Manager, PMO, Wyeth Vaccines**

10:30 AM *Break*

### 11:00 AM **Project Management Office Workbook: Establishing a Common Methodology & Training**

#### session summary

Bayfront Medical Center has established a Project Management Office to facilitate, educate and demonstrate Project Management principles and methodologies. As the organization tries to transform itself from a reactive organization to a proactive organization and realize efficiencies and cost savings to meet the needs of an evolving marketplace certain tools are created. Thus, the project workbook was born.

## Two Day Forum (continued)

### key take-aways

- \* Effectively communicate across project teams using a project workbook.
- \* Have project contact information documented.
- \* Have project milestones documented.
- \* Document issues that arise during a project.
- \* Document training and go-live schedules.
- \* Introduce team members to project management methodologies.

**Paul Capello, PMP, Project Office Manager, Bayfront Health Systems**

**12:00 PM** Midday Wrap Up

**12:30 PM** Lunch

**2:00 PM** **Going Beyond the IT Centric PMO and the Three Key Success Factors To Achieve– Establishing the Business Impact**

### session summary

PMO at American Modern Insurance Group was established in March of 2000 with a manager and 5 business analysts. Led today by Mark Heitkamp, PMO VP, the group has more than doubled in size but more importantly, has established itself as a solid business partner with proven excellence in smooth project implementation, increased coordination and communication, problem resolution and solid management of scope, timelines and accountability.

### key take-aways

- \* Evolution of Project Office (starting a Project Office)
- \* Enhancing our ability to reach organizational goals
- \* Project Office – 3 Key Components
  - o Project Planning and Portfolio management
  - o Project Execution
  - o The “Art vs. the Science” of Project management
- \* Key Take Away Items: “How have we achieved our organizational goals?”

**Rhonda Schwartz, Sr. Project Manager, American Modern Insurance Group**

**3:00 PM** Break

**3:30 PM** **Implementing a \$3 billion Capital Improvement Program (CIP) Using a State-of-The-Art Project Controls System**

### session summary

This talk will describe the key elements of the PCS, the program management approach used to implement CIP projects and how lessons learned are captured to enhance organization maturity. The audience will find that the project management approach is easily transferable to any entity who wants to deliver projects in a cost effective manner.

## Two Day Forum (continued)

### key take-aways

- The key elements of a well designed and performing project controls system
- How is the PCS used to track, monitor, report and perform predictive analysis of the program performance
- How does a PMO use lessons learned to enhance organizational maturity
- How can such a PCS be scaled and repeated on other programs
- What is the cost of developing such a Project Controls System

**Matt Smith, Jag Salgaonkar & Larry Gibson, PMP, Orange County Sanitation**

**4:30 PM** Afternoon Wrap Up

**5:00 PM** End of Day

## The 2<sup>nd</sup> Annual Best Practices in Building & Managing an Effective Project Management Office (PMO)

Tuesday November 7, 2006

**9:00 AM OPENING REMARKS**

**Chairperson Lisa DiTullio, Director, Project Management Office, Harvard Pilgrim Health Care**

**9:30 AM Building and Maintaining a Program Office to Support Strategic Initiatives**

### session summary

Using a program management office to implement initiatives can take on many different forms. The strategic positioning of the office is dependent on a company's industry, structure and critical needs. In his presentation, Rick will share the best practices – what works, what doesn't – employed during the evolution of his program management office at Prudential.

### key take-aways

“Program Management Office Success Factors”

- Adapting to change – understanding and staying ahead of the changing business environment
- People – creating a team with the right mix of skills
- Marketing – selling to the “internal customer”
- Measuring – capturing and communicating results to manage perception

**Rick Radice, Vice President, Program Management, Prudential Financial**

**10:30 AM** Break

**11:00 AM OPEN SESSION**

*Email Lisa Deutsch for more information, ldeutsch@iirusa.com*

**12:00 PM** Midday Wrap Up

## Two Day Forum (continued)

12:30 PM Lunch

2:00 PM **Value of Integrating PMOs**

Lisa DiTullio, Director of HPHC Program Management Office & Louise Shah, Director of the Perot Project Delivery Team

3:00 PM *Break*

3:30 PM **Merger Integration Alert: This Date is not Made for Walking**

### session summary

This presentation will focus on the value and critical role of overall Program Management during all aspects of Merger and Acquisition -- from strategic inception, merger planning, integration planning -- through delivery and integration execution. This will provide an overview of the M&A Framework and Roadmap depicting the key major phases of an acquisition or merger, highlighting the activities that are essential during each phase, and providing insights into real world realities and lessons learned.

