PMP® 12e Glossary of Terms

Key terms from PMP® Exam Prep, 12th Edition

How to use this glossary

This glossary contains 739 terms, listed alphabetically. The term index that follows lists every term. Click any term in the index to jump directly to its definition. Click a letter heading in the glossary to return to the index.

Each definition ends with a chapter and page reference to PMP Exam Prep, 12th Edition. For example, CH 7, pp. 253, 257 means the term is discussed in Chapter 7 on pages 253 and 257. Terms that appear in more than one chapter list each chapter separately.

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Plan Sourcing Strategy

Plan Stakeholder Engagement

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8-Step Process for Leading Change A change model published by John Kotter in 1995 that focuses on a top-down approach for the management of medium- to large-sized organizations. The model encourages leaders to generate enthusiasm for the change by communicating the vision and identifying company change leaders to influence impacted stakeholders. *CH 12, pp. 465, 472*

A

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AC (actual cost) As of today, what is the actual cost incurred for the work accomplished? AC looks backward at what has actually been spent on the project to date. *CH 7, pp. 253, 257, 259, 263, 266-268, 271*

Accelerated depreciation A method of depreciation that depreciates an asset faster than straight-line depreciation. The two common forms are double declining balance and sum of the years' digits. *CH 3, p. 81*

Accept A risk response strategy for threats and opportunities. Passive acceptance means to do nothing, leaving actions to be determined as needed (workarounds) if the risk occurs. Active acceptance involves creating contingency plans to be implemented if the risk occurs and allocating time and cost reserves to the project. *CH 10, pp. 376, 393, 404*

Acceptance criteria Conditions that must be met for a deliverable to be accepted by the customer. Documented in requirements documentation to ensure work results conform to requirements and avoid misunderstandings. *CH 5, pp. 172-173, 204*

Acceptance test–driven development (ATDD) A story breakdown approach in which acceptance tests are built before the story is built, and the story is then built to pass the test. *CH 5, p. 187*

Active acceptance A form of the accept response strategy that involves creating contingency plans to be implemented if the risk occurs and allocating time and cost reserves to the project. *CH 10, p. 393*

Active listening A listening technique in which the receiver confirms they are listening, accurately reflects back on the speaker's remarks, expresses agreement or disagreement, and asks for clarification as necessary. *CH 9, pp. 330-331, 359, 370*

Activity standard deviation (SD) Standard deviation (SD) represents the amount of variability or uncertainty in an activity estimate. When multipoint estimating is used, the difference between the optimistic estimate (O) and the pessimistic estimate (P) reflects the possible spread of outcomes for the activity. The standard deviation formula σ=(P-O)/6 provides a simple way to approximate how much the actual duration or cost might vary around the expected value. A larger standard deviation indicates greater uncertainty, while a smaller value suggests the estimate is more predictable. *CH 6, p. 222*

Adaptive change management In adaptive and hybrid environments, change control is streamlined because there are often many changes to evaluate and make decisions about every day. The product owner is part of the team and has

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much change approval authority. They will authorize changes that would not significantly alter the outcome or benefits of the project. Changes that would impact the intended benefits or require more time or budget than tolerances allow still need to be escalated outside the project to a steering committee or sponsors for approval. However, everyday decisions and minor changes that come with building something new or complex are managed within the team. *CH 4, p. 141*

Adaptive constraints model A model that inverts the predictive triple constraint. In adaptive delivery, time and cost are the fixed variables: the customer and organization agree on a team size and delivery timeline at the project's start, and these are commitments. Within those fixed parameters, scope is the flexible variable. The product owner continuously prioritizes the backlog, building the highest-value features first. At any iteration boundary, scope can be added, removed, or re-ordered as long as the team's capacity and the timeline hold. Success in adaptive delivery means delivering the maximum value possible within fixed time and cost. *CH 13, pp. 487-488, 498-501*

Adaptive estimating The cost and effort estimation practices used on agile and hybrid projects, where full scope is not defined at the outset and planning happens progressively. Instead of building one detailed bottom-up estimate for the entire project, adaptive teams estimate iteratively, often using relative units such as story points rather than hours or dollars. Techniques such as Planning Poker®, affinity estimating, and t-shirt sizing allow teams to quickly gauge the relative size and complexity of work items without over-investing in precision too early. Because adaptive projects typically operate within a fixed budget and fixed timeline while allowing scope to emerge, the emphasis shifts from predicting a final cost to spending the available budget on the highest-value work first. *CH 7, p. 260*

