



Established 1986

PO BOX 984, BOWLING GREEN, NEW YORK, NY 10274. 1-877-659-4309

**Data
Management
Association**

**Visit us at:
www.dama-ny.com**

News Letter

February 2007

DAMA NY OFFICERS

Denis Kosar
President

Beth Ouellette
VP, Marketing

Sam Patel
Program Chair

Stu Rosenthal
Membership Chair

Patricia Komar
Treasurer, VP Finance

Chhaya Kapadia
Chapter Secretary

Ho-Chun Ho
News Letter Editor

Jae Cha
VP On-Line Services

Toshu Kabessu
VP Special Events



Mark your calendars for: **Thursday, February 15, 2007**

**Enterprise Data Governance and Data
Stewardship**

Anne Marie Smith
EWSolutions

**Location: Computer Associates
520 Madison Avenue, 22nd floor, New
York City, New York**

*Please note that the location has changed. It
is between 53rd and 54th street.*

CONTENTS

Next Meeting- January 18	1
Presentation Abstract	2
Feature Article	3 - 10
Member Discounts	11
Patrons of DAMA NY	12 - 13

AGENDA:

8:30 am - 9:00 am	Registration
9:00 am - 10:00 am	Anne Marie Smith
10:00 am - 10:15 am	Coffee & Refreshments
10:15 am - 11:45 am	Anne Marie Smith
8:30 am - 9:00 am	Registration

**To register just go to our website at
[http://www.dama-ny.com!](http://www.dama-ny.com)**

Presentation Abstract

Data and information are critical components of business, and should be considered as valuable a resource as buildings, employees, products. If a company desires a competitive advantage, it should focus on managing and using its data effectively. Data Stewardship and the governance of the data/information assets is an essential part of any information systems strategy for the 21st century. Data governance and stewardship can serve as part of an enterprise effort to develop improved information management for any organization.

This presentation will offer a methodology for creating and implementing a data governance program, based upon actual experiences of the presenter at several companies and from research into the concepts of stewardship, governance and data management. The attendee will gain an understanding of the importance of data governance, the various types of information management approaches, the data steward's role in the data-information-knowledge continuum, and a plan for developing their own governance and stewardship program.

Topics:

- Information as a Corporate Asset, Management of Data and Information
- Master Data Management and Governance
- Objectives and Functions
- Roles in Master Data Management and Governance
- Introduction to Data Governance and Stewardship
- Implementing a Data Stewardship Program
- Conclusion, Questions and Answers

Feature Article

Communication and Virtual Teams – “Excuse me, what did you say?!”

By Beth Ouellette 

"The most important thing in communication is to hear what isn't being said."
-- Peter F. Drucker

Background Information

Since early 2003, I was part of the Portfolio and Program Management Standard (PPMS) Team for the newly released PMI standards. Though I started as team member, within a few months, I was asked to take a lead role in the architecture group with a focus on the Portfolio processes. Then a few months later was asked to lead the entire Portfolio Team. I took on this honor and responsibility with the partnership of Claude Emond, my ally from Montreal. As we took this journey together we learned many things about management, people, and particularly remote or virtual communications. What follows is a result of our experiences and education on the PPMS team.

Virtual teams – not a choice, but a norm

There was a time when having an entire team co-located was the norm; it was just the way things were. All the members of the team were at the same address, and usually on the same floor of the building, and often in the same area of the floor. Meetings were actual, physical meetings in the same room – a face-to-face event. As Peter Drucker denotes, it was much easier to “hear what isn’t being said” in those days. We could see reactions, gestures, and physical feedback. Today the use of virtual teams is the norm, and the converse is true; it is unusual that teams are located in the same city and state, much less the same floor or area of the building. Thus, it is much tougher to “hear what isn’t being said.”

There are many reasons why virtual teams are used. Here are some of these reasons:

- The best team members may be located in dispersed geographical regions.
- The commutation time and travel time for face-to-face meetings can be used more productively, given today’s level of technological sophistication.
- Flexible organizations may be viewed as more responsive to both their workforce and the marketplace.
- The team members may need personal flexibility.
- The global workday is 24 hours, not just 8 or 10 hours.
- Our society is shifting from operation and production environments to more of a service and knowledge work environment.