### Topics Addressed

- Dealing with Industry Trends and Economic Shifts
- Enterprise Project Management
- Risk Management

**Mary Elizabeth Ferraro & Steven M Barger, Greenbrier & Russel, Inc. A Fujitsu Company**

4:30 PM Afternoon Wrap Up

5:00 PM End of Day

[BACK TO CONTENTS](#)

## Two Day Workshops

**Monday & Tuesday November 6 - 7, 2006 9:00 – 5:00**

The Sessions below take Place on both Monday and Tuesday. Please note you must participate on **both days** to attend.

### **PMP Certification Exam Preparation**

*If you want to attend this 2 day workshop all you have to do is select **B2** on your registration form and you are all set!*

The PMP certification is the unquestionable international standard for today's professional Project Manger. This intense workshop will benchmark the understanding of the PMBOK concepts and processes for the beginner as well as the seasoned practitioner who is seeking this certification.

A thorough review of the correct answers and why they are correct, will lead you to understand PMI's standards for passing this exam. You will leave with a firm understanding of your needs for preparing for and successfully passing the exam.

*Learn how to:*

- Develop a personal study plan for the exam preparation
- Master the nine Knowledge Areas of the PMBOK
- Effectively prepare for success on your exam

**Jerry Brown, PMP, Project Methods**

### **No-Nonsense Advice for Successful Projects**

*If you want to attend this 2 day workshop all you have to do is select **B3** on your registration form and you are all set!*

Successful projects don't just happen—they are made to happen.

Popular speaker and best selling PM author Neal Whitten takes leadership and project management to a personal level and reveals leading-edge best practices that make all the difference between leading consistently successful projects and playing the victim with troubled projects. Focusing mostly on leadership and soft skills, but including hard skills and life skills, this seminar reveals choices to make and behaviors to adopt that are invaluable in helping a person become a successful project manager and leader.

*Learning Objectives:*

- \* Identify best practices that will cause your behavior, decisions, and actions to become more deliberate, effortless, and natural as you lead
- \* Identify personal attributes—leadership and soft skills—that contribute to your success and the success of your project
- \* Recognize how to boost your confidence in taking charge and making things happen
- \* Create a culture that fosters the success of your project
- \* Identify ideas that promote the advancement of project management/organizational concepts

**Neal Whitten, President, The Neal Whitten Group**

## Two Day Workshops - continued

### The Earned Value Experience™

*If you want to attend this 2 day workshop all you have to do is select **B4** on your registration form and you are all set!*

Are you confused about Earned Value and how to actually implement on your projects? You are not alone. The “Earned Value Experience”™ is a two-day workshop that will leave you un-confused about Earned Value and ready to apply it. Through a combination of lecture, example, and workshop you will plan a project, install an Earned Value baseline, and experience the dynamics of Earned Value management. You learn how to convert project progress into Earned Value metrics and learn how Earned Value illuminates the real progress and real cost of work done.

*This session will cover:*

- Understand Earned Value Management terms
- Implement Earned Value Management to project metrics
- Analyze project performance using Earned Value
- Create meaningful Earned Value charts and graphs
- Avoid common Earned Value traps
- Reduce Earned Value implementation effort and cost
- Meet Government expectations in Earned Value Management Reporting
- Overview of the ANSI EVM Standard (ANSI 748)

**Ray W. Stratton, PMP, EVP (Earned value professional), Author, President, Management Technologies**

**BACK TO CONTENTS**

## One Day Forum

**Monday November 6, 2006 9:00 - 5:00**

The sessions below take place all day on Monday. Please note you must attend the entire forum to participate.

*If you want to attend this 1 day forum, all you have to do is select **B5** on your registration form and then select your November 7th activity*

### Risk Management Forum

**9:00 AM OPENING REMARKS**

**Judy Balaban, Director of PMO, Dow Jones & Company**

**9:30 AM Operational Risk Management and its Benefits**

#### session summary

Topics to be addressed during this session include Scope & Operational Risk Management at the functional/trial level as well as Tools, Metrics and the Impact of Operational Risk Management.