Adaptive Focus An icon that marks where adaptive concepts are addressed in the book. Use it to quickly find where adaptive thinking and practices are explained, compared, and applied in exam-style situations. The exam expects the project manager to recognize when adaptive practices fit and when they do not. *CH 1, p. 12*

Adjourning The final stage of Tuckman's ladder model of team formation, in which the project ends and the team is disbanded. *CH 9, pp. 336-337*

ADKAR Model A change model developed by Jeff Hiatt in 2006 after studying changes in over 700 organizations. ADKAR stands for Awareness, Desire, Knowledge, Ability, and Reinforcement—the five steps an individual goes through to adapt to change. The model helps change management professionals develop communications and activities for impacted stakeholders at each stage of their journey. *CH 12, pp. 465, 472*

Affinity diagram A graphic technique that groups requirements generated from other gathering methods by similarities. Makes it easier to identify additional areas of scope not yet identified. *CH 5, pp. 167-168; CH 4, pp. 127, 146*

Affinity estimating A rapid technique for sizing a large backlog without discussing each story individually. It relies on team intuition and relative comparison—teams can typically size 20–50 stories in under an hour using this approach. Team members silently move stories into relative size groups (smallest to largest) without talking; once the initial sort is complete, the facilitator reads any stories that were moved more than once or placed in different categories; the team briefly discusses only the disputed stories, then resolves placement; and size labels (story points or t-shirt sizes) are applied to each group. *CH 6, pp. 223-224; CH 2, pp. 55, 62*

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After-action review (AAR) An analysis conducted during project closing in which the project manager and team analyze how the project went by answering: What was supposed to happen? What actually happened? Why were there differences? What can we learn? The findings are documented in the lessons learned register. An AAR is a post-event performance review with captured lessons to reuse more broadly, whereas a retrospective is an iteration-by-iteration team process improvement. *CH 4, pp. 142, 147*

Agile coach A servant leader whose responsibility is to ensure that the adaptive methods and processes to be used on the project are understood and followed, and to help the team by removing impediments to building and delivering the product of the project. The agile coach is also a member of the team, where everyone is collectively responsible for all stages of the project and for the building and delivery of the product. *CH 3, pp. 87-88; CH 1, p. 26*

Agile definition of done An agile practice that ensures a common understanding of what 'done' means for each story, for all stakeholders—team and customer alike. Each story on an agile project must have a definition of done. It is important to stakeholder engagement because it establishes shared expectations about completion criteria before work begins. *CH 8, p. 314*

Agile Manifesto A document produced in February 2001 by seventeen software practitioners that states four core values and twelve principles for adaptive software delivery. The Manifesto is the foundational philosophical statement of the adaptive approach. Its four values are expressed as 'A over B' priority pairs: Individuals and interactions over processes and tools; Working deliverables over comprehensive documentation; Customer collaboration over contract negotiation; Responding to change over following a plan. Both sides of each value pair have value; the 'over' is a priority statement, not an elimination. *CH 13, pp. 474, 487, 490, 492, 501*

Agile meetings (events) The agile (or Scrum) ceremonies—daily coordination meeting, iteration review, and iteration retrospective—viewed from a quality perspective: they provide a way for issues to be found early in the product life cycle. Asking “Are there any impediments to the project work?” in the daily coordination meeting surfaces potential problems before they impact quality or schedule; the project manager investigates and resolves any concern raised once the meeting is over. *CH 4, pp. 130-131*

Agile mindset The internalized set of values and beliefs that shapes how a practitioner responds instinctively to the challenges of adaptive work: uncertainty, change, failure, ambiguity, and the constant tension between delivering now and delivering right. The agile mindset goes beyond knowledge of frameworks and principles; it is the disposition that causes a practitioner to act on those principles even under pressure. *CH 13, pp. 476, 492*

Agile modeling A set of product modeling practices used to facilitate communication and shared understanding between the team and the customer. Product modeling types include use case modeling, process models, low-fidelity prototypes, wireframes, and high-fidelity prototypes. The emphasis (except for high-fidelity prototypes) is not on the exactness of the model but on the communication between the team and customer as they create the model together. *CH 8, p. 315*

Agile project management office (agile PMO) A PMO that supports an adaptive way of working. Agile environments sometimes have a value delivery office that is focused on the outcomes and flow of value. *CH 3, p. 75*