So if we want the best and brightest, and we want the most productive possible environment, a work environment that will yield an excellent product, as well as be envied and desirable, the virtual team is a de facto standard.

Okay, this sounds nice, even reasonable. So what? We hear these arguments all

the time, we use them all the time, we make assumptions of what others are meaning when they use terms like *team*, *virtual team* and *communications*, and we make assumptions of others' understanding when we use these terms. So, just to clarify, let's start out by defining the terms that have already been used: *communication*, *team*, and *virtual teams*.

We searched YourDictionary.com, Webster.com, [Wisdom of Teams](#), [Creating the High-Performance Organization](#), by Jon R. Kazenbach and Douglas K. Smith, and Encyclopedia.TheFreeDictionary.com to find the following definitions.

com-mu-ni-ca-tion

1. The act of communicating; transmission.
2. **a.** The exchange of thoughts, messages, or information, as by speech, signals, writing, or behavior.
b. Interpersonal rapport.

com-mu-ni-ca-tion

- 1 : an act or instance of transmitting
- 2 **a** : information communicated **b** : a verbal or written message
- 3 **a** : a process by which information is exchanged between individuals through a common system of symbols, signs, or behavior

Team - A team is a small number of people with complementary skills who are committed to a common purpose, performance goals, and approach for which they hold themselves mutually accountable.

A **Virtual Team** — also known as a [Geographically Dispersed Team](#) (GDT) — is a group of individuals who work across time, space, and organizational boundaries with links strengthened by webs of communication technology.

It seems interesting that in the definition of virtual team the true meaning of team is lost. Team was a number of people working together toward a common goal or purpose. The definition of virtual team is defined as simply a group working across time, space, boundaries using technology for communications. To be more effective with virtual teams, we must get the team element back, and include it in the definition, so that our virtual team definition is more like the following:

Virtual Team – a group of people with complimentary skills, working toward a common purpose, goal, and approach, for which they hold themselves mutually accountable, while working across time, space and organizational boundaries, utilizing technology to strengthen communication.

It is this definition we set as our goal, and this is the foundation on which this article is written.

Application of virtual teams

We use virtual teams in projects, organizations, personal life, pro-bono work, and collaborative community work. At times it is used simply because of the technology available. We have full-time students who never see the inside of an instructional institution. We have customers who only use the internet to communicate with us, and others we have never met, but the voice on the phone is our link into the customer. We have volunteer organizations, such as the PMI Program and Portfolio Management Standard team (PPMS), which draws the best and brightest from across the Americas, Europe, Asia, Africa and Australia. (I have yet to been exposed to virtual team members from

Antarctica.) Virtual teams are a way of life; it is just one way we do business and leverage the talent throughout the project with the use of technology to accomplish the goals of the group. Another term sometimes used is *Networked Teams*. Networked teams consist of individuals who collaborate to achieve a common goal or purpose; its membership is frequently dispersed and fluid.

Communications within virtual teams means that we share information with others through speech, writing, behavior, tone, and technology among and between individuals working in a group, across time, space, and organizational boundaries. Many of us have done this for years, and it has just become a noticeable, critical part of how we conduct business. We have used this type of team and interactions, yet the significance of its efficiencies is only beginning to be realized.

Foundation elements

Now that we have a common understanding of why we use virtual teams, what they are, and that it is not a choice any more, let's look into the foundation elements of having successful communications on virtual teams.

For the past two years, I was co-leading the team for the PMI Portfolio Management Standard, and the entire team was remote or virtual. It was months before we met face-to-face. In this case we were volunteers from around the globe with common interests and common goals. Our perspectives and experiences were diverse, which in the end served us well. The following foundation elements were critical to the success of our Portfolio Management Standard team and will apply to most virtual teams as well.

A Common starting point

The team should be created so that it has complimentary skills and a common vision, mission, and objectives for its purpose. There must be common goals, as well as inter-related and interdependent work products. To reach this point successfully, there must be a shared methodology and approach to engage in project activities. The work ethic must be consistent, and the work product must be one in which the team will take personal initiative toward, and personal pride in its end results.

If all of these things are in sync, we are well on our way to a successful project outcome. If these things are not in sync, then why would a team with so many other challenges even make an effort or exist? While you think about that, let's move on.

