

## **Scope & Stakeholder Management, Pain Points, Perils and Prosperity<sup>1</sup>**

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### **Abstract**

This topic will provide deeper understanding of project “requirements management” elements, scope planning, and a description of the contents of the scope-stakeholder management plan. The purpose of the paper is to share best practices in reviewing scope using the charter, change management, communications, Statement of Work, WBS, and critical alignment of 10th knowledge area “Stakeholder Management.” Specific content is from PMI PMBOK® and listed sources from PMI’s Scope Management Community of Practice. The summary of research-based findings will show that scope creep is to be avoided, but in contrast, scope change is to be embraced with recommendations and examples of, what, when, why and how to accomplish this premise.

### **Introduction**

This paper describes the elements that make good project scope management important, with various examples in the IT and Telecom Domain. It will:

- Discuss the scope planning and management and describe the contents of a scope management plan
- Explain best practices in reviewing a scope statement using the project charter and preliminary scope statement
- Review alignment of the SOW (Statement Of Work - scope statement) with the creation of the WBS work breakdown structure
- Define and discuss Scope Creep, and pose the question – “do we need to stop it?”

As we go through this paper today, I’d like you to be thinking:

- What are some current challenges you have in your projects relative to Scope?

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- How do we ensure we recover from scope changes faster than anybody else?
- How do we be sure we anticipate these things?

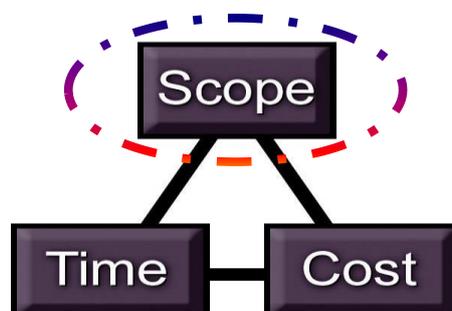
Write down some “Golden Nuggets” to remember from this paper; practical things you’ll want to use and remember in your vocation as well as daily life.

### **The Project Management Knowledge Areas (PMI PMBOK® version 5, 2012)**

Let’s do a quick refresh of the PMI Knowledge Areas:

1. Project Integration
2. Scope Management
3. Time Management
4. Cost Management
5. Quality Management
6. Human Resource Management
7. Communications Management
8. Risk Management
9. Procurement Management
10. Stakeholder Management – *PMBOK® version 5*

In doing a quick refresh on the 10 Knowledge areas, in my mind, “Scope” (or better known as requirements management) is the Over Arching Knowledge Area as the Scope of the project determines much of the project outputs and other knowledge area deliverables. Here we have Integration, Scope, Time, Cost, Quality, HR, Communications, Risk, Procurement, and Stakeholder Management. The above Knowledge Area listing is a tremendous list of facets to project management knowledge and the solid foundation for projects.



**Exhibit 1 -- The “Triple Constraint”**

## Triple Constraint - Quick refresh

Do you remember the Triple Constraint? Of course you do. It is also titled the “Project Management Triangle”. “It is a graphic aid where the three attributes show on the corners of the triangle to show opposition. It is useful to help with intentionally choosing project biases, or analyzing the goals of a project. It is used to illustrate that project management success is measured by the project team's ability to manage the project, so that the expected results are produced while managing time and cost.” (Wikipedia, 2013). It portrays “Scope Schedule and Cost” in the shape of a Triangle. Literally if you **change the scope YOU WILL INEVITABLY affect either Time or Cost**. There are no “if’s and’s or but’s” about it! They are geometrically and statistically mutually exclusive! Thus the shape of the triangle; keep this at top-of-mind when reading this white paper as it will greatly help you.

## Foundation: Processes in Scope Management

### Quick refresh

These are the Foundational processes in Scope Management:

- Scope Planning
- Scope Definition
- Creation of the WBS
- Scope Verification
- Scope Control

