PSM 2010 Workshop

16 July 2008 Mystic Connecticut

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Background Jack McGarry

PSM ten years doing this.
Don't you think we should be having more impact than we have?

Still going to programs and projects. Still too low level. How to measure etc.

Not doing high level assessment stuff.
How to get people to use, ake decisions this stuff?

Last year's conf: brainstorming workshop.
December meeting 8 people there 8 on phone.

Today: putting out ideas based on the above.
Contributory, collaborative effort – like original PSM develpt.
Owners, primary sponsors involved etc.
Good synthesis of what works.

About time we do some thongs with PSM.

Scope.
Fundamental msmt process, practices.
'Let's put msmt into practice' – first vision.

Scope expansion. New things

Question: what makes sense based on our experience?

Tougher questions now.
Envts, behaviors.
No invention of wheels.

How can we make msmt more of an influencing factor?
Very hard to do.

Get some things on the table today.

Envt has changed.

The Principles
Single project assumed, but now times have changed.

Tim: DOD mandated EVM – but still not there.

How can I ensure I get traction?

Tim: Mngt will still make decisions their way. Question for us - how can I get msmt in front of mngt periodically?

Jack McG: 50 programs study. Data.

Choke on data first time thru.
Yet, when managers will tend to say is 'it can't happen here.'

If we can't understand how managers make decisions, there must be something we don't know about.

Behavioral problem: but are there things we can do to alleviate problems?

Education of the decision makers is probably in scope.

DMs use a myriad of information. Opinions, Read, TV, paper. Multiple sources.
We have to compete with all that.

Managers saying 'bring me some data'. There do seem to be ways to influence.

Objective of PSM – make a little bit of difference. Start to give legitimacy to all this.

All comes from practitioners - not the college guys.
Virginia Tech – 11 page definition of an indicator.

International folks have different needs.

We never expected to see intl folks – book in several languages.

Market there - part of the project.

Telcons, send comments in etc. Welcome.

Rita C: Modernising the web presence.

Objectives of the Workshop

PSM Vision
To be the primary global resource used by projects and enterprises to implement a measurement-based decision discipline that drives performance optimization and improvement.

Project – aligned with the authority of a DM.
Enterprise – multiple DMs plus a global DM. Multiple diverse projects – but need to make decisions across multiple projects.

Discussion of vision statement.

Issue: does the wording imply criticism of current senior DM practices? 'To aid DM by projects and enterprises' to drive performance.

Measurement-informed
Cheryl invites new comments, additions etc.

Issue: Drives what – performance improvement.

Issue: to be – does this imply we haven't achieved this? Legacy?

Other orgs could make a claim for this e.g. PMI.

Enterprise – more functional orientation, or structural organization.

Performance Results

PSM Customer Base

Etc.

Advanced Msmt Techniques

Foundational tech models - currently three

- Process model

- Msmt Info model
- Inter-relationship model

What are the basics? How does it look in an organization setting?
Count money? People mngt? Etc.

Do we need to expand guidance?

Project to enterprise perf analysis? What do we need to add to the guidance?

Trend is to move from activity measures to outcome measures. More sophisticated measures. Performance – related msmt. How to set the expectations – the baselines?

PSM Principles

PSM Objectives and Scope

Draw scope around the customer – who are we serving. Match the information provision to the customer. Provide benefit.

PSM Vision

User base

Projects to enterprise.
Baselining, performance

Members to propose alternative wording.

Scope

PSM Tasks The WBS for PSM

Proj Mngt
Tech Devlpt and integration
Development of Guidance, products
Transition

Proposed new model – behavioral model

Marketing to be drawn out at top level?

'Marketing and Transition'

Application Scope

Project, Enterprise
Govt DOD Industry Intl Academia

Intl – take up in India, China

PSM is a pre-cursor to 6 sigma etc.

Analysis requires good data – PSM can develop this.

Focus Areas
Proj mngt
Process Impvt
Perf Analysis
Governance
Engineering Management
Engineering Capability and Management

Build interfaces into lean six sigma,
Relationships with other disciplines
BSC CMMI M&A, ISO, PMI other professional organizations

Different degrees of interface. API – type interface.
Foundations for this.

How do we define a relationship with something new? So we don't have to re-invent each time. So we don't lag behind.

Mapping between PSM, CMMI. Already mapped through M&A PA.

Performance analysis
No-one has agreement on what **performance** means. Relative. Trend measures. Strategic plan. What do we measure against?
Benchmarking.

Decision-making – separate focus area? Maybe not a separate focus area.
Decision model – overarching title.
Bob Charette contributed to components of this.

Outcome or output? Output usually a product. Outcome – impact on mission

What is Governance?
Cost accounting community – following Enron. Sarbanes Oxley etc. Track what you're claiming through IT systems. Rigor.
'I wrote the law, now we're watching.' Fact-based monitoring of outcomes and how you got there.

The CIO now responsible for integrity of IT systems, now also responsible for data in the system.

Data security – health records.
Should we address this? Big market.

IT Governance, ITIL.
Look at and re-visit.