#### key take-aways

- Methodology and techniques of Centocor's Operational Risk Management Process
- Risk metrics
- Benefits for implementing a risk management process

**Matthew Snowden, PMP, Clinical Planner, Centocor**

**10:30 AM Break**

**11:00 AM Assessing and Managing Risks for Effective Partnerships**

#### key take-aways

- Key reasons for failure and causes of success in alliances
- How to identify key risks that could stop your alliance from reaching key objectives
- How to manage and adapt the alliance relationship over time
- Techniques and tools you can use to decrease business risks in your partnerships

**Deborah Romjue-Bailey, Alliance Manager, Eli Lilly and Company**

**12:00 PM Morning Wrap Up**

**12:30 PM Lunch**

## One Day Forum - continued

### Verification and Validation: A Risk Based Approach to Transforming Business Requirements into

2:00 PM **World-Class Acceptance Tests**

#### session summary

In industry there is an emphasis on requirements elicitation, analysis, specification, and management. However, one of the most overlooked responsibilities of the job is Requirements Verification and Validation. Without good acceptance testing you can not be confident that all your hard work matters. Good testing will ensure that your end users are truly happy. Just testing is not enough, a systematic targeted approach is necessary. This session will convey the practical application of a risk-based testing approach to the creation of an acceptance test battery by:

#### key take-aways

- Creating the functional hierarchy for a real-world example, which includes a strong emphasis on the end
- Performing a risk assessment of the functional hierarchy, which includes empirically calculating risk through
- Gathering relevant, meaningful metrics for the example system, then focusing on adding intuition to the
- Utilizing “tried and true” testing techniques to target an acceptance test approach based on risk
- The end result is the ability to report out on the readiness of the system with a high degree of confidence

**Robert Green & Dan McKenzie, PRICE Systems**

3:00 PM *Break*

3:30 PM **Role of BA and PM in Risk Management**

#### session summary

It was a good piece of work you did, and you delivered it to the customer. And when they got it, they looked at it, then they looked at you and said, "That's not what we had in mind!" You can't deliver what's expected if you don't know what's expected. And you can't know what's expected if your customer can't articulate what it is that they want. And even then, how can you be sure that throughout the development process, you will remain true to what they want? The answer to this greatest of riddles is SE – Systems Engineering.

Listen to the true and astonishing tale of IBM's intrepid pioneers who risked it all to reduce risk! Who took their time to save time! Who spent more money to spend less, and delivered full scope, on time and on budget, with frighteningly low defect rates. Learn how they found fame and fortune as their adventures were chronicled in a "no-holds-barred" CASE STUDY at the prestigious Stevens Institute of Technology, and was subsequently published in the INCOSE SE Journal. Truth, indeed, is stranger than fiction..

#### key take-aways

- The principles of Systems Engineering (IBM's implementation of CMM principles).
- How these principles were applied on a particular project.
- What the results were in terms of risk, schedule, cost, scope and quality.
- How these results compared to a control group of similar projects.

## One Day Forum - continued

Jim DiPiante, Executive Project Manager, IBM

4:15 PM **Open panel forum with all presenters**

5:00 PM End of Day

[BACK TO CONTENTS](#)

## One Day Workshops

**Monday November 6, 2006 9:00 -5:00**

The sessions below take place all day on Monday. Please note you **must attend the entire workshop** to participate.

### **Role of the Business Analyst & Project Manager : The Business Analyst's Crash Course**

*If you want to attend this 1 day workshop, please select **B6** on your registration form and then select your November 7th activity/activities*

During this one day workshop, you will learn how to cut costs and delays by improving communication between business stakeholders and developers through comprehensive requirements analysis, modeling and documentation. You will get a quick immersion in all the key knowledge areas of Business Analysis, including Requirements Gathering, Data Modeling, Object-Oriented Analysis (OOA) with UML 2.0 and Use Cases. Upon completion of this workshop, you will be able to effectively gather and communicate the needs of the business to users and to the technical team.

#### **Session Learning Objectives**

- \*Improve the quality of interviews with users using techniques that guide you through the process, showing you what questions to ask and when.
- \*Conduct group (JAD) sessions for capturing and verifying requirements, using state-of-the-art interviewing techniques – including use cases and Object Oriented Analysis.
- \*Write a comprehensive and unambiguous Business Requirements Document, communicating the needs of the business to users and to the technical team
- \*Use UML 2 – the current industry OO standard - in preparing business requirements and diagrams.
- \*Create requirements documentation that can be used as the basis for customized development, maintenance of existing systems and/or as selection criteria for off-the-shelf software.
- \*Gather business requirements using traditional Structured Analysis and Object-Oriented Analysis (OOA).
- \*Describe complex business logic and ensure completeness of testing using Decision Tables.
- \*Understand basic concepts of iterative development.
- \*Specify business processes with use cases.
- \*Assure quality through structured verification and validation techniques and use-case scenario testing

**Phil Vincent, Adjunct Professor, Boston University**

### **A Primer to the Business Analysis Body of Knowledge:**

*If you want to attend this 1 day workshop, please select **B7** on your registration form and then select your November 7th activity/activities*

Until recently, Business Analysis Professionals have had to rely on their own experiences and the shared experiences of their peers to provide them with guidance on how to do their jobs properly. There was no external standard that agreed to best practices.