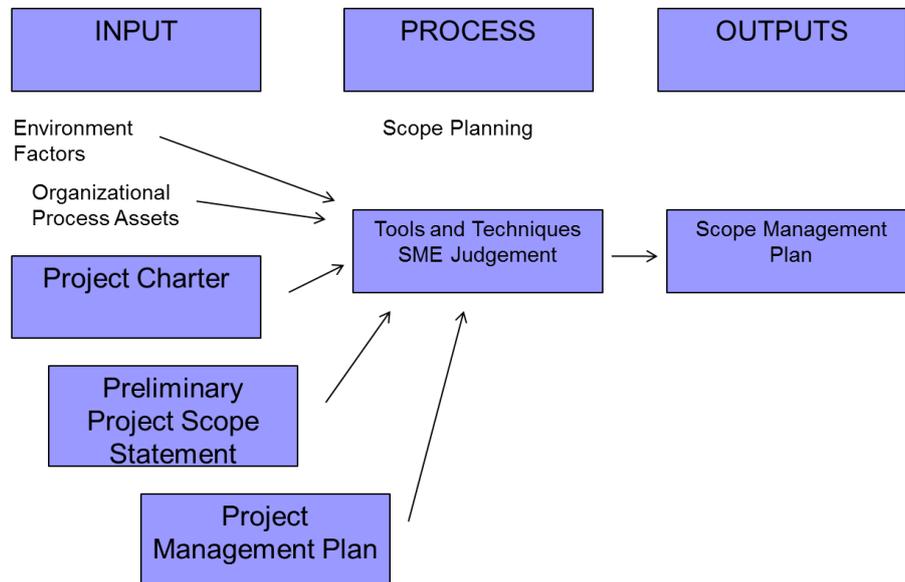
Project Scope – The Work performed to deliver a product, service, or result with the specified features and functions

Project Scope Statement – The description of the project scope, major deliverables, assumptions, and constraints

Scope Creep - The uncontrolled expansion to product or project scope without adjustments to time, cost, and resources according to the PMI Lexicon of Project Management Terms. (Project Management Institute, 2012)

## Scope Planning

### Quick Refresh



**Exhibit 2 – Input, Process, Outputs**

The above illustration on Input, Process and Outputs, is related to a quick refresh from the PMBOK® regarding scope planning. Collecting Requirements – Defining Scope - through Requirements Documentation Scope Management Plan & even creating a Traceability Matrix all will feed the Work Breakdown Structure (WBS).

### Criticality of Understanding Scope

A “soft, fuzzy scope” will be detrimental to ensuring client and corporate expectation is achieved. Research across multiple companies’ find that “Sales organizations” desire to meet client need, make the sale, yet at times, scope is “floating / somewhat undefined”. It’s the PM’s job to identify this, and raise and resolve this issue; otherwise the project will most likely fail.

### Criticality of Understanding Customer Needs

Scope creep (also called requirement creep) in [project management](#) refers to uncontrolled changes or continuous growth in a [project's scope](#). This phenomenon can occur when the scope of a project is not properly defined, documented, or controlled. Scope Creep is generally considered a negative occurrence, and therefore should be avoided.

PMI Lexicon states: “Scope Creep The uncontrolled expansion to product or project scope without adjustments to time, cost, and resources. From the PMI Lexicon of Project Management Terms (PMI, 2012)

## **Customer Expectation must be met**

It is critical that the program manager does not ignore client scope and needs. This is why Stakeholder Management is such a critical area and now a 10<sup>th</sup> knowledge area in the Project Management Body of Knowledge (PMBOK®) version 5. The Agile methodology allows for small wins and “sprints” when it comes to project execution. After a “sprint” client may want to “adjust” the scope. They may not necessarily want to change it but adjust it or clarify it to meet their clients’ needs. Overarching Corporate Expectations must be met. The executive sponsor may desire to adjust the scope to be in alignment with the vision and mission, and ultimately corporate goals and objectives.

This is the reason why it is said “Don’t ignore corporation scope and need. It is also critical for the program manager to keep a critical watch on costs and schedule. Regular VP stakeholder management project executive reviews will help ensure high rigor. Once again it is said, “Don’t allow scope creep!” This is easy to say, yet hard to do; the project manager needs to baseline, re-baseline or escalate the issue in an issues register or issues log.

## **Soft Skills are Imperative**

It is often said to “Be Assertive” in project management and leading a project.

## **Portfolio Management: A Story from a colleague’s client industry experience**

A colleague of mine was asked to Pilot and Launch a client “Minor project” portfolio categorization which consists of multiple projects with a schedule of < 20 PM Days and a cost of < \$50K spend.

The escalation to the CIO was based on - A designated “Minor project” should take 80-100 days from start to finish, yet it takes this client an average of 260 days to complete. WHY? “Doesn’t the client know how to manage projects?” Stakeholder Satisfaction was Low, Net Promoters Score (Promoters – Detractors) appeared negative. They were given a list of 185 Late Projects (Late by the stakeholders’ estimation, but not in the eyes of the end user or the project manager). After a week of six sigma (Design, Measure, Analyze, Improve and Control, DMAIC) research, the team analysis revealed a problem. The stakeholder negotiated end date was not re-baselined or changed, but Scope (requirements) changed on most of these projects. It was the fault of the stakeholder and the project service delivery provider. Both should not have allowed the scope to change and not the stakeholder negotiated end date, which caused the service delivery provider to miss Service Level Agreements, (SLA) causing monetary penalties.

