WSR *CONSULTING GROUP, LLC*

Consultants & Expert Witnesses in Computer Systems and Software Projects

Below are **Seven Proposed Presentations for your Consideration**[1] newly developed, customized, updated, enhanced and/or presented by Warren S. Reid or Lubomyr Chabursky of WSR Consulting Group, LLC. for 2007:

I.   **"Surviving and Thriving in the Changing World of Technology: Reid's Remedies 1-10"**
II. **"There Are Six Sides to Every High-Tech Valuation: Secrets Every High-Tech Lawyer Should Know About How to Value High-Tech Companies, Deals & Assets"**
III. **"The 50 Ps of Software Project Success"**
IV. **"CPR: Reviving the Drowning Large-Scale IT Project"**
V.   **"Ten Classical Causes of Testing Failure that STILL Persist and What You Can Do About Them"**
VI. **"Dramatically Increasing Project Success with Radical QA: A Guide to Managing Expectations and Results"**
VII. **"The Scope Game – Winning With a Moving QA Target"**

This webpage describes our latest and current presentations/seminars/workshops, including some brand new ones. All are scalable, from 60 minute briefings and presentations to longer workshop formats.

Call us to discuss any of these further, and about how we might customize the materials and presentations to your specific needs. Also, consider referring these to:

1. Individuals that you think would have interest and would benefit.
2. Persons who would have interest in my doing these topics in their organization.
3. A good author doing an intelligent compilation of creative IT thoughts for a book
4. A Conference Board/Planner/Manager of major, world-class IT, Legal or Business conferences
5. As additional credentials, to anyone who might want to engage WSR Consulting Group, LLC as a consultant, assessor or expert witness on projects, issues, and matters related to these topics.

Thank you,

Warren S. Reid

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Seven Proposed Presentations for your Consideration (By Warren S. Reid - updated 2006-11-27)

I. "Surviving and Thriving in the Changing World of Technology: Reid's Remedies 1-10"

By Warren S. Reid, Managing Director, WSR Consulting Group, LLC
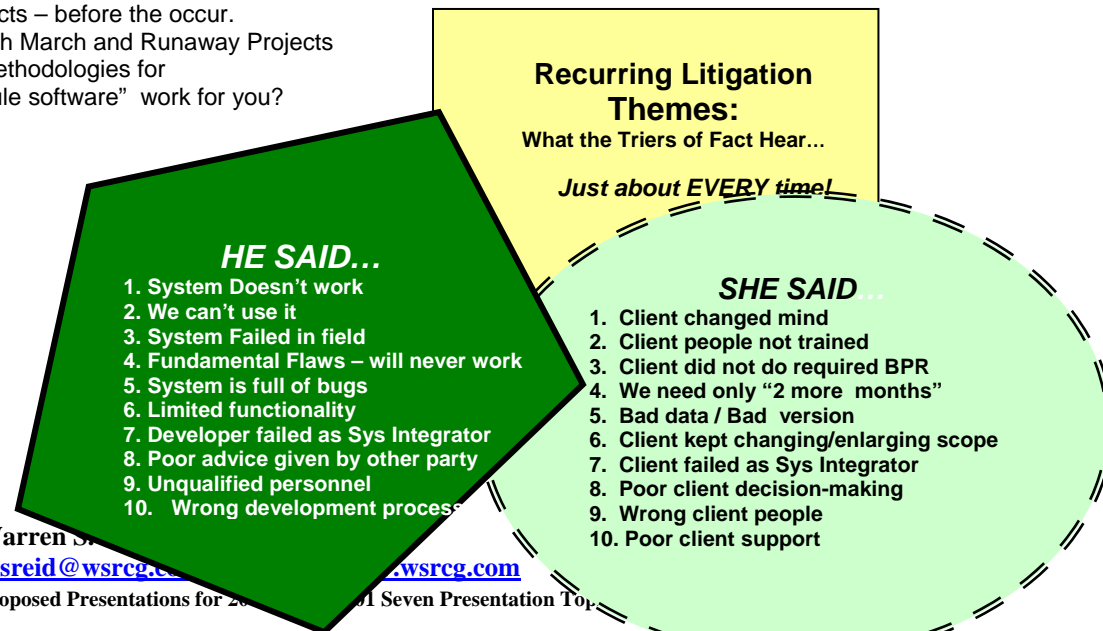*Copyright 2005, 2006. All Rights Reserved*

As an industry, software development and implementation has been structured, objectivized, CASE-d, tooled and retooled, TQMed, walk-throughed and inspected, BPRed, ERPed, CXOed, outsourced, in-shored and off-shored, webified, extremed and agilated, and SOXed!
Yet after decades of these new panacea technology introductions, the rate of software and software project success still hovers at only 30% in the U.S. – and $55,000,000,000 is written of each year on scrapped software projects.