Project charter

We have heard a thousand times, "If it doesn't have a Charter, then it isn't a project." We answered this and related questions right on the PMP Exam. We know the phrase. We know it is valuable and powerful for a project; we know it makes sense. Yet it seems that many projects up and running today do not have a charter.

When we kicked off the PMI Portfolio Management Standard team, we were given a charter by PMI. It outlined the goals, objectives, milestones, constraints, assumptions, and named the project manager of the joint Program

and Portfolio Management Standards team, affectionately called PPMS. So this was our starting point. It was a great way to focus on the content, establish project boundaries, regroup if we got off the path, and obtain sponsor input when appropriate.

Clear understanding of roles and responsibilities

I know you're saying of course we have this! Yet, we don't work as a cohesive unit in traditional teams. Well on virtual teams it is even more vital. You may not ever see the people on your teams, so be sure that they all know their role, each other's role, and how their roles interrelate. Discuss the roles and responsibilities, discuss their interactions, and put it in writing in the project information library. Make sure that all team members can reference this when needed.

As we started off the PPMS teams, we asked for individuals to step up to take on work as they were interested and able. At the beginning, only the high-level roles were defined, such as the leaders of the Program and Portfolio process and governance teams. As the project progressed, these areas of responsibility were "progressively elaborated" and additional needs, and thus roles evolved. Initially we had an overall Portfolio Management leader, and then two other team leads: one for process and one for governance. From this emerged roles such as chapter leads and workers, appendix lead and workers, editors, project schedulers, etc. As the work continued to be decomposed, and the need for new roles arose, we made assignments (as people raised their hands) and informed, communicated to the rest of the team the new organizational responsibilities and relationships.

Get those work packages created ASAP

I hope this is sounding familiar to you PMP certified and experienced PMs, because it is all "stuff" that should be done in ANY project. AND it is even more vital to be crystal clear on these points in a virtual team. Know what needs to be done, how it relates to the other pieces of the project, and who is going to do it. So just like you have been taught from formal training and have done on the job, the work breakdown structure, how it is built and communicated are quite critical to the success of the project and building a cohesive team.

As the work was detailed out from the objectives and goals on the PPMS team, we were able to identify phases of the project, then logical "chunks of work," and then the individual work packages. We call this decomposition and progressive elaboration in PM speak ;). Once these "chunks of work" were clear, we asked for people to sign-up and take ownership of each area. There was a natural consolidation of work packages, which tied nicely to the outline required by PMI. (Makes sense, since we decomposed, and progressively elaborated, right!) Where appropriate, we asked for and assigned leaders to each of the related pieces of work.

So now with the PPMS, we had the charter, the roles and responsibilities, the phases of the project, the work packages and assignments, and approximate time frames for doing the work identified in the work packages. Now we just needed to do the work.

Challenges of Virtual Teams

There are many challenges facing any project team today. Proper and timely communications; getting the right funding, schedule, and scope understanding; quality and risk management, customer satisfaction, right resources, and management support, just to name a few. When the team is totally virtual, they face all of the same challenges. In addition, they face three challenges specific to virtual teams that are detailed below.

Geographical dispersion

When your project team is located across the globe, it is a challenge to find one single time to hold team or status meetings. The time zones are all over the place. Let's say we have a team in Madras, New York, Los Angeles, and Tokyo. It is 5 PM in New York, which means it is 2 PM in LA, and 6 AM in Tokyo – this is doable for a conf call. Oh, we forgot Madras, where it is 2:30 AM. So let's set up the team conf call for 7 AM in Madras, which makes it 10:30 AM in Tokyo, 9:30 PM in NYC, and 6:30 PM in LA. That seems more doable. At least until you hear that you have a new team member in London where it is 2:30 AM for our team conf call. You get the idea. It is a challenge simply to coordinate reasonable schedules. What we have found is that international team member doing business with dispersed geographical locations are more flexible and willing to get on a 5 AM conf call.

For the purpose of the PPMS team, we held multiple conference calls, early and late in the US time zones, and used other electronic means to communicate, such as email and a shared web portal. Please note that it only worked because all the members of the team wanted it to work. Everyone had to give a little to solve this challenge.

Multi-Culture influence

Listed above were some of the possible geographical locations of our team members, which means we are leveraging expertise on our team from as many different cultures as locations. One of the most important keys to a successful team is the camaraderie that is imbued among its participants. This is a real challenge when we are working across cultures. Our accents are different; our perspectives differ; our experiences differ, etc. Thus special care should be taken to bridge this gap in any way possible.