Some “golden nuggets” relative to the Criticality of Managing Scope based on Stakeholder Needs:

- Expect the Unexpected
- Know your Client (what can be said / not said)
- Know how to say “No” though not saying “No”
- Meet Client Needs

- Meet Scope definition
- Control Costs
- Control Time
- Control Client Satisfaction
- Control Scope!

You must be establishing the Baseline! - You must do it!

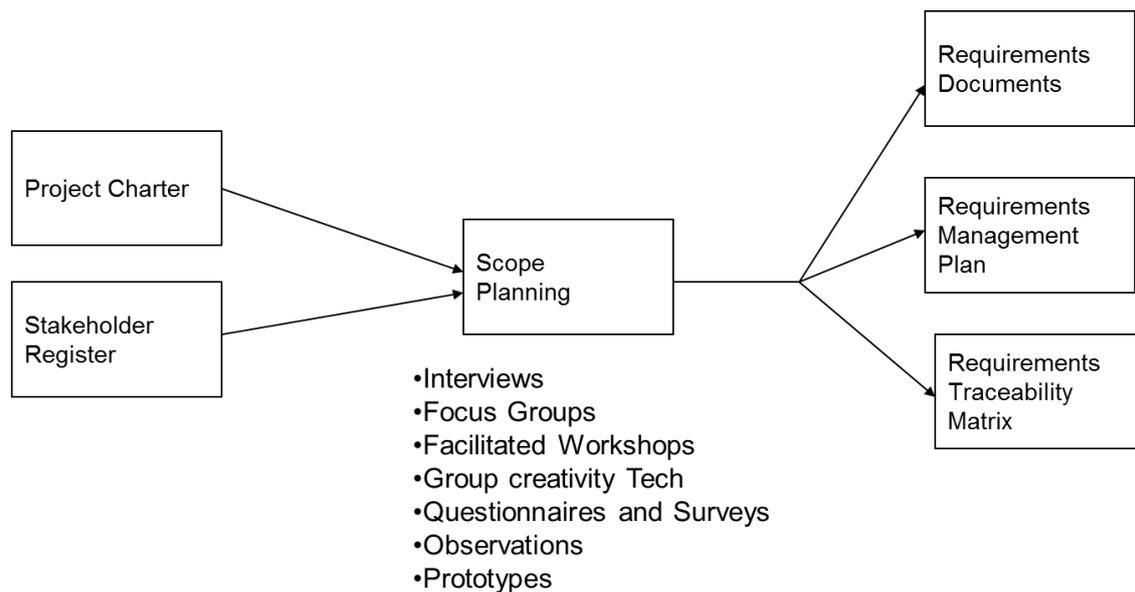
PMI Lexicon States ... *Scope Baseline* The approved version of a scope statement, work breakdown structure (WBS), and its associated WBS dictionary, which can be changed only through formal change control procedures and is used as a basis for comparison. (PMI, 2012)

You as the program lead, do not really want to say “No” to your customer (of course)! You want to say “Yes, and...”, there may be additional cost or time if we adjust the scope.” (Notice I didn’t say change). You can say this “adjustment” to the scope is beyond a minimal feature and will cause us to enter a change request to the Customer Negotiated (Scheduled) Due Date.

### **Demystifying Requirements**

Below is a good list of activities and initiatives that are recommended to take place to better ascertain and gather requirements:

- Interviews
- Focus Groups
- Facilitated Workshops
- Group creativity Tech
- Questionnaires and Surveys
- Observations
- Prototypes



**Exhibit 3 – Collecting / Demystifying Requirements**

The above “Collecting / Demystifying Requirements” diagram Exhibit 3, depicts **other key inputs to consider**. It is recommended to review each of these inputs in the PMI PMBOK®, to gain a further view of what should be considered. In a group setting, Discuss “who” or “what” should be involved. The PMBOK® states it is the best practice to use the team member who will be performing the work (or the performing organization) to breakdown the work.

## **Pain Points**

### **Scenario #1**

Here’s a good scenario from many industries (such as automotive, construction, IT, and others). The sales account executive may desire to meet client’s need, make the sale, get the project kicked off, yet scope may be “floating” somewhat undefined. If you as the project or program manager let the scope “float” to get execution schedule moving forward, you risk circumventing the cost and the time. (Triple Constraint)

The repercussions will be:

- Cost increases and reduces profitability for your org
- Time increases and project is late (*or never ends*)
- Client may appear happy but no profit for your company – *cost overrun*
- Pain Points – things we can easily encounter – The Sales or Marketing team can also be your sponsor. They need to close the deal, it’s up to YOU to be sure the SCOPE is SOLID, Very Solid to prevent customer “dissatisfaction” with our service, product.