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Agile release planning The collaborative process in which an agile team defines the scope, features, and timeline of an upcoming release, typically spanning multiple sprints. Mid-level detailing is expected, something between the high-level ideas outlined in a roadmap and the lower-level details decided in sprint planning. *CH 6, pp. 209, 212, 237, 244, 247; CH 2, pp. 41-42, 54, 57, 61-62; CH 5, pp. 162-163, 175, 184*

Agile Release Train (ART) SAFe®'s defining organizational concept. A group of 5–12 agile teams aligned to a common mission, working together in a coordinated Program Increment (PI) cadence. The Release Train Engineer (RTE) is the servant-leader for the entire ART, facilitating PI planning events, removing cross-team impediments, and keeping the program on track. *CH 13, pp. 488-489, 491, 495*

Agile scope decomposition The progressive elaboration of product features in adaptive projects: high-level epics are decomposed into features, then into user stories, and finally into detailed tasks (unit tests, acceptance tests, business rules). Done iteratively at the last responsible moment. *CH 5, pp. 178, 184-186*

Agreements The broader term that includes documents or communications that outline internal or external relationships and their intentions. A contract is a type of agreement, but an agreement is not necessarily a contract. Examples of agreements that are not contracts include the project charter and plan documents, internal service level agreements, memos or letters of intent, letters of agreement, emails, and verbal agreements. *CH 11, pp. 414-415, 423, 426, 432, 444*

Alternative dispute resolution (ADR) Methods used to manage contract conflicts and avoid or resolve disputes without full litigation. Common ADR methods include negotiation, mediation, arbitration, dispute review boards, and expert determination. Project managers should try to resolve disputes using less formal options first and escalate to more formal options only when needed. *CH 11, pp. 435, 444*

Alternatives analysis A technique used to evaluate which action would best impact project quality results. For example, it could be used to determine whether a new automated testing tool would be more beneficial than redefining the testing process. *CH 4, pp. 128, 147*

Analogous estimating A technique that uses expert judgment and historical information to estimate time, cost, and resources. It is usually not considered definitive and is typically used when limited detailed information is available about the current project, but historical data from similar or analogous projects exists. *CH 6, pp. 219-220*

Appreciative inquiry A communication method, listed among the important communication methods and concepts used throughout the project (with active listening, communications technology, feedback, meetings, presentations, and retrospectives), that focuses conversations on strengths and what is working well in order to build on them. *CH 3, p. 86*

Approaches Project management approaches are described predictive, adaptive, or hybrid. A predictive approach may also known as predictive or traditional. An adaptive approach may also be known as agile or change-driven. *CH 1, pp. 6-10, 26, 28, 31, 34*

Arbitration A more formal dispute resolution method in which an arbitrator—which could be a panel—hears both sides of a dispute and makes a decision. The decision is often binding, depending on the agreement. *CH 11, pp. 422, 435-436*

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Architectural spike A type of time-boxed spike, originating in eXtreme Programming (XP) but used across all types of agile teams, that investigates a technical approach or new technology to answer whether a proposed solution will work or how it should be built. Used as a risk mitigation technique when new technology, an unknown integration, or a performance concern must be validated before committing to an iteration. *CH 13, p. 485; CH 10, pp. 377, 398, 401, 403, 409*

Artifacts All of the documentation and other useful organizational assets project managers use on a project, keep updated, and leave behind from a properly managed project. *CH 2, pp. 58, 60*

Artificial intelligence (AI) Technology that enables machines, such as computers, to perform tasks that normally require human thinking or perception. Examples include analyzing data, recognizing patterns, summarizing information, generating text or reports, identifying risks, and supporting decisions. On projects, AI is treated like any other tool the team uses. The project manager is responsible for ensuring it is applied appropriately and ethically:

- governing its use
- having the team validate AI-generated output, which should be treated as a draft
- protecting sensitive project data
- communicating with stakeholders about its use

AI is one of two emerging trends, along with sustainability, that PMI added to the 2026 PMP ECO. It is not a separate domain or task on the exam; it appears as context in scenario-based questions. See also generative AI (GenAI) and large language model (LLM). *CH 1, p. 10*

Assignable cause / special cause variation A data point, or series of data points, on a control chart that signifies the process is out of control and requires investigation to determine the cause of the variation. The project manager may use additional tools, such as a cause-and-effect diagram, to uncover the root cause. *CH 5, p. 193*

Assignment A terms-and-conditions clause that refers to the circumstances under which one party can assign its rights or obligations under a contract to another party. *CH 11, pp. 424, 426*