Why has this happened? Are we doomed to a failed future? What can you, your organizations, project directors and industry leaders do about it so your projects and software can be successful?

Mr. Reid will present his philosophy, experience over the last 36 years, recommendations and rules in how to be successful in your software development and implementation endeavors and projects though a series of real case lessons as a project leader, as a developer of world class methodologies, and as an expert witness in court in matters involving alleged software and software project failures.

His topics include:

- Why the 15 great panaceas of the last thirty years have failed and what really needs to be done to increase success rates.
- IT Lawsuits ("It's always the same 10 complaints – all over the world!")
- Why requirements and scope always change and how to deal with this reality.
- Getting to the "MEAT" of the problem -- apparently the four least understood aspects of systems life cycle! (**M**aintenance, **E**nhancements, **A**cceptance, and **T**esting)
- Identifying, managing and mitigating common risks to all large projects – before the occur.
- "Radical Project Management": Lessons Learned from Failed, Death March and Runaway Projects
- Will the move from disciplined to "Xtreme" & "Agile" development methodologies for delivering allegedly "better, cheaper, higher quality and on-schedule software" work for you? What are the caveats?
- Recommendations, and points to consider, for each topic above

Recurring Litigation Themes:
What the Triers of Fact Hear...

Just about EVERY time!

HE SAID…
1. System Doesn't work
2. We can't use it
3. System Failed in field
4. Fundamental Flaws – will never work
5. System is full of bugs
6. Limited functionality
7. Developer failed as Sys Integrator
8. Poor advice given by other party
9. Unqualified personnel
10. Wrong development process

SHE SAID …
1. Client changed mind
2. Client people not trained
3. Client did not do required BPR
4. We need only "2 more months"
5. Bad data / Bad version
6. Client kept changing/enlarging scope
7. Client failed as Sys Integrator
8. Poor client decision-making
9. Wrong client people
10. Poor client support

II. "There Are Six Sides to Every High-Tech Valuation: Secrets Every High-Tech Lawyer Should Know About How to Value High-Tech Companies, Deals & Assets"

By Warren S. Reid, Managing Director, WSR Consulting Group, LLC
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Typical approaches to valuing high-tech assets, companies, applications, and deals have missed the mark for a long time. Classic asset based approaches (book value, adjusted book value, replacement cost, liquidation (orderly or forced), cost to recreate); (b) comparison based methods; (c) publicly traded company method; and (d) capitalization/discount based methods are no longer good enough – if they ever were -- for valuing high-tech properties. Such approaches just don't explain why so many high-tech properties under perform, or why IBM "overpaid" for Lotus Development by $2 billion.

Anyone who wants to properly value a high-tech company or solution for purposes of the Merger & Acquisition team table, the negotiation table, the boardroom or the courtroom, needs to look at all sides of the property – especially the following six sides:

Figure 1

I. **Management/Critical Staff**
II. **Markets/Marketing**
III. **Technology/Products/Services**
IV. **Finances**
V. **Legal**
VI. **Intellectual Capital**
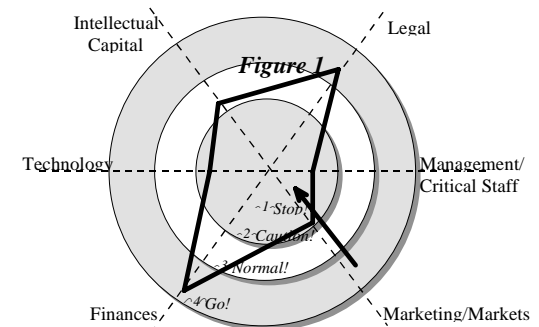
Knowing how a company or assets fare in these six interrelated areas, will give you the greatest insight as to what their long-term value and potential are, and what to focus on to dramatically increase property value! That is why the University of Southern California (USC) has made Mr. Reid's model a part of its Masters and Ph.D. program in **Strategic Management of Technology** in 2006, and then again in 2007.