The Moral of the story: Clarify Expectations!! Communicate! Listen!

## **Scenario #2**

A story from when I was PMI Phoenix President in 2009. We were launching our second symposium (professional development day). We contracted in an outsourcing arrangement with a marketing company. This company was brought on in 2008. The scope of the effort was clear, yet the service level agreements and objectives (SLA/SLO) deliverables vague. This resulted in the contractor vendor becoming exempt or “off the hook” from delivering marketing items within specific time-frames. Vendor thought they met target when they did not. Our client satisfaction became poor. The Result: The customer was dissatisfied; the vendor contract was not renewed.

To remediate the situation, the VP of External Relations/Marketing adjusted the scope and schedule to meet client (member) needs and survey requests,

### **Result:**

The triple constraint prevailed and Cost was increased. Yes, we had client satisfaction and success for our members. We also had high accolades, and successful write up in the PMI Today newspaper.

The Pain Point for the Chapter was that the Scope was changed (not scope creep) yet costs exceeded initial budget. These unfortunately depleted funds accumulated from our chapter corporate sponsorships.

### **Lessons Learned/Remediation:**

The VP of External Relations/Marketing strengthened the Corporate Outreach team. Ambassadors were sent out two by two to corporations, and the chapter attained additional corporate sponsorships

### **Action Plans:**

On the next event the team would do a better job of locking down the Scope - communicate more thoroughly with Vendors. They would do a better job of Scope Management in managing Scope Creep.

Lastly, they would identify “hidden cost surprises” early.

I just gave you a story from client and outsourcer. The next story from my election as President of PMI Phoenix Chapter was prior to being president, I was VP of Marketing. I was tasked to create a marketing plan with my volunteer team which I did. Part of the marketing plan was to “Outsource our Branding and Advertising” to a supplier. I went on to become president and delegated it to a new VP External Relations. Due to some Role Clarity issues and conflicts the vendor ended up “off the hook” from delivering the marketing items. We were dissatisfied as a chapter and the contract was not renewed.

Lessons learned determine an issue both with the Chapter and the Vendor responsibility. We should have been clearer on expectations, and the vendor on delivery.

**Mantra #1:**

My Lessons Learned Mantra: Listen, Listen and Listen More!

**Mantra #2:**

My Expectations Mantra: “Vagueness is not your friend.” I’ve developed a Mantra over the years in my tenure: “Vagueness is not your friend.” Clear expectations, and clear SCOPE and requirements are your friend, and adhering to it.

**2. Perils**

**Rejecting Scope Changes**

Rejecting scope changes reduces client satisfaction. It also reduces PM credibility related to their role of customer advocacy. This is not a “black & white” decision.