Valid data in msmt. Are we going to ensure that data is valid?
What's the intersection with governance, and system and sw engineering? What's protected, sharable etc. To investigate further.

Decision areas

End Users
Decision makers up to CIO CEO added.

Technical Domains

SW SW-intensive systems domain.

Potential scope of tech domain
Services, SOS, Agile
SOA
BSC
OO Design
Safety and Security

Agile – potential white paper.

Sophistication

Analysis techniques

Fundamental Stuff – applies all the time

Generic stuff anyone can use.
Focus – more user-based stuff.

Developing materials for msmt experts or for end users?
Msmt – gopher guidance on products for end users.

Measurement 'middleman' assumed.

Sophistication - looking at users or middleman?

Technical Currency.
e.g. SLOC versus current approach.
Now – lots of different types of systems.

What are the up and coming technologies?
Development of measures in new technologies. Technology

Services.

Strategies and objectives

PSM Initiative
Foundational Models
Analysis Model
Behavioral Models – can we be objective in this domain?

Behavioral - not well define att the moment.

Look at options put to a DM. Is there something we can put on the table to help?

Analysis model – causal relationships.

Should there be an explicit integrated model?

External influences and decision choices, constraints. 'Decision freedom model'.

How much to include pure behavioral stuff?

Look at these factors on the outside/ on the inside etc.
Maybe just a checklist.

Key Constructs

ICM Table: Revisit basic table.
Seven Info categories etc.

What do we do in PSM?
Develop models and techniques.
Research etc.

How do we connect the technology to users – novice measurers.
Information need – Measurable Concept, Measure.
Measurement Information Model.

Measurement Specifications.

Link between tech and practical application.

Implemented in books, tools, example sets.
Transition products.

Tools provided. Simplified. Questions – to measures.
Feedback.

Volatility.
Wiki based approach?

Sample spec libraries.
Others proposed – buyer beware etc.

Reduce cycle time.

Other specializations. White Paper areas.

Services, agile, SOS,
Strategy. Are there other ways of getting stuff out there?

What is the mechanism for communication?

Here is a general strategy to develop measures in your domain?
Joint developments.

List of important areas etc.

Measurement specifications
Gruesome.
Can it be simplified?

Need more samples.

Synching versions of specs, ICM etc.

Impact and value added. What's the ROI of msmt? Msmt evaluation etc. Qualitative things also. Need to address.

Value obtained from the decision that msmt supported. Each measure should show some return – more on an aggregated basis.

Three measures invested in – return on these. Then, when this is shown, how to get investment on next measures.

Impact of measurement program - and of each measure. Trade-off which measures. Measurement information. Where to place measures to get optimum bang for buck?

PSM Materials

Guidance
Update Guidance 4.0
Update Book 2002

Format?

Case Studies
Training Book

Update Case Studies

Add more difficult items into case study.

PSM – strategic planning envt: need for case studies.

Do we need a group to think about overall structure. How to develop a mstm infrastructure?

What are the materials you use mostly? That we would use tomorrow?
In our real jobs.

What do we need to teach this? At DAU?

Materials more hyperlinked etc. Video game?

Leading indicators to be prioritised when we have limited resources. What are the best measures to start with?
Standard WBS for PSM implementation. Quick start guide. Exec Summ.

Patterns of measurement. Measures that go together nicely. If you have this set of information needs – here is what you do.

Which of these will get us to the PSM vision sooner?
Sponsorship.
Author, revew.

What people are willing to work indicates what works. Concentrated effort.

Appeal to different audiences.
Msmt community.
Executives, Govt.

Training.
Update materials.
Training update – scope expanding.
On-line training. For DAU.
Executive training, not msmt geeks.

Measures – what does it buy you?

Proposal: Professional certification
People can say they are certified.
Training and testing.

Module training.
10 -15 min training courses.

INSIGHT
Synch with the book etc, guidance.
Current technology updated the engine.
Do we need to maintain at all?

Measurement Tools.
Excel spreadsheets. Input, output.
Tailorable. Graph-enabled.

Sponsorship. Multiple sponsors. 20k each etc.

Implementation aids.
Open exchange area.
Templates, processes, process descriptions.
Freely given freely used.

Explaining how to build an ICM for different domains. Practical measurement model.
Not sw.

Revised 15939 – no longer says sw.

Tailoring Guidance for specifications

Information product structure – e.g. Jeff Allen remplate for Analysis and Action.

Template – measurement process procedure (Jeff Allen has LM procedure for getting from goals to info needs etc).

Transition Strategy

Project Management

Money, effort.
What are we willing to contribute to the project?

Review of material.
Comments invited. Two-week.
Completed list – and prioritisation.
Top ten. Etc.
Bottom five.

Contribution.

Consider White Paper writing: do we want to do these? Work involved in updating everything.

Need more hands and more money. Certification – gets more hands.

US Defense mainly. OSD. Army. Navy. FAA.

Business Model of PSM.
Qualified instructors. Qualified trainees.

Accept any inputs by Wed 23rd July.
Incorporate. Cheryl to send out on 23rd.
Wider comments by 15th August.

Using this contact list.

Close 17:00