In this presentation, Warren S. Reid will present the kinds of special analyses and questions that you will want to ask regarding your client's high-tech opportunity. Mr. Reid offers a series of approximately 150 questions, with contextual explanations, empowering the attendees to answer the questions for him/herself for his/her own specific situations.

A major bonus is that these six areas equally apply to businessmen, lawyers, venture capitalists, corporate valuation specialists, board members on high-tech companies, investors and others who are investigating transactional opportunities, mergers and acquisitions, companies going public, as well as litigators and expert witnesses whose responsibility is to help triers of fact determine asset values. Interestingly, the model can be very helpful in determining why companies, integrators, consultants, and software developers succeed or fail in defining, developing, implementing, and/or maintaining large-scale systems, applications, and projects. That is the power of this methodology!

A fun but rigorous way to rethink or tighten up your SDLC methodologies that stopped working!

This interactive presentation is for intermediate/advanced Project Managers and CXOs, based on Mr. Reid's software development, project management, and expert witness work. It is consistent with best practices in several world class institutions and governing bodies. **A different presentation is available for attorneys who contract for or litigate large-scale systems projects issues.**
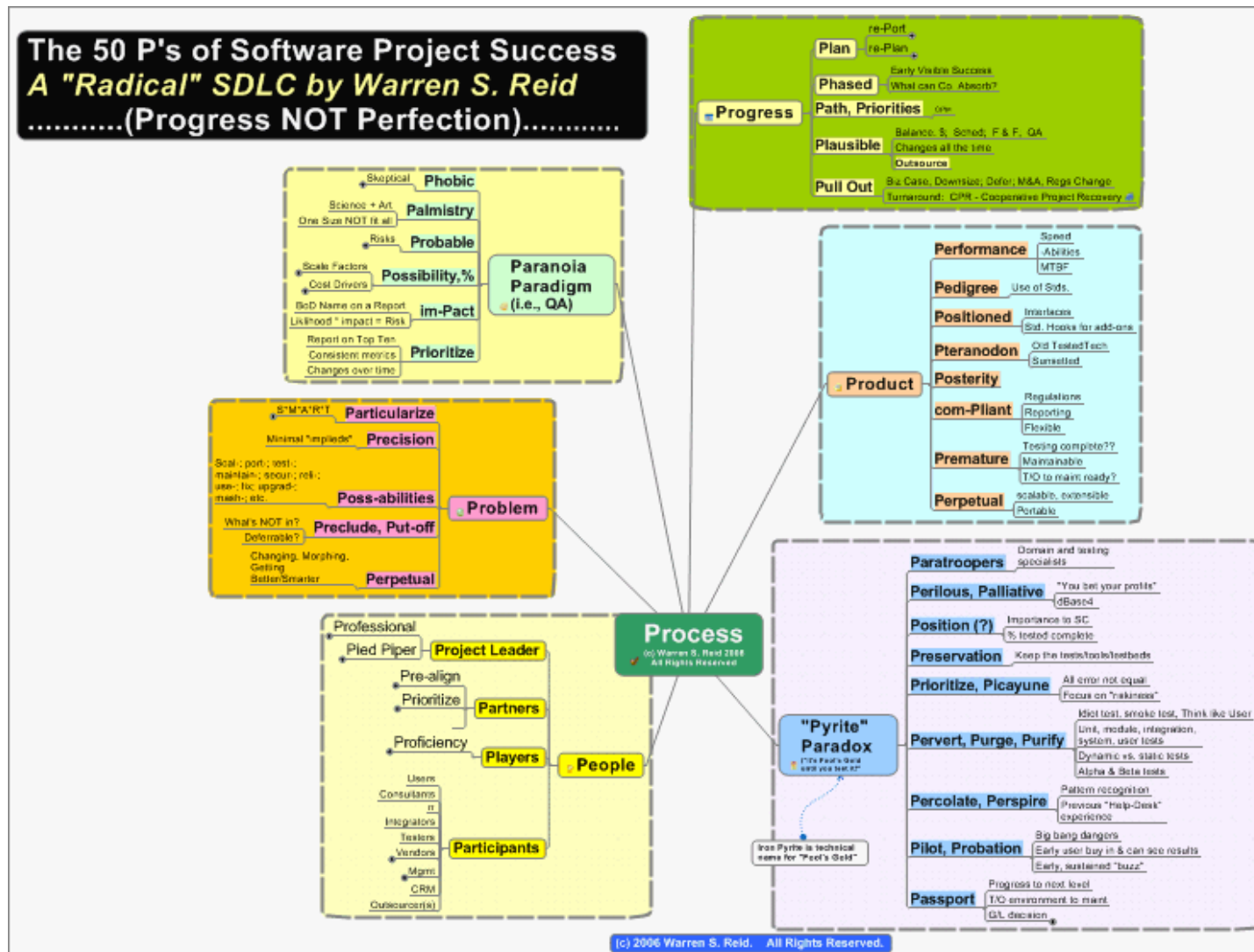
Phone: 818-986-8842   email: wsreid@wsrcg.com   website: www.wsrcg.com