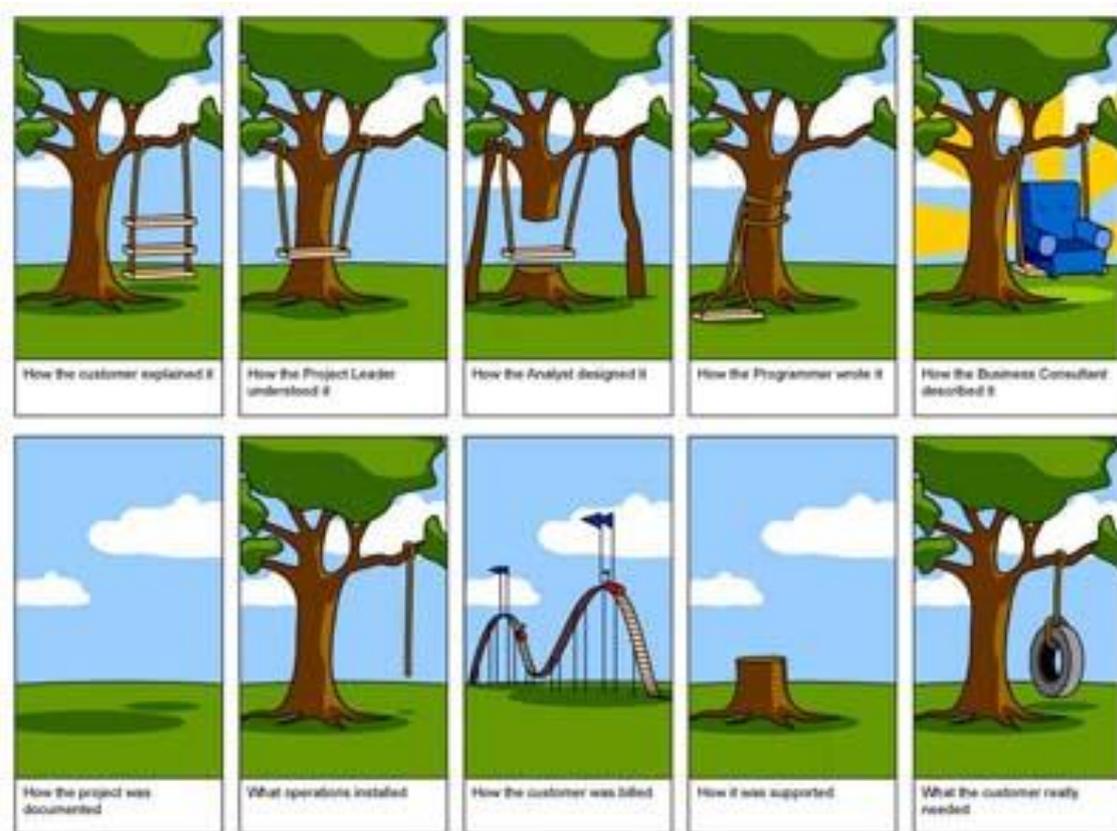
**Not understanding scope**

Here’s where we can get into Client Battles, Customer Satisfaction issues, Low Net Promoter Scores. “Reject”. I have a story of a colleague who was assigned to an account in the past and they were told by their leader (who is no longer with the organization), “Reject” the order. Reject it and send it back to the customer telling them we rejected it. Now if a person wants to reduce their credibility and get thrown off an account, just start rejecting the customers’ needs. This research finds it is best to take the time, and even spend time with your sponsor and/or your marketing/sales partner, collaborate with them, and UNDERSTAND the scope.

**Perception and interpretation**

- Here’s how the Customer Explained it,
- How the Project Leader understood it.
- How the Analyst or Technical Solution Architect designed it.
- How the Programmer wrote it.
- How the Business Consultant described it.
- How the project was documented.
- What field engineering or Project Delivery installed.
- How it was supported by the Life Cycle Management\_Team

The moral of the story: What the customer really needed was completely different from how it was interpreted and perceived!



**Exhibit 4 -- Perception and Interpretation**

The above cartoon ([www.projectcartoon.com](http://www.projectcartoon.com), 2006), Exhibit 4 Perception and Interpretation, has been widely shared regarding managing scope. The moral of the story relates to “Lessons Learned: again. Listen, Seek to Understand, Ask Clarifying Questions. “It’s NOT About YOU!” It’s about them, the customer, sponsor, stakeholder, meeting their needs.

The advice here is: “Listen, Listen and Listen” – “Seek First to Understand, Then to be understood” as Stephen Covey says in his book *7 Habits of Highly Effective People*. “Use empathic listening to be genuinely influenced by a person, which compels them to reciprocate the listening, and take an open mind to being influenced by you. This creates an atmosphere of caring, and positive problem solving.” (Covey, 1989)

### 3. Prosperity (successes)

Scope creep: “The insidious growth of a project beyond its original objective.” (PMI Lexicon)  
From the PMI Lexicon of Project Management Terms (June 2012)

While scope creep can be devastating to a project, it can at the same time **offer tremendous opportunities** for organizations to ...Improve their products; Increase sales build reputations, Improve relationships with their customers!

## **Baseline your schedule**

Of vital importance is the establishment of a written, detailed baseline. After proposed changes are approved, change documents should update this baseline, address all significant factors, and be clearly communicated to all parties involved! A great twist in scope creep – How to turn a potential DISASTER into SUCCESS! “Scope creep (really scope change) can offer tremendous opportunities.” (Keifer, 1996, p 33)

The goal of the program and portfolio manager is to recognize scope creep early, address it by indicating you are willing to put in a change request, which may alter the schedule and/or cost.

## **3. Prosperity (successes)**

### **Scope creep**

In early stages a project’s scope can easily grow through changes in customer needs and wants, miscommunications, poor assumptions, and successive minor additions to design. Even though Scope Creep can be devastating to a project, the pressure to increase scope of a project will always be there, yet if properly managed, like managing change, it provides significant opportunity to the performing organization.

### **Key indicators of scope creep**

Project Timing: When Timing starts to slip the growth of the program should be suspected

Budget: When Budget starts to overrun for no identified reason, determine if more work is being done than was originally agreed and budgeted

Added “bells and whistles”: when the prototype has changed, or additional items or definitions of items are portrayed

## **3. Prosperity (successes)**

Change = Opportunity

Literally, change equals opportunity. Major changes in project direction are usually well recognized / accounted.

