

PMOTM

SUMMIT 2008

*Extending the Value & Reach of the PMO While
Leveraging the Power of Social Capital*

December 8-10, 2008 | Coconut Grove, FL

Featuring In-Depth Case Studies and Conversations on:

- Standardizing and introducing economies of repetition in the execution of projects
- Striving for optimized use of resources to keep costs down
- Building strategy and direction by exploring governance challenges and best practices
- Utilizing a broader external knowledge base in managing outsourcing and globalization
- Benefits and challenges of transitioning from a PMO to an EPMO
- Focusing on the "soft skills" of program management such as team-building and leadership development

Hear Fresh Perspectives From:

- Rich Maltzman, PMP, Senior Manager, **Global PMO, Alcatel Lucent**
- Joseph Faga, Director EPMO, **Nationwide Insurance**
- Samantha Dunbar, Managing Director, Head of PMO and Business Governance, **Wachovia Securities**
- Bill Taggart, Former COO, Corporate & Investment Banking, **Wachovia**
- John Roy, Director PMO, **John Hancock Financial Services, Inc.**
- Judy Balaban, PMP, VP Infrastructure Service Management & PMO, **Realogy Corp.**
- Vivian de la Llama, Director, IT Project Management Office, **Burger King Corp.**
- Chris Toomes, Director of Projects, Supply Chain Management, **Memorial Hermann**
- Terrence McArdle, VP PMO, **Sumitomo Mitsui Banking Corporation**
- Mark Scott, Chairman of the Divisional Process Group, RF Communications Division, **Harris Corporation**
- Terry Doerscher, Chief Process Architect, **Planview, Inc.**
- Mark P. Perry, Senior Vice President, **BOT International**
- Lisa DiTullio, Principal, **Lisa DiTullio & Associates**
- Bob Benson, Principal, **The Beta Group**
- John Schlichter, Principal, **OPM Experts LLC**
- Cornelius Fitchner, PMP, **The Project Management PodcastTM**

Learn from Award-Winning PMOs:



Norm Buckwalter,
Director Innovation
and Planning
Department,
**Accident Fund
Insurance Company
of America**
CBP 2008 PMO of the Year



Heidi Boehringer,
Director PMO,
**National Council on
Compensation
Insurance**
*CBP 2008 PMO of the Year
(Finalist)*



Steven J. Kustelski,
PMP, Director PMO,
CPS Energy
*CBP 2008 PMO of the Year
(Finalist)*



Michael Syverson,
Director PMO,
Hewitt Associates
*CBP 2008 PMO of the Year
(Finalist)*



Carrie J. Clark,
Director Enterprise
Project Office, **R.L.
Polk & Co.**
*CBP 2008 PMO of the Year
(Finalist)*

PMOTM

SUMMIT 2008



Dear Colleagues,

At most companies, project management has become an organizational-wide function that has not only saved money and time, but has been helpful in achieving a company's overall business goals. While the intention of a PMO is to add value to the bottom line, often this may go by the wayside because of poorly managed resources, lack of executive buy-in, and changes in technology and global initiatives. IT Management IQ has created a conference that will focus on all Program Management Offices, no matter what the project is. The PMO Summit 2008 is for PMO executives who want to take their program management efforts to the next level... moving beyond a strict focus on technology and accreditation, and effectively incorporating the "soft skills" associated with team-building and leadership development to create a more holistic PMO strategy.

Mark your calendar for December 8-10, 2008!

This year's conference promises to be a networking and discussion-filled event leaving you with new ideas and solutions to take your PMO to the next level.

Respectfully,

Adriana Ariga
Conference Director, IT Management IQ

P.S. Maximize your learning experience with our highly interactive and content-rich pre-conference workshops! See page 5 for details.

Sponsorship and Exhibition Opportunities

Sponsorships and Exhibits are excellent opportunities for your company to showcase its products and services to high-level, targeted decision makers attending PMO Summit 2008. IT Management IQ and the PMO Summit 2008 help companies like yours achieve sales, marketing, and branding objectives by setting aside a limited number of event sponsorships and exhibit spaces – all of which are custom-tailored to help your company create a platform to maximize its exposure at the event.