IV. CPR:[2]
Reviving the Drowning Large-Scale IT Project
By Warren S. Reid, Managing Director, WSR Consulting Group, LLC
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Overview

In 2004, one-third of all IT projects were reported as failed and were scrapped! One-third were "challenged" and came in with deplorable budget and schedule overruns! Only one-third were deemed successful!

Warren S. Reid will show you what can, and in most cases, **must be done** to turn around the runaway IT project and try to get it into the "successful" column -- before you ever litigate (and hopefully, you won't have to).. By referencing actual anecdotal turnaround cases (and some litigation situations that could have been avoided) that he has worked on, Mr. Reid will present a proprietary, multi–tiered, 13 step model that focuses on what actions must be taken during a failing project to turn around, overcome and compensate for project management, methodology, technology and people deficiencies/issues.

A real **bonus** to Mr. Reid's presentation and model is that this same model and related procedures, if contracted for and employed early in a project, will prevent runaway situations, and also be useful as a yardstick for good IT industry standards and practices to be used in the courtroom.

This Presentation includes:
1) The CPR Model (and a presentation of each of the 13 critical steps)
2) Software project statistics and trends over the past 8 years
3) Typical u.s. latent error/defect statistics for various types of software projects
4) What are the software project *estimating* factors
5) Typical known risks before a project starts
6) Recurring litigation themes: what the triers of fact hear – just about every time – in large scale systems failure matters.

You won't want to miss this one!

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[2]CPR is **Coordinated Project Recovery**

Revitalize For Success

Honest, "Non-Rosier than Actual" Communication

Sleuthing Planning Discovery

Conduct a Forensic Review

Revise Business Case & Estimates

HUA!: Define "Success"; Re-contract

"Right Stuff": Reqmts. Priorities

Staffing Coordinating Organizing

Engage The "Right" People

Implement a Software Adjudication Team (SWAT)

Early and Ongoing "Adoption"

Evaluate and Properly Execute Outsourcing

Directing Executing Refocusing

Adopt an Appropriate Methodology [incl. Go-Live Decision]

Employ Proper Project Management & Tools [Manage Risk Be "S*M*A*R*T"]

Conduct Reliable and Necessary Testing [Dynamic & Static]

Plan & Execute Your Go-Live Decision/Process (Acceptance)

CPR: Coordinated Project Recovery

V. "Ten Classical Causes of Testing Failure that STILL Persist and What You Can Do About Them

By Warren S. Reid, Managing Director, WSR Consulting Group, LLC
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While the testing of computer systems and software has certainly improved over the last two decades, there continues to be ten mainstay causes of testing failure which, taken together, help explain why "two-thirds of systems projects are scrapped or challenged."

In addition to finding these failure causes on projects my teams have turned around, I have been involved in legal matters where opposing experts have testified with conviction to these same following misconceptions that cause testing failure:

1. Testing methodologies are only a guideline to be used at the Test Detectors' discretion.
2. You don't need industry experience or platform experience to manage a large, industry specific, testing project.
3. You can manage large test efforts and test defect logs with Excel, Word, PowerPoint and emails.
4. "Critical path" is all the critical items that must be done before go-live.
5. I/we know the status of our testing efforts – thus I/we don't need to manage risks.
6. "Aggregate" testing (i.e., overlapping test phases) will shorten the test cycle.
7. We only have 30 non-critical errors left – its time to go live!
8. On large ERP installations, software <u>customization</u> is the vendor's problem; software <u>configuration</u> is the customer's problem.
9. Strong and thorough dynamic testing with "full coverage" will flush out the most critical errors before go live.
10. You don't need test tools – they cost too much, take too much time to learn, and introduce a new level of errors into the project.