With the PPMS team we had people from India, England, Canada, and US. It was often challenging just to understand each other with the multiple US English accents (southern, mid-west, and northeast), Canadian English and French accents, British accents, Indian accents, etc. Couple this with the experiences and perspectives, and the diversity quotient grew exponentially. Remember the communications formula? $N(N-1)/2$ I believe given these additional variables that "N" can double or triple given the geographical and cultural issues. So if there are 5 people on the line, according to the formula, we have 10 communication channels. With the multi-cultural and diversity variables added, we could be up to as many as 45-105 communication channels! We must manage "on purpose" and with great care.

Technology capability

The team must have the proper technological access and support. Virtual teams use conference calls, web portals, email, repositories, video conferencing, and instant messaging to stay connected. A study by The Society for Information

Management¹ reported that nearly 90% of all virtual teams use teleconferencing and over 80% use some type of virtual workspace or repository while web conferencing was used approximately 45% and video conferencing used 35% of the time. This study believes that the most beneficial was a combination of the teleconferencing and virtual workspace/repository. One caveat is that the technology must be of good quality, or half of the meeting (or more) will be spent repeating what was said. Remember that the communications formula is more complex with multi-cultural teams, and quality telecommunications technology will help to improve these multi-site, cross-border meetings.

Like the statistics show, the PPMS team used primarily the teleconferencing coupled with the common shared workspace/repository. As iterations of the standard were detailed and progressively elaborated, it was key that this shared workspace could handle version control, feedback loops, and over all communications on the project progress, status, plans, etc.

Tactics for good communications for virtual teams

So where can you get started toward improving communications on your virtual teams? Following are things that worked for us on the PPMS team. They may also be appropriate for your virtual team's use. So take the ones that will give you the most benefit. Apply the Pareto Principle, and pick the 20% that will yield you 80% of the results.

The goals of the group are key

Stephen Covey tells us to "begin with the end in mind."² This is sound advice, especially on a virtual team. Since a virtual team is a group that is brought together for a united goal, that goal should be clearly articulated and then constantly revisited to ensure that the work products of the group link directly back to this overarching goal. This is where the charter becomes the spring board from which everything else in the project is done. So we know where we are headed, from when the objectives are solidified and scope is detailed, it will be these common goals that will continue to drive the direction of the team throughout the entire project life cycle.

Organization of the group matters

Who is the leader of the group, how do they interrelate to the others? Who is in charge of what, who makes the call if there is a decision point, how do the other members of the team step up and take on work, how is the work divided and assigned? How is the team sectioned as appropriate for the work? These aspects were discussed earlier, and it was so critical to our PPMS rules of engagement.

Modes of communication

THE most vital springboard into a successful virtual team, is an *initial face-to-face meeting*. This cannot be under estimated. It is a critical "make or break" event. Face-to-face meetings should be periodic throughout the project, as this will continue to build teamwork and add value throughout the life of the project. Every six months is a good heuristic for timing of these meetings.

¹ Majchrzak, Ann, Arvind Malhotra, Jeffery Stamps, and Jessica Lipnack. "Can Absence Make a Team Grow Stronger?" Harvard Business Review, May 2004

² The 7 Habbits of Highly Effective People, Stephen Covey, 1989, p 95.

Communicating with all team members as *early* as possible in the project and as *often* as appropriate will set a good foundation of understanding for the team.

Many other modes of communication may be effectively used on virtual teams. One that bubbles up and is used quite frequently is email. Be careful here as email is easy to *over use*. Email can be effective for meeting notices, high-level communications, meeting minutes, and occasionally to share documents. Teleconferences are an excellent medium for ongoing communications for things such as planning, status meetings, risk meetings, etc. Use of the team portal or repository is also valuable for sharing documents and work products.

A word of caution – if the portal or web-based repository is not capable of effectively handling and updating documents with a strong version control and collaborative environment, the fall back is always email with huge attachments. Email is in most people's comfort zone, and they will resort to it when the portal is not working as needed, desired, or expected.

Rules of engagement help.