Visit us on the Web to see what other exciting and information-packed conferences are being offered by the International Quality and Productivity Center! To find out more about this and upcoming events, contact Mario Matulich at 866-232-8660 or via email at sponsorship@iqpc.com.

Who Should Attend:

VPs, Directors, General Manager, Managers of:

- Program Management Office
- Project Management
- Project Portfolio Management
- Business Process Improvement
- Business Analysis
- Product Management
- Information Technology/Systems
- Strategic Planning

Past Attending Companies Include:

- Florida Department of Health
- Pfizer
- Eli Lilly
- Merck & Co. Inc.
- CIGNA
- State Farm Insurance
- Blue Cross Blue Shield
- Commerce Bank
- Wachovia
- Hotels.com
- Ashland Inc.
- Maple Leaf Foods Inc.
- KeySpan
- Verizon
- Dell Inc
- Supervalu Inc.
- Northrop Grumman Corp.

CONFERENCE DAY 1

Tuesday, December 9, 2008



8:30 Networking Breakfast and Registration

9:00 Welcome Address and Opening Remarks from the Chairperson

Cornelius Fitchner, PMP, The Project Management Podcast™

9:15 Building a Winning PMO Team

- Linking ownership of strategic plans to each annual planning process
- Institutionalizing a dual project governance structure through project prioritization & management committee for tactical department project prioritization
- Assigning PMs ownership of initiatives from concept exploration through close out & benefit recognition –regardless of type of project



Norm Buckwalter, Director Innovation and Planning Department, **Accident Fund Insurance Company of America**

10:00 Dropped Calls: Communication and Risk

- Exploring 5 Crucial Conversations™: Why projects fail
- Understanding a projects structure and governance
- Effectively implementing and managing a project steering committee
- Gaining and maintaining executive sponsorship
- Creating a project communication plan
- Back to the future



Steven J. Kustelski, PMP, Director PMO, **CPS Energy**

10:45 Morning Networking and Refreshment Break

11:30 Achieving Executive Buy-In by Building the Business Base for the PMO Function

- Establishing and maintaining executive relationships
- Utilizing metrics to demonstrate the value of PMO to management
- Effective communication between departments and stakeholders
- Aligning your projects to strategic objectives

Samantha Dunbar, Managing Director, Head of PMO and Business Governance, **Wachovia Securities**

Bill Taggart, Former COO, Corporate & Investment Banking, **Wachovia**

12:15 Delivering on the Business Case Promise: Program Design

- Portfolio management: Structuring investment decisions around business drivers and measurable results
- Program management: Linking investment decisions to a natural delivery model
- Program release planning: Setting the delivery model into the organizational, system and environmental context in order to create a planned benefit realization schedule
- Benefit tracking and reporting: Measuring and monitoring benefits earned vs. planned - measuring 'earned value' at the portfolio level



Joseph Faga, PMP, Director IT Management, EPMO, **Nationwide Insurance**



1:00 Networking Luncheon

2:00 The Zen of Aligning Your Project Portfolio to Strategic Objectives

- Balancing the project portfolio with strategic objectives: Art, Religion or Necessity?
- Imbedding Six Sigma into your Systems Development Life Cycle (SDLC)
- Growing a corporate project culture
- Delivering corporate value through project portfolio management
- Collision or Coordination: When resource management meets strategic objectives



Heidi W. Boehringer, Director Program Management Office, **National Council on Compensation Insurance (NCCI)**



2:45 Transformation of the PMO from being a Project Oversight Organization to a Service Delivery Organization

- Transforming the PMO from mainly focused on project management oversight and administration to managing the overall portfolio of project work
- Evolution of the role of the project manager along the transformation
- Effectively communicating and sharing information internationally
- Prioritizing matrix of global projects and resources