## One Day Workshops - continued

That changed in April of 2005 when the first release of the Business Analysis Body of Knowledge was issued. The BA BOK reflects the sum of knowledge within the profession of Business Analysis and reflects what is currently accepted best practice.

The BOK formally documents Business Analysis areas of knowledge, their associated activities and tasks and the skills necessary to be effective in their execution. Upon completion of this workshop, participants will be able to:

- Describe the Business Analysis Body of Knowledge, its major knowledge areas, and their purpose and contribution to the overall body of knowledge
- Discuss each Knowledge Areas value and outputs, how they can be used to support the other knowledge area activities and deliverables
- Apply the practices within each knowledge area of the BOK using a case study approach
- Discuss how the BOK can be applied to external projects

**Kathleen Barret, President, IIBA & Senior Business Consultant, BMO FINANCIAL GROUP**

### Catching the Agile Wave: Transitioning to Agile Project Management

*If you want to attend this 1 day workshop, please select **B8** on your registration form and then select your November 7th activity/activities*

Agile methods (Scrum, eXtreme Programming, Crystal, Feature Driven Development, etc.) have been sweeping into the mainstream over the past few years. Industry leaders have discovered that, implemented appropriately, agile accelerates project delivery times, increases customer and employee satisfaction, and provides flexibility to changes in business requirements.

But agile methodologies also leave the role of the project manager largely undefined, resulting in confusion and apprehension among project practitioners currently in these roles. How can project managers best transition to assume responsibility and add value on agile teams?

In this hands-on, interactive workshop, participants will learn how to combine the newer breakthrough principles of agile methodologies with complementary time-tested project management practices to deliver business value in high-performance roles on agile projects.

- Get an Introduction to the Agile Process and Learn the Business Motivation for Agile
- Learn Where Agile and Traditional PM Practices Collide
- Learn Agile Project Planning, Agile Estimation, and Agile Project Tracking Techniques
- Learn How You Can Use Agile Thinking on Traditional Projects

**Roland Cuellar, Jim York and Rodney Bodamer, Director, Senior Practice Manager, Managing Consultant, CC Pace**

## One Day Workshops - continued

### Get the Right Stuff, Fast: Jogging with the User Requirements Roadmap

*If you want to attend this 1 day workshop, please select **B9** on your registration form and then select your November 7th activity/activities*

The problems that result from specifying ambiguous and incorrect requirements are a major source of software failure and customer dissatisfaction. This experience-based workshop shares effective, time-tested practices for developing requirements quickly without compromising quality. Attendees will learn how to define user requirements by following a requirements roadmap. The roadmap provides a useful framework for exploring requirements using multiple, interwoven models, various representations of requirements, and “just enough” explanation. For each model in the roadmap, participants will explore these essential elements: What is it? Why use it? What does it do? How do I develop it? Attendees will also study the links between the models as well as ways the models can be adapted to suit a project.

*Key learning points include:*

- Considerations for selecting models for your projects
- The requirements model roadmap – how to use it for your project
- Ways to speed up the requirements modeling process without compromising quality
- When to lighten the requirements models and when to go deeper
- Good practices that supplement requirements modeling

**Ellen Gottesdiener, Principal Consultant, EBG CONSULTING, INC.**

### Object Oriented Analysis and Design

*If you want to attend this 1 day workshop, please select **B10** on your registration form and then select your November 7th activity/activities*

This workshop is designed to provide a practical, effective and repeatable process for using Object Oriented Analysis and Design to develop functional business requirements, test scripts, and design classes. With the help of Unified Modeling Language (UML) diagrams, a current case study will be presented, that includes theory and realistic application of Objected Oriented practices, to the business analyst and project manager. Upon completion of this seminar, the software practitioner should have the skills to bridge the gap between business requirements, technical design, and testing.

*Summary Points*

- \*Be able to define the project scope, system boundaries, business users and all system interfaces with one Object diagram.
- \*Learn how Object Oriented Analysis will easily define all business processes, data points, and business rules during the discovery phase of eliciting business requirements.
- \*Find an effective method of consistently eliciting, analyzing, verifying and validating business requirements by defining business objects that persist throughout the lifecycle of the project

## One Day Workshops - continued

\*Know the comprehensive list of every deliverable that should be included in business requirements, technical design, development and testing phases.