The day to day interaction with your customer, results in small and compounding refinements to project direction. That is why it is important to monitor the scope with proper pulse checks, and evaluations. Properly recognized and handled, these scope changes can represent tremendous opportunity for meeting client’s needs, and for sales expansion. A continual refinement of project direction and finding the limits and boundaries of scope enhancements versus creeping, and detrimental changes is critical as we meet with our stakeholders.

The assumptions regarding development are then often refined.

Example Industries include the following:

**Software Development:**

In software development, the functional specifications could change or creep throughout the development of an application or a website.

**Information Technology (IT) Telecom Domain:**

Thoughts from the IT Telecom domain relates to data hardware devices such as Routers, Switches, Firewalls, Local Area Networks (LANS), Wide Area Networks (WANS), Circuits (the network connectivity or phone lines between devices from a circuit or Telecom provider), Virtual LANS (VLANS), Wireless Access Points (WAPs), Managed LANS (MLANS), Virtual Private Network (VPN)'s.

**Construction:**

The costly trimmings or better paint is a good example of creeping or changing scope

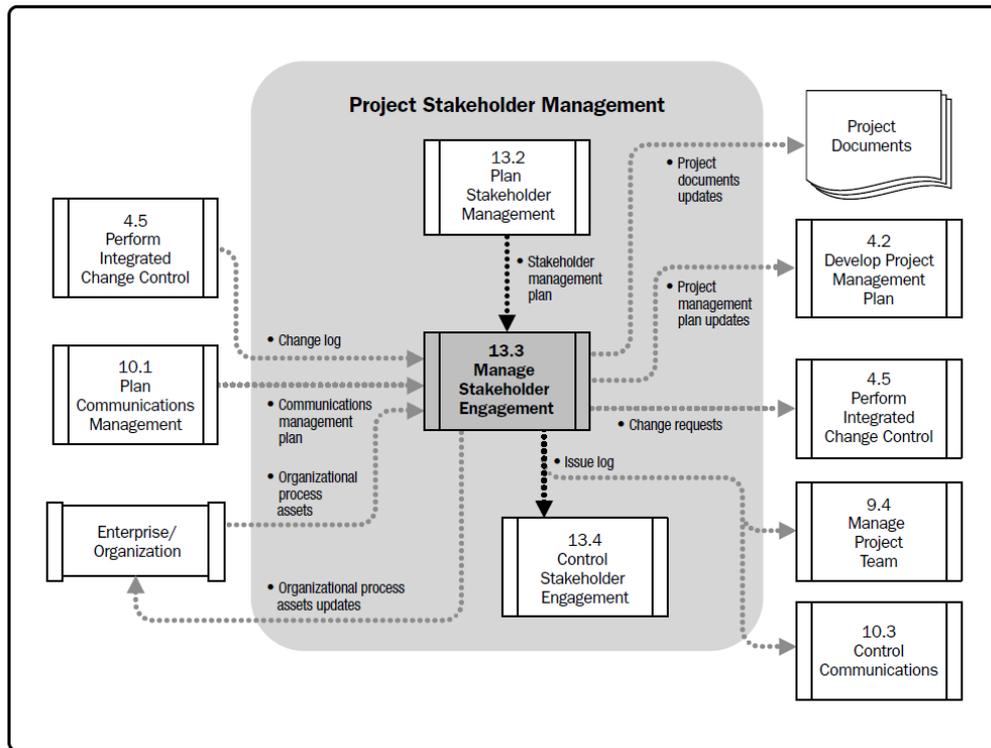
Setting the Limit: where a new project or subproject needs to be created (*and current project closed*).

Change = Opportunity. Major Changes in Project Direction are usually well recognized / accounted.

Again, properly recognized & handled these refinements in project direction can represent opportunity.

**Stakeholder Management from PMBOK® version 5**

In my mind, stakeholder management also relates to boundaries and limits– keeping the “good in and the bad out” as said by Dr. Henry Could. The program manager needs to communicate the boundaries of the project – the scope limits before it becomes a “change”. Research shows project executives highly recommend “Don’t allow Scope to “Morph”!