Knowing how the team will work, when the meetings will take place, what the deliverables should look like, and how the team needs to interact with each other and how the decisions will be made along the way. There should be a roadmap to the project's success that each member is aware of, understands the progress, understands their position on the map, and syncs up with the others. Milestones and check points along the way are critical to success.

When dealing with diverse cultures basic ground rules are required. Rules as simple as "yes" means "yes," and "no" means "no," and it is okay to say "I do not know." On conference calls, it seems companies have people in the same building on the same conference call – and rather than go to the conference room to sit together, they stay at their desks and call in. This way they can "multi-task" during the call. *Translation: They can check email, and focus on other work, and "check-out" of the conference call.* THEN they all wonder why the meetings are non-productive, people are unprepared, things need to be repeated several times. Hello, does anyone see that this is not the proper focus and respect in these kinds of meetings?! Agree to be in the same room if in the same geographical location. This will help the meetings be more focused, productive, and efficient. It will also build unity in the team. Try it for a few weeks, and see what happens!

Strong leadership

The leader must be an excellent communicator, experienced and knowledgeable, and able to cull-out talent for the lead positions on the project. The leadership needs to know the team members better than anyone, and know where the skills and strengths lie. The leadership must ensure effective, timely, accurate communications to the senior stakeholders, as well as all project members. This is the glue that holds all of the other areas together. It is the leadership that will take charge with regard to conflict resolution, prioritization, collaboration, decision-making, and performance management. When we realize that the majority of this role is about communication, and take it seriously, this is what keeps the team on track, and ensures positive progress toward the project goals and ultimate success of the project.

Summary

As you can see there is a lot to think about when working in virtual teams. Each of these things inter-relates and contributes to the success of the overall project. It is important to recognize and leverage the differences, which in the end serve to lend valuable perspectives, insights, and project deliverables. I leave you with the following critical success factors of the virtual teams. Use them as you are able and know that effective communication throughout is the foundational element that will be essential for the team.

- ONE common goal, supported by specific, related objectives all included in a written Project Charter.
- Strong leadership and project management.
 - Leaders set high performance expectations; model behaviors such as working across boundaries and using technology effectively.
 - Team leaders and members exhibit competence in working in virtual environments.
- Subject Matter Experts are assigned to the team as appropriate. (This is why we are using a virtual team in the first place!)
- A "high trust" culture; teamwork and collaboration are the norm. To this effect, setting face-to-face meetings whenever possible, with an initial one early in the project is the best way to develop this culture.
- Whether you are currently participating in a virtual team or are planning for this in the near future, plan your communication strategies with these fundamental elements, an understanding of the challenges you will face, and an eye toward the success factors that will enable accurate and effective communications throughout your team.
- And last, remember the tips noted throughout this article that will contribute toward your virtual team's success:
 - Hold an initial face-to-face startup meeting
 - Communicate early in the project to all team members
 - Communicate as often as appropriate for the varying roles and responsibilities
 - Have periodic face-to-face meetings, especially to resolve conflict and maintain team cohesiveness
 - Establish a clear code of conduct or set of norms and protocols for behavior
 - Use visuals in communications – leveraging quality technology to do so
 - Recognize that most communications will be non-verbal -- use caution in tone and language
 - Maintain the focus on the goals of the project
 - Get to know the other team members
 - Have fun!

Special thanks goes out to Claude Emond, my partner in crime and co leader of the Portfolio Management Standard team. And many thanks to The Ouellette Group's April-May Student Body for their validation and insights into day-to-day workings of virtual teams and contribution to this article. Thanks also to Jerry Manas who introduced me to Zózimo, MundoPM, and my Brazilian friends – I hope to meet you all soon!

DAMA NY Member Services and Discounts

PMP Certification Program

The Project Management Professional (PMP) Certificate Program is a PMBOK approach to Project Management Certification (35 hour program over 5 weeks). Though the number one objective is to obtain the PMP certification, the participants will gain knowledge, tools, tricks and processes to improve the day-to-day management of tasks, projects, programs, and even organizations.

Contact training@OuelletteGroup.com for more information.

Detailed information is available on <http://www.OuelletteGroup.com>.

Morgan Kaufmann Publishers

20% discounts in books in their data management line. Please use discount code 50MKP when ordering.

Please visit <http://www.mkp.com/datamanagement>.