\*Shorten the Software Development Lifecycle by moving traditional design activities into the requirements phase

\*Generate test-scripts at the same time as your business requirements

\*Learn about the using effective modeling tools for UML

\*Find out what Object Oriented Analysis and Design does not address, and how to include the missing deliverables

**Brad Carroll, PMP Project Management Office. Sr. Project Manager, COMSYS IT PARTNERS**

### Paper prototyping: Using Visualization to Ensure You're Building the Right Software

*If you want to attend this 1 day workshop, please select **B11** on your registration form and then select your November 7th activity/activities*

Requirements are seductive – just build to the list, right? Companies focused on requirements and requirements management alone may have done themselves a disservice. Leveraging some tools from the world of Usability Engineering can help BAs to be more visual in their approach, more engaging in their delivery and yield better feedback and more appropriate definition – leading to better products in less time.

*This session will cover:*

\*Requirements – where have we gone wrong?

\*Intro to UX (IxD, UX, IA, etc)

\*Presentation, lesson, and hands-on exercise in paper prototyping

\*Using prototyping / simulation to extend the richness and reach of your application definition

\*Real-world customer case studies

**David Walker, Product Evangelist, iRise**

**BACK TO CONTENTS**

## Half Day Workshops

### Monday November 6, 2006 Workshops 9:00 -12:00 \* PM Workshops 2:00 – 5:00

The sessions below take place on Monday. Please note you **must attend 2 half day** workshops to participate in the half day sessions.

#### AM Workshop

### Being an Evangelist for Portfolio Management

*If you want to attend these half day workshops, select **B12** & **B13**, then choose your November 7th activity/activities*

This workshop will focus on preparing for implementation of an Integrated Portfolio Management System (IPMS) by focusing on internal functions and preparation that must be determined in order for portfolio success. The ongoing implementation and adoption of an enterprise wide IPMS tool is a continued challenge to demonstrate value to various stakeholders and steer the cultural / social changes brought about by this process. The approach covered in this session is to treat implementing an IPMS as a project with all the steps of project implementation: Scope, Requirements, Risks, Issue Tracking, WBS/schedule, Quality criteria and most of all Integration.

1. Implementation Project Plan
2. Definition of what output / reports you wish from the IPMS
3. Marrying your process and the IPMS
4. Characteristics of the project / portfolio / program scorecard
5. A whole bunch of stories and lessons learned.

**David L. Davis, PMP, Chairman, PMI eBusiness SIG, AT&T**

#### PM Workshop

### Continuous Improvement in Project and Program Management Methodology: Application of Enterprise Network Centric Operations (NCO) Architectures Capabilities to Project/Program Management

*If you want to attend these half day workshops, select **B12** & **B13**, then choose your November 7th activity/activities*

It takes a paradigm shift in business processes and organization structure to develop and manage the people, processes, tools, and skills needed to create NCO focused products and services for internal/external usage. As an industry leader in NCO based System of Systems programs, as well as instigator and founding members of the NCO Industry Consortium (NCOIC), Boeing has been forced to reinvent the way it manages projects and programs along NCO tenets to achieve maximum efficacy on these next generation efforts.

## Half Day Workshops - continued

### PM Workshop (continued)

Reviews of Enterprise Network Centric Operations (NCO) Architectures Capabilities  
Analysis of the impact of these capabilities on existing business systems  
Examples of how these have been applied to current and future Boeing programs  
The NCOIC, how Boeing is supporting and benefiting from the consortiums efforts  
**William. J. Purpura, Technical Project Manager, Boeing**

**[BACK TO CONTENTS](#)**

## One Day Forum

**Tuesday November 7, 2006 9:00 -5:00**

The sessions below take place all day on Tuesday. Please note you must attend the entire forum to participate.

*If you want to attend this 1 day forum, all you have to do is select **B14** on your registration form and make sure you select your November 6th activity*

### Business Process Excellence Forum

**9:00 AM OPENING REMARKS - Top level overview of the core concepts**

**Steve Goo, Vice President of Program Management and Business Excellence for Boeing Integrated Defense Systems (IDS), Boeing**

**9:45 AM Implementing Six Sigma Projects & the Change Management Issues**

#### session summary

An overview of the Six Sigma Process, DMAIC principles and all the statistical tools required to conduct a thorough analysis. Now that you have the skills, how do you make this work in your organization? We will talk about project selection, establishing reachable goals, mitigating scope creep, getting buy-in and support from management, persuading SMEs that the project is worthwhile, deal with change management issues, getting your point across, and communication styles and requirements to maintain enthusiasm about the project. Then we will discuss utilizing DMAIC principles. Are all of them and their respective tools required to manage a successful project?