**Exhibit 5 “Identify Stakeholders Data Flow Diagram” - PMBOK® version 5 (2013)**

Exhibit 5, The PMBOK® version 5 “Identify Stakeholders Data Flow Diagram” Figure 13-3 on page 393 enhances stakeholder management into the following sub classifications. (Project Management Institute, 2013, p 393)

- Identify Stakeholders
- Plan Stakeholder Management
- Manage Stakeholder Engagement
- Control Stakeholder Engagement
- Project Stakeholders influence and can control deliverables and control scope (if the project manager allows them).
- Manage Your stakeholders sharing necessary information, yet developing and sharing **boundaries** of the project

Other items that should come into play for stakeholder management

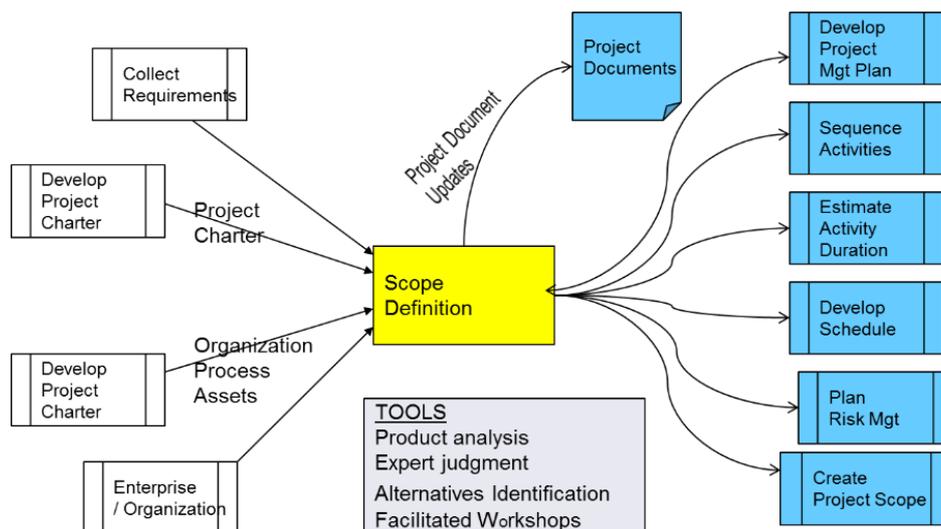
- Power/Interest Grid
- Power/Influence Grid
- Influence/Impact Grid

- Salient Model
- Deciding what quadrant for each stakeholder having influence over project to ensure scope is solid – Keep Satisfied, Manage Closely, Monitor, Keep Informed
- Issue Log
- Change Requests
- Project Management Plan Updates

(PMI, 2013, pp 391-415)

I highly encourage you to read these pages 391 – 415 in Project Management Body of Knowledge PMBOK® 5<sup>th</sup> edition as they are well thought out and comprehensive.

## Define Scope



**Exhibit 6 – Scope Definition Diagram**

Exhibit 6, the Scope Definition Diagram illustration, demonstrates the inputs of Define Scope, the outputs (in blue), and the next steps. Concentrate on the act of Define Scope and the outputs. There are 4 tools in Define Scope, all listed above. Define how to use/apply each tool and WHY it is important. As an example, can you ignore stakeholders' expectations of what the product will deliver (or requirements?)? Next, discuss ways in which you can attack Define Scopes. Discuss the pros and cons of each way. The purpose of this exercise is to get the class to visualize a real-life scenario. For practitioners studying for the Project Management Professional (PMP) exam, this is good practice for the PMP exam.

## Project Scope Management

The best scope management is defining and controlling what is and is not included in the project. Project includes all of the work required, and only the work required. Project Scope (work) versus Product Scope (product features and functions) is a very important aspect. The project scope is

measured against the project plan. The product scope is measured against product requirements. The project scope is the work that needs to be accomplished to deliver a product, a service or a result, (with the specified features and functions).

Scope management must be done on a daily basis. PM's are constantly reminding their teams of what is in scope and what is not in scope. The sponsors who are paying for this project are counting on the PM to ensure only the work required is done because that is what has been funded and approved to be done.

It's all about **communication** and more importantly **connection** which results in "leading with distinction".

### **Work Breakdown Structures**

There are many examples of a WBS related to Scope and Stakeholder Management. Many authors have different views, but PMI recognizes more than one way to depict a WBS. However, the PMBOK® one is the most widely accepted. Typically, we see only a high-level WBS. A good recommended exercise is to pick a box of a WBS and explain what more can be done to breakdown that box until it cannot be broken down again.

### **Beware of the Rogue Wave**

Most importantly a program or project manager needs to beware of the "Rogue Wave"

Rogue Wave – What is it? These are the freak waves, monster waves, killer waves, extreme waves, and abnormal waves) are relatively large and spontaneous ocean surface waves that are even a threat to ocean liners and large ships. Their height can be 50 Feet, even up to 115 feet a few times a year.

So how do we prepare for it? The easiest way is to expect the unexpected (like a submarine)!