Michael Syverson, Director PMO, **Hewitt Associates**

3:30 Networking & Coffee Break

4:15 Panel Discussion: Reviewing the Project Management Institute's Organizational Project Management Maturity Model

- Recognizing areas of strengths and weaknesses and where your organization stands on the continuum of project management maturity
- Evaluating key areas of improvement to take your PMO to the next level
- Identifying steps to improve and achieve business goals

Mark Scott, Chairman of the Divisional Process Group, RF Communications Division, **Harris Corporation**

John Schlichter, President, **OPM Experts LLC**

Mark P. Perry, Senior Vice President, **BOT International**

5:00 Completing the Puzzle - Building a PM Development Framework

- Effectively integrating and merging multiple PMOs
- Understanding the need for an interlocked philosophy of career path, skills management, industry certification, company accreditation, training, recognition, PM Community, and more to accommodate a true development framework
- Analyzing specifics of this model and lessons learned



Richard E Maltzman, PMP, Senior Manager, Global PMO, **Alcatel Lucent**



5:45 Chairperson's Closing Remarks and End of Day One

Cornelius Fitchner, PMP, The Project Management Podcast™

MID-CONFERENCE WORKSHOP

Tuesday, December 9, 2008



6:00pm – 9:00pm (Registration 5:45pm, Dinner included)

D Assessing Your Organization's Project Management Maturity: OPM3 Assessment

An OPM3 assessment is a structured assessment of the way your organization works based on a body of knowledge that has been developed with the input of thousands of professionals. Do you want to identify ways your organization can deliver projects more effectively and efficiently? Do you need to get different people, functions, or departments on the same page, and overcome resource challenges? Experience a simulation of assessing your own organization in this workshop!

What Will Be Covered:

- Creating momentum in organizational improvements
- Creating a maturity assessment "report card"
- Communicating finding to executives
- Institutionalizing metrics

How You Will Benefit:

- Establishing control and optimizing throughput of project to advance strategic intent
 - Transforming the project management culture
 - Implementing governance, policies, processes, and compliance protocols
- John Schlichter**, CEO, **OPM Experts LLC**

CONFERENCE DAY 2

Wednesday, December 10, 2008



8:30 Networking Breakfast and Registration

9:00 Welcome Address and Opening Remarks from the Chairperson

Cornelius Fitchner, PMP, **The Project Management Podcast™**

9:15 PMO 2.0: Redefining the PMO as a Business Management Center of Excellence

- The concepts and forces that are re-shaping the role of the modern PMO in today's technology-driven businesses
- Why just managing the project portfolio is no longer enough
- Identifying key elements for success, including redefining roles, sponsorship, and organizations structure & placement

Terry Doerscher, Chief Process Architect, **Planview, Inc.**

10:00 Leveraging Technology for Efficiently Managing Collections of Corporate Projects

- Choosing and implementing technology solutions at the enterprise level
- Aligning strategies, resources, and funding
- Successfully understanding and managing the lifecycle of a project
- Gathering requirements and identifying vendors

Terrence McArdle, VP PMO, **Sumitomo Mitsui Banking Corporation**

10:45 Morning Networking and Refreshment Break

11:30 Focusing on the Soft Skills of PMO: Change Management

- Focusing on career development, skills management, and recognition
- Grooming managers to become future leaders of the organization
- Developing leadership competencies
- Identifying effective strategies to adapt to culture change

Judy Balaban, PMP, VP Infrastructure Service Management & PMO, **Realogy Corp.**

12:15 A Project Governance Model: Identifying Your Blue Chips & Controlling Your Projects From Initiation to Closure

- Establishing company wide priorities using a Blue/Red/White Chip concept
- Planning out a year's work on the yearly roadmap
- Monitoring project progress using the project dashboard
- Structuring checkpoints throughout the life of the project using the tollgate process



Vivian de la Llama, Director, IT Project Management Office, **Burger King Corp.**



1:00 Networking Luncheon

2:00 What is in Your Communication Toolbox?