#### key take- aways

- Finding opportunities for process improvements
- Selecting the Right Project
- Developing Your Support System
- Managing your Six Sigma Team
- Communication, Communication, Communication
- Which DMAIC Principle/Tool to Use

**Chelsea Gaillard, Analyst & Project Manager, Merck & Co., Inc.**

**10:30 AM** Break

**11:00 AM Merging Lean and Six Sigma To Achieve Results Quicker**

#### session summary

Service Master Embarked on the Six Sigm Journey in 2001. While showing results at a 2 to 1 return, we felt there was still opportunity to improve the process. We looked into other processes and found Lean Methodologies. Our dilemma was to integrate them seamlessly.

#### key take- aways

- Integration of the 2 methods
- Application in the Transactional World
- How to improve results

**Greg Boal, Master Black Belt, The ServiceMaster Company**

## One Day Forum - continued

### 11:45 PM **W. Edwards Deming taught the Japanese World class manufacturing, how might he have thought about project management?**

#### session summary

Traditional project management success is measured as conformance against plan. W. Edwards Deming taught that conformance to process and his System of Profound Knowledge were preferable to conformance to plan or specification. He believed that focusing on process, productivity and variation created a culture of continuous improvement and ultimately led to better economic results, whilst conformance to plan encouraged heroic effort and a lack of repeatability.

Deming's work is widely admired and implemented in manufacturing and production processes. How might it be adopted into the project management body of knowledge and how would it affect the way we manage and run projects?

David Anderson has adopted Deming's thinking into his work on project management and the Software Engineering Institute's Capability Maturity Model Integration. This talk will explain how conformance to process is reconciled with iterative project planning, tracking and reporting and how project managers can avoid making what Deming called Mistake #1 (tampering) and Mistake #2 (not intervening when appropriate to do so).

**David Anderson, Architect and Methodologist, Microsoft**

12:30 PM Lunch

### 2:00 PM **Successful Coexistence: Compatible Ways Improvement Approaches are Being Deployed at Boeing IDS**

#### session summary

The world of continuous improvement can at times be quite confusing. From Malcolm Baldrige to Lean to ISO to many others, there is any number of approaches that a company can use to improve. Yet, doing more than one is often required to be successful in today's marketplace. Determining how these improvement approaches complement each other and can successfully coexist can mean the difference between significant improvement and mass confusion.

#### key take-aways

- Hear why it was important for Boeing Integrated Defense Systems to determine the relationship between its improvement approaches
- Learn Boeing Integrated Defense Systems' view of how its improvement approaches fit together
- Discover five key considerations for comparing and contrasting improvement approaches

**Debbie J. Collard, Director, IDS Business Excellence, The Boeing Company**

3:00 PM *Break*

3:30 PM **Open panel forum with all presenters**

4:45 PM Closing Remarks

5:00 PM End of Day

**BACK TO CONTENTS**

## One Day Workshops

**Tuesday November 7, 2006 9:00 -5:00**

The sessions below take place all day on Tuesday. Please note you must attend the entire workshop to participate.

### **Knowledge Management – What every Project Manager and Business Analyst should know about this emerging discipline.**

*If you want to attend this 1 day workshop, please select **B15** on your registration form and make sure you chose your November 6th activity/activities*

Knowledge Management (KM) is directly relevant to our project world because knowledge is the fuel that keeps out organizations alive and thriving competitively. Specifically, within the world of project management and business analysis, our goal is to optimize and leverage knowledge assets, tools and techniques for and from projects creating value for the enterprise.

*This workshop will:*

- discuss Knowledge Management in general (as applied to the enterprise);
- provide a framework for effective KM practices within project teams and related organizations;
- highlight what innovative organizations are doing to integrate Knowledge Management practices with Project Portfolio management;
- discuss the relationship between: Knowledge Management; IT Management; Analysis, Design and Innovation; and, Project / Portfolio Management; and,
- present frameworks for Knowledge Management – tools and techniques; developing the high-performance project based organization.