Remember "Scope Creep" the uncontrolled expansion to product or project scope without adjustments to time, cost, and resources. The Strategic Planning Process is mapping out our route with strategic thinking. Then use strategic plan to guide decision making and driving throughout the trip. We need to read the signs along the way, do an "Environmental Scan."

In summary, "Manage your Scope, It's more than a hope, and Keep you Stakeholders in line!" – Doug Orlando.

### **Appendix:**

#### **Scope and Telecom Domain - Best Practices scope example**

The Telecom Industry involves programs in the Local and Wide Area Network domain which has projects involving Circuits, Routers, Switches, Firewalls, Access Control Lists, various protocols. For LAN/WAN combinations, the scope defines what results are to be achieved, the information that is to be analyzed

The degree to which the information will be analyzed and the parameters within which the work will be conducted defines what results are to be achieved. One of the key steps in the project process is the definition of the project scope as this then defines the work to be done as in all projects. Due to the complex nature of these projects, it is even more imperative that the scope is rigorously managed, and change procedures implemented should scope creep begin to be recognized.

### **Project Telecommunications Service Project Profile**

The telecommunications baseline and the contracts, network diagrams, bandwidth requirements, service locations, and other information combine to form a database that defines the telecommunications service included in the project. Consultants refer to this database as the Service Project Profile. The Profile defines the starting baseline from which all changes are defined and all savings are measured.

**Baseline:** A variety of data is obtained (mostly from the Client) and used to build the telecommunications baseline. The baseline is then combined with the non-inventory information to determine the available options, potential efficiencies, savings as well as potential alternate profiles of system/network configuration. For network sourcing Or outsourcing, typically data may include:

- One to three month's telecom invoices for all voice and data services within project scope
- Copies of all active contracts, including amendments, attachments, schedules, etc.
- A current list of organizational site locations / addresses.
- Any available Network diagrams and key applications (with bandwidth requirements if known) in use over the network
- LOA Letter of Agency Authorization for access to Client's records from carriers.
- Client personnel contact information, for those individuals responsible for forwarding data and being project liaisons.
- List of any billing disputes previously identified
- Description of any planned voice or data changes
- Traffic studies
- Accounts Payable report for most recent 12 months (typically required only if billing disputes are involved within the project scope)
- Supplier Integration Team
- Carrier account team contact information for all carriers within the project scope.

(Osstelco, 2010, ¶ 3)

## **Project Telecommunications Service Profile Analysis**

The telecommunications profile is analyzed by the analysts to determine data completeness and then to define potential optimization opportunities, potential configuration changes and potential savings opportunities based on the data, the costs, the utilization, the currently available technology and the available alternative options. The goal of this project phase is to define the various opportunities that potentially exist to reduce costs and increase flexibility or increase service levels at the same or reduced costs thus providing increased telecommunications value to the client. (Osstelco, 2010, ¶ 3)

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## About the Author



### **Douglas Orlando, PMP**

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**Doug Orlando** is Sr. Technical Director for Program Management at AT&T Global Business Solutions. He is an accomplished Fortune 50 professional with over 25 years' experience focused on strategic planning, delivering complex project/programs, transitions, transformations, and process service excellence for AT&T's largest IT outsourcing accounts. Productive mentoring leader and global people manager motivated by driving ideas of efficiency design into tangible results. Conceptual value driver recognized for customer relationship and communications management, time-cost savings through organizational development, training-workforce optimization in IT Telecom network operations and strategy with multiple awards such as AT&T Diamond Club.

Numerous technical and leadership positions held at Fortune 50 companies, including:

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Mr. Orlando holds a Bachelor of Science degree in Computer Science, Telecom and music minor, from Roosevelt University Chicago, and an Executive Masters in Business Administration (EMBA) with concentration in Strategic Management /Finance/ IT Operations from Northern Illinois University College of Business. He has multiple certifications including Project Management Professional (PMI PMP), IBM Certified IT Availability Manager, ITIL Foundations, Six Sigma Green/Orange Belt, Cisco CCNA, Arizona Government IT Agency (GITA) of project professionals, and several AT&T technology certifications (SDN, Agile, IP Networking, Big Data, Security First).

He is an active volunteer and member of the Project Management Institute (PMI), Past Chair/President of PMI Phoenix Chapter, PMI Global Board MAG Leadership Advisory member, speaker at PMI Global Congress, Leadership Institute and PMO Symposiums, current AT&T Project Management Network (PMN) Executive Board member, AT&T Asia Pacific Islanders for Community Advancement, and the Aspire Mentoring Academy, Outside of work he is an active volunteer in his church directing, producing, writing, playing and teaching at music performances, loves to travel, and has won the PVSA President Volunteer Service Award on 6 occasions.