Meta-Data Professional Organization

The Metadata Professional Organization (MPO) is a newly formed non profit group dedicated to providing a forum where organizations and individuals can find assistance in addressing their metadata issues and strategies, be advised and informed of developments in the field, and share experiences with other practitioners.

Improving Decision Making When Considering a Repository Solution-Teleconference

DATE: January 4, 2007 EST

TIME: 3:00-4:15 pm EST

TOPIC: How to Improve Decision Making When Considering Repository Solutions - Rapid Repository Prototyping

PRESENTER: Peter Aiken, Founder, [Data Blue Print](http://www.datablueprint.com).

For further information please write membership@metadataprofessional.org.

DebTech International and Wilshire Conferences

DebTech International, L.L.C. is a training and development company specializing in corporate onsite and public IT and data management education. DAMA members may attend DebTech events at a discounted rate.

For additional information please email davida@debtechint.com or call (973) 379-7212.

PATRONS of DAMA-NY

We wish to thank the organizations listed below for their support!



InfoModel, Inc.

***The Leader in Database and Data
Warehouse
Training and Solutions***

Tom Haughey

201 337 9094, email: thaug@attglobal.net



Computer Associates

Acclaimed business software portfolio for:
*enterprise management, security, storage,
business transformation and integration,
portal and knowledge management, and
predictive analysis*

www.ca.com

Michelle Accardi

Michelle.Accardi@ca.com

Tel: 631-342-4236



Syscore Solutions International

***The Leader in providing Information
Management, Data Warehouse, Middleware
Architecture and
Business Solutions***

Bruce Gallager, Fax 212-292-5093

Email: BruceG@Syscore.com



*Business Objects is the world's leading business
intelligence (BI) software company. With more than
30,000 customers worldwide, including over 80
percent of the Fortune 500, Business Objects helps
organizations gain insight into their business,
improve decision making, and optimize enterprise
performance. With its recent acquisition of
FirstLogic, Business Objects now also provides
proven data quality solutions for data integration,
BI, enterprise applications, and source systems.*

George Major

Field Sales

Tel: +1.860.693.6768

george.major@businessobjects.com



Siperian
***Uniting Customer Data with Business
Processes.***

Gregg Loos

Director of Sales

Tel: (917) 533-3640

GLoos@Siperian.com

DebTech International L.L.C.

Education By Industry Leaders
*Seminars and Conferences for
Information Management Professionals*

<http://www.debtechint.com>

David Berger (973) 379-7212

info@debtechint.com



GoldenSource

GoldenSource is a proven software solution based on the industry's most comprehensive global financial data model incorporating over \$150M in research and development and the company's 20 years of **experience**.

Joseph Cubias
Marketing Manager
Tel: 212.798.7174
jcubias@thegoldensource.com



ChoiceMaker Technologies
When Accuracy Counts

ChoiceMaker is a data quality company which uses patented, machine learning techniques to build ultra accurate systems for matching records and removing duplicate records from databases.

Robert Fragola
Vice President Sales and Marketing
Tel: 212.918.4411
robert@choicemaker.com



Odyssey

Solutions for private banks, asset managers, wealth managers and large brokerage firms worldwide Odyssey Asset Management Systems, Inc. is one of the leading providers of private banking, wealth & asset management technology worldwide. Over 200 financial institutions in the U.S., Canada and 27 other countries use Odyssey applications for SRM (Securities Reference Master), Portfolio Management and Client Relationship Management.

Claire Frankel
Senior Pre-Sales
Consultant
+1 917 699 9024
cfrankel@odyssey-
group.com

Candyce Cohen
Senior Sales Executive
+1 201 600 1083
ccohen@odyssey-
group.com



IBM

Information on Demand

The IBM WebSphere® Information Integration Solutions platform integrates and transforms any data and content to deliver information you can trust for your critical business initiatives. It provides breakthrough productivity, flexibility and performance, so you and your customers and partners have the right information for running and growing your businesses.

Bill Roberts
District Sales Manager
Information
Integration Solutions
IBM Software Group
212-745-3337
roberts2@us.ibm.com

Ellie Stone
WW Events Team
IBM Information
Management
IBM Software Group
508-366-4858
elliest@us.ibm.com

Become a Patron

Your company's information can be posted here!

For information about the Patron program please call (877) 659-4309

For information about the Patron program call Denis Kosar 1-877-659-4309