**Joel S. Alleyne, Chief Information and Knowledge Officer, Borden Ladner Gervais LLP**

### **OPM3 and Your 'C' Level**

*If you want to attend this 1 day workshop, please select **B16** on your registration form and make sure you chose your November 6th activity/activities*

PMI's OPM3® is a model designed to assess project management maturity within an organization and implement continuous improvements. So ...

When you are talking with your 'C' level about project management matters do you ever feel like you are speaking a foreign language?

How often do you walk away from a conversation about business analyst issues with your 'C' level wondering what just happened?

## One Day Workshops - continued

Bridging the gap between 'C' speak and understanding the importance of project management maturity is key to achieving and sustaining success for you and your organization.

Clearly there is no "silver bullet", but PMI's OPM3® is focused on aligning understanding and closing the gap between 'C' level thinking and the value of project management practice.

*This session will:*

- Introduce you to OPM3.
- Show how OPM3 helps bridge the gap between strategic objectives and project activity.
- Present a typical 'C' level conversation.
- Provide practical tips and hints on engaging the 'C' level in an OPM3 discussion.

**Kim Sienkiewicz & John R. Winter Director of Program Development, International Institute for Learning**

### Clear Concise & Measurable Requirements – Are they Possible?

*If you want to attend this 1 day workshop, please select **B17** on your registration form and make sure you chose your November 6th activity/activities*

This full day workshop will arm those who contribute, write, review or verify requirements with various techniques to pull out of your "bag of tricks" to ensure you write clear, concise, and measurable requirements. It isn't a secret, requirements engineering, specifically writing "good" requirements is really hard to do! While working with 100's of product development teams at Intel, we have developed a key word driven syntax, adapted from Tom Gilb's Planning Language (Planguage) which allows teams to write requirements that can be re-used over and over for subsequent projects.

This hands-on workshop focuses on how to improve the quality of written requirements. We will introduce many techniques that can be used immediately.

*Upon completing this full day workshop, participants should be able to:*

- Define and understand the attributes of a "good requirement"
- Explain the different ways to specify requirements
- Write functional requirements using a simple syntax
- Write non-functional requirements so they are verifiable
- Know where to find more information on the topics presented

## One Day Workshops - continued

This workshop will provide you with the necessary skills to take this methodology back to your organization to begin using it effectively right away.

**Debra Lavell, Program Manager, Intel**

### Business Rules: A Round Trip Journey on the Road to Success

*If you want to attend this 1 day workshop, please select **B18** on your registration form and make sure you chose your November 6th activity/activities*

Business rules are an essential part of business analysis because they define, constrain or enable the behavior of software or business processes. Rules are at the heart of functional requirements. Deriving, specifying, verifying, and validating business rules that are high quality—correct, consistent, clear and complete—is an enormous challenge for business analysts. This advanced workshop will take you on a three-part journey. In part 1, you will identify business rules that further define analysis models such as events, state diagrams, use cases and the logical data model. During part 2, you will dig into the details of writing atomic (very granular) business rules and use the six categories of rules and their syntax to write precise, testable, business rule statements. We complete our roundtrip journey in part 3 by threading the business rules back to the requirements models that will enforce or implement them. This journey will provide you with specific tools and techniques to enable you to succeed with business rules in your requirements efforts.

*Key learning points include:*

- Describe the necessity of eliciting and analyzing business rules
- Use focus questions to uncover business rules
- Write precise, testable business rules
- Use business rules to test the completeness and correctness of user requirements
- Trace business rules to other requirements
- Describe the value of separating business rules from requirements.

**Mary Gorman is a Senior Associate at EBG Consulting**

### Effective stakeholder and user involvement: Tools, techniques and the paradigm shift.

*If you want to attend this 1 day workshop, please select **B19** on your registration form and make sure you chose your November 6th activity/activities*

## One Day Workshops - continued

Effective stakeholder and user involvement on any project can mean the difference between delivering business value quickly or building yet another product/process that no one wants to use. So how do you avoid hearing: "I can't use this, that's not how we (insert an operational business activity here)" or "Who says we have to do it like this...when did the business rules change?"

Wouldn't it be nice, even rewarding to have your company anticipate your next product with excitement?

Learn how to identify and invest stakeholders and users

Learn what to do to make sure that the project is meeting your stakeholders' interests and needs

Use your project team's time wisely: learn the essentials for designing and running 3 key types of collaborative workshops

**Michal Patten, Senior Consultant, Agile Adaptive Management**

## Getting To Usable Solutions

*If you want to attend this 1 day workshop, please select **B20** on your registration form and make sure you chose your November 6th activity/activities*

For solutions to be successful (internally and commercially) they must provide the required features/functions and must be designed so that those functions are usable by the identified users doing the identified work. Doing this right the first time reduces the total cost of ownership for applications. Ongoing enhancement and maintenance work is reduced and anticipated business benefits are achieved.