- Key techniques you need to communicate to customers, executives, and employees
- Measuring and conveying the progress of your EPO
- Defining what tools are non-negotiable if you want to be an effective project manager



Carrie J. Clark, Director Enterprise Project Office, **R.L. Polk & Co.**

2:45 Project Portfolio Management: Prerequisites, Perks and Pitfalls

- Examining prerequisites of building a project portfolio
- Maintaining and prioritizing a project portfolio
- Utilizing project portfolio management tools
- Maximizing portfolio benefits for the PMO and the entire organization
- Understanding and avoiding common pitfalls associated with project portfolio



John Roy, Director, Fund Administration PMO, **John Hancock Funds**



3:30 Networking & Coffee Break

4:15 The New Project Manager and Their Role in the PMO

- Exploring why and how the role of the project manager is changing
- Understanding and applying the skills for a new project manager
- Discovering the future of project management

Chris Toomes, Director of Projects, Supply Chain Management, **Memorial Hermann**

5:00 Chairperson's Closing Remarks and End of Day Two

Cornelius Fitchner, PMP, **The Project Management Podcast™**

Most excellent! Will definitely utilize some of these topics and ideas

Resurgent Capital Services

Well organized, useful information!

Genetech

PRE-CONFERENCE WORKSHOPS

Thursday, December 11, 2008

9:00am – 12:00pm (Registration 8:30am, Breakfast included)

A Successful IT Governance: Successfully Engaging Every Business Manager in Governance

The hardest challenge facing IT managers is getting the involvement of business managers in IT governance. This difficulty occurs with steering committees, project prioritization, IT financial management, project sponsorship project reviews, PMO management committees -- just about every place where "best practices" requires business manager involvement. It's frustrating when we know that we need engaged business management, but they don't have the time or inclination to participate. This workshop covers the initiatives and frameworks needed to obtain management engagement throughout IT governance.

What Will Be Covered:

- Where business management is needed in IT governance
- How business management can be effectively engaged in PMO, strategic planning, prioritization, and IT Financial management
- Strategy and methods for gaining business management participation
- Case studies in business management engagement
- A thorough diagnostic tool for assessing where your organization is in business engagement in governance
- A benchmarking framework for governance, based on extensive data collection on practices in the US and Europe

How You Will Benefit:

- Learn the successful approaches to business management
- Apply the governance frameworks and methods in case examples
- Understand what has been successful, and the conditions needed for success
- Gain frameworks and diagnostics to understand what will work for you



Bob Benson, Principal, The Beta Group

12:00pm – 3:00pm (Registration 11:30pm, Lunch included)

B Expected Behaviors for Team Performance: Road Rules, Not Road Rage

No project can succeed without a project team. More likely than not, your project will also require a number of participants from different areas within your organization. It's also highly likely you will need to involve parties from external agencies, whether they are consultants or vendors. Regardless of whom and how many you have on your team, you cannot succeed in meeting deliverables and deadlines unless you act as a high functioning team. Focusing on simple techniques to enhance team behavior and group dynamics, this seminar reveals easy-to-adopt practices to enhance team members' awareness and accountability resulting in improved decisions, efficiency, and business results. Session materials include an expected behaviors toolkit and Lisa's book, Simple Solutions: How "Enterprise Project Management" Supported Harvard Pilgrim Health Care's Journey from Near Collapse to #1.

What Will Be Covered:

- Recognize how the "right" set of behaviors can support productive teamwork
- Identify personal attributes and understand how those attributes contribute to, or conflict with, team performance
- Learn how to introduce easy methods to improve team interaction and reduce conflict among team members

How You Will Benefit:

- Understand the value of teamwork and the link to business outcomes
- Appreciate how simple investments in team dynamics hold big returns
- Increase the needed desire to become productive and effective in team settings



Lisa DiTullio, Principal, Lisa DiTullio & Associates

3:00pm – 6:00pm (Registration 2:30pm)

C Business vs. Theory Driven PMOs: The Five Dimensions of the Modern PMO

Today's business executives are no longer content with PMO approaches that take too long to get going and that are more aligned to the "project management community" of thought than they are to the needs of the business for which the PMO exists to serve. This workshop session will present the emerging trend of PMOs that is characterized by a practical business driven approach as opposed to the many theory driven approaches that are quickly becoming obsolete.