Why do seasoned project managers and expert witnesses allow or testify to such things under oath?

Do these things make sense? Can they be right? Or partially correct? Why do these arguments have such appeal with project managers, project champions, Project and IT Steering Committees, judges, arbitrators, and juries?

Will these arguments cost you your project? Or your job? Or your future?

Mr. Reid, a recognized IT and systems consultant and testifying expert in North America, Europe, and Asia will challenge these assertions, as he has done on projects and in courtrooms, and uncover the fallacies and the truths behind them, and what you must do to properly protect your project, your job, your colleagues, your company, and, if your are unlucky -- your legal case.
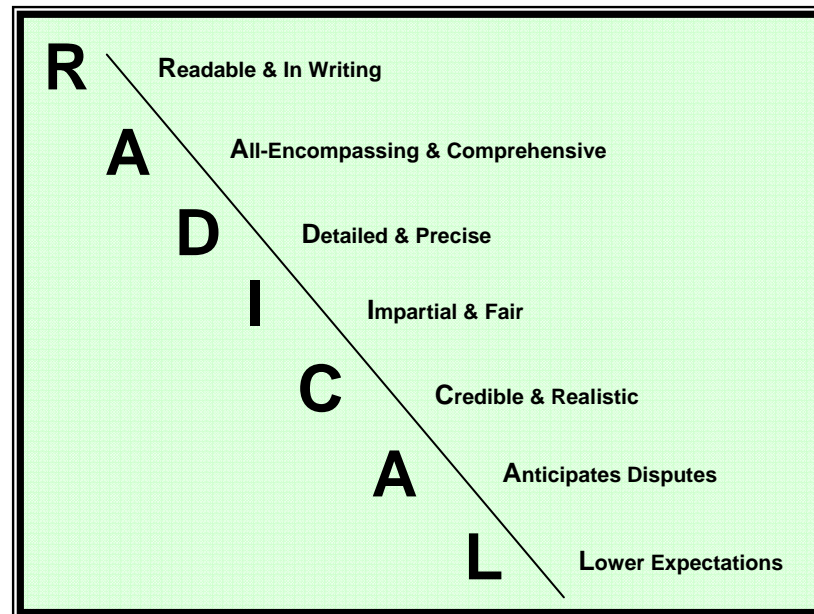
VI. Dramatically Increasing Project Success with Radical QA: A Guide to Managing Expectations and Results

By Lubomyr Chabursky, LL.B., LL.M., M.B.A
Senior Manager, WSR Consulting Group, LLC

Most systems development projects struggle and fail due to discord and discontent that emerges as a result of imprecise, ambiguous and less than comprehensive contractual principles and commitments.

This thoughtful and lauded presentation and article encapsulates the methodology that WSR Consulting Group, LLC employs to apply traditional quality assurance processes in a radically new fashion to ensure that the principles and commitments underlying the relationship of the developer and customer are clear, precise, comprehensive, realistic and balanced.

Parties that do this successfully will enjoy better run projects, as they stay on the same page regarding their expectations about resources, schedule, functionality, quality, roles, responsibilities and project processes. Lubomyr Chabursky's thoughts about Radical QA were first published in the June 2005 "peer-reviewed" issue of the Journal of the Quality Assurance Institute.

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VII. The Scope Game – Winning With a Moving QA Target

By Lubomyr Chabursky, LL.B., LL.M., M.B.A
Senior Manager, WSR Consulting Group, LLC
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"It may have been what I told you I needed – but it's not what I want" - this story repeats itself project after project.

Scope change will always be an issue! Delivering mockups, prototypes or a complete system to users will cause them to think of and ask for more, when they see what they can have – it's human nature and the process of how humans learn. Knowing when and how to defer "newly uncovered but questionably necessary" requirements to a future release, or whether to scale them down, or how and when to use workarounds can make a big difference in keeping costs, schedule, quality, and functionality in balance when scope creeps, or gallops away, during a project.

This presentation will review the need for QA and Testing professionals to keep pace with the moving target of what the client wants – and provide insights into how project managers can help QA and Testing professionals keep pace with the change.

"The Curse of the Moving Target" painted by Peter van Oostzanen © 2000