Usability: what it is and what it isn't

Introduction to the best practices a business analyst can use to get to usable solutions

Working through the practices with examples and templates

Integrating usability into requirements work

**Brenda Kerton, Research Lead, Info-Tech Research Group**

**IIBA POSITION: Chair, IIBA Body of Knowledge Committee**

**BACK TO CONTENTS**

## Half Day Workshops

**Tuesday November 7, 2006 - AM Workshops 9:00 -12:00 \* PM Workshops 2:00 – 5:00**

The sessions below take place on Tuesday. Please note you must choose from 2 half day workshops to participate in the half day sessions.

### AM Workshop

#### **MS Project ® Best Practices**

*If you want to attend this half day workshop, select [B21](#), then choose your other November 7th workshop*

If you need to plan a project, it's simple – just use Microsoft Project! Assign a junior member of your team, have them enter the dates of all the tasks, and you are done. Unfortunately, many projects experience serious difficulties based on these simple, but flawed, assumptions. This session starts with how Microsoft Project works behind the scenes and shows you the best practices for developing and tracking a project plan that is understandable and maintainable. The session includes techniques and tricks that can make your MS Project “experience” much more enjoyable. It is aimed at novice to intermediate MS Project users who want to use MS Project more effectively and efficiently.

- Learn the assumptions MS Project makes about your project and how it will behave.
- Learn to use a few key essential features in MS Project to create plans that can adapt to change
- Learn how to add and balance resources while minimizing its impact on the rest of your plan
- Learn how to effectively print or export your plan so you can get credit your hard work
- Learn to avoid MS Project “gotchas”

#### **John E. Moore, PhD, Systems Engineer**

*John E. Moore is a systems engineering who supports software project planning, software project tracking, and process improvement for a CMMI level 5 organization.*

### AM Workshop

#### **Certified Associate in Project Management (CAPM)**

*If you want to attend this half day workshop, select [B22](#), then choose your other November 7th workshop*

PMI's Certified Associate in Project Management (CAPM) Certification is quickly becoming the certification of choice for anyone who works on projects, or project managers who are not ready to pursue PMP Certification. Now, more than ever, CAPM certification is a great addition to a manager's resume!

## Half Day Workshops - continued

In order to earn CAPM certification, you must first demonstrate experience in project management. The exam tests your understanding of the processes of project management and the ANSI standard on which these processes are built. This session will guide you through an Introduction to the CAPM Course and CAPM Methodology

**Louis Alderman, Velociteach**

### PM Workshop

#### **Creative Problem Solving: Harvesting Ideas with Creative Thought**

*If you want to attend this half day workshop, select **B23**, then choose your other November 7th workshop*

In today's truly global marketplace, companies that ignore new idea generation and innovation, do so at their own peril. The new "creative class" is rising and it is this class that will begin to forge ahead with bold new ideas, creative solutions to business problems and remarkable innovation. Companies who do not recognize that creative and innovative thinking is a requirement for success in the new world economy will be the dinosaurs of the next business age.

Problem solving, idea generation and creativity are not talents that are specific to project management or business analysis professionals. Instead, "being creative" is a valuable personal skill that directly relates to how successful you are as a person, as a professional, and as a facilitator of project or business needs.

This presentation will help project management and business analysis professionals develop the creative thinking skills demanded by an increasingly competitive marketplace:

- § Problem identification
- § Generation of new ideas
- § Facilitating idea development among team members and stakeholders
- § Maintaining a creative culture in your organization

**Paul R. Williams, PMP, Project Manager, Thrivent Financial**

## Half Day Workshops - continued

### PM Workshop

#### **Process Maps and Use Cases: Using the right tool for the job at hand**

*If you want to attend this half day workshop, select [B24](#), then choose your other November 7th workshop*

Process maps and use cases can be used as complementary business analysis techniques. Depending on how they are used, there can be significant overlap between the two techniques. This workshop will introduce participants to basic process mapping and use case definition techniques.

#### **PM Workshop (continued)**

The boundary concept and how it applies to process mapping and use case definition  
How to draw a process map  
How to define and elaborate a use case  
How to find use cases on process maps  
When to use process maps, when to work with use cases, when to use both techniques.

**Susan Burk, Systems Architect, MassMutual**

**[BACK TO CONTENTS](#)**