What Will Be Covered:

- Discover the five dimensions of the "Modern PMO"
- Effectively employ PMO architecture and PMO tools
- Learn strategies for measuring the PMO

How You Will Benefit:

- Explore current trends in PMO strategy
- Recognizing business driven PMO strategies and theory driven pitfalls
- Acquiring knowledge helpful to establishing and advancing the PMO



Mark P. Perry, Senior VP, BOT International

REGISTRATION INFORMATION

PRICING	Register and Pay By 10/10/08	Register and Pay By 11/7/08	Standard Pricing
Conference Only	(save \$600) \$1,899	(save \$200) \$2,299	\$2,499
Conference + 1 Workshop	(save \$600) \$2,498	(save \$200) \$2,898	\$3,098
Conference + 2 Workshops	(save \$600) \$3,047	(save \$200) \$3,447	\$3,647
Conference + 3 Workshops	(save \$700) \$3,496	(save \$300) \$3,896	(save \$100) \$4,096
Conference + 4 Workshops	(save \$800) \$3,945	(save \$400) \$4,345	(save \$200) \$4,545
Workshops Only	\$549 each	\$549 each	\$549 each

Please note that multiple discounts cannot be combined.

A \$99 processing charge will be assessed to all registrations not accompanied by credit card payment at the time of registration.

MAKE CHECKS PAYABLE IN U.S. DOLLARS TO: IQPC

* CT residents or people employed in the state of CT must add 6% sales tax.

TEAM DISCOUNTS

For information on team discounts, please contact IQPC Customer Service at 1-800-882-8684. Only one discount may be applied per registrant.

Special Discounts Available: A limited number of discounts are available for the non-profit sector, government organizations and academia. For more information, please contact customer service at 1-800-882-8684.

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Reference: Please include the name of the attendee(s) and the event number: 10922.003

Payment Policy: Payment is due in full at the time of registration and includes lunches, refreshment and detailed conference materials. Your registration will not be confirmed until payment is received and may be subject to cancellation. **For IQPC's Cancellation, Postponement and Substitution Policy, please visit www.iqpc.com/cancellation**

Note: Contact hotel for direction and transportation suggestions.

Special Dietary Needs: If you have a dietary restriction, please contact Customer Service at 1-800-882-8684 to discuss your specific needs.

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REGISTRATION CARD

YES! Please register me for

PMO SUMMIT 2008™

- Conference + 1 Workshop
- Conference + 2 Workshops
- Conference + 3 Workshops
- Conference + 4 Workshops
- Conference Only

See Page 5 for pricing details.

Your customer registration code is:

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Approving Manager _____

Address _____

City _____ State _____ Zip _____

Phone _____ Fax _____

E-mail _____

- Please keep me informed via email about this and other related events.
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- I cannot attend, but please keep me informed of all future events.

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- 4 **Fax:** 1-646-378-6025
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Register by 10/10/08 and SAVE \$800

PMO SUMMIT 2008™

Extending the Value & Reach of the PMO While Leveraging the Power of Social Capital

December 8-10, 2008 | Coconut Grove, FL

Featuring In-Depth Case Studies and Conversations on:

- Standardizing and introducing economies of repetition in the execution of projects
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- Utilizing a broader external knowledge base in managing outsourcing and globalization
- Benefits and challenges of transitioning from a PMO to an EPMO
- Focusing on the "soft skills" of program management such as team-building and leadership development



IQPC has been reviewed and approved as a provider of project management training by the Project Management Institute (PMI). As a PMI Registered Education Provider (R.E.P.), International Quality & Productivity Center has agreed to abide by PMI established quality assurance criteria.