Assumption log An artifact created during the development of the project charter that records assumptions and constraints identified during project initiating. The assumption log is updated throughout the project as assumptions and constraints change and new assumptions are uncovered. *CH 4, pp. 106-107, 109, 119, 124, 146-147; CH 3, p. 83*

Assumptions Expectations that may not be entirely based on fact. Stakeholders may not realize they are making assumptions and therefore may not articulate them when communicating their requirements. Incorrect assumptions introduce risk to the project, so they must be identified and managed by the project manager. *CH 3, pp. 83, 85, 91-94, 99*

Assumptions and constraints A tool used in stakeholder engagement planning. Analysis evaluating assumptions about stakeholders' attitudes toward the project enables the team to determine actions needed to adjust levels of engagement. Analysis of project constraints can provide insight into determining strategies to adjust stakeholders' levels of engagement. *CH 8, p. 295*

Audits A quality assurance technique in which a team (often from the quality department) examines whether the project is complying with company standards, policies, and procedures as defined in the quality management plan, and

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determines whether those being used are efficient and effective. A quality audit looks for new lessons learned and effective practices that the project can contribute to the performing organization. *CH 4, pp. 129, 146*

Augmented reality (AR) An advanced technology used in resource estimating in the same way as virtual reality (VR) but with team members using a tablet, phone, AR headset, or similar device to create digital models and assess resource needs and constraints. *CH 9, pp. 351, 367*

Autonomy One of three intrinsic motivators identified by Daniel Pink. Autonomy appeals to the desire people have to direct their own lives. Examples include flexible work hours, working from home, and influence over project assignments. *CH 9, p. 332*

Avoid A risk response strategy for threats that eliminates the threat by eliminating the cause. Examples include removing a work package or changing the person assigned to do work. Avoiding a threat might even involve expanding the scope of the project. On an overall project level, if the threat is beyond the organization's risk threshold, avoidance could include removing pieces of the project that are too risky or canceling the entire project. *CH 10, p. 391*

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BAC (budget at completion) How much was budgeted for the total project effort? BAC refers to the project's currently approved budget (the cost baseline). It is a known quantity indicating what the end cost of the project would be if everything went according to plan. BAC looks forward to the project. *CH 7, pp. 266-270*

Backbone In a story map, the backbone shows epics (or high-level activities or features) in the order the user would do them. *CH 6, p. 236*

Backlog An agile artifact that shows all of the work that must be completed for the project. The product owner continuously reprioritizes the backlog to reflect customer priorities, ensuring that the top work items deliver the most value. *CH 5, pp. 152-153, 159-163, 175; CH 13, pp. 475, 480, 483-484, 493-497; CH 6, pp. 211-213, 237, 241-243*

Backlog management A technique used to manage changes in adaptive projects. The product owner keeps the product backlog current by adding or removing items, prioritizing or reordering items by value, and incorporating new information, dependencies, and constraints. Also referred to as backlog grooming. *CH 4, pp. 123, 147*

Backward pass A technique in which the "late start" and "late finish" time frames are calculated from the End to the Start of the project, following the dependencies in the network diagram. It is one of the steps in identifying the critical path and scheduling the project. *CH 6, pp. 227-228, 250*

Balanced matrix A form of matrix organization in which power is shared equally between the functional manager and the project manager. *CH 3, p. 73*

Baseline Also known as the project baseline or performance measurement baseline of a project; this includes the scope baseline, cost baseline, and schedule baseline. These are the initial definitions of the project constraints and must be

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continually updated throughout the project. In an agile project, the scope baseline is the backlog. *CH 4, pp. 111, 113-114, 117-118, 134-136; CH 6, pp. 209, 211-213, 226, 239; CH 7, pp. 259-265*

Basis of estimates Supporting documentation that accompanies cost estimates and explains how each figure was developed. It records the estimating method used, the assumptions and constraints that shaped the numbers, the data sources consulted, the confidence range of the estimate, and any risks or exclusions identified by the estimator. The basis of estimates serves two practical purposes: it allows stakeholders to evaluate the credibility of the estimate, and it creates an organizational record that makes future projects easier and more accurate to estimate. *CH 7, pp. 259, 261, 272-273, 275*

Benchmarking A requirements elicitation technique that measures an organization's performance against other organizations in the same industry. Can be time-consuming and costly, and may inhibit creativity by focusing on existing solutions rather than innovation. *CH 5, pp. 165, 202*

Benefit-cost ratio The calculated result of a cost-benefit analysis, expressed as a decimal or a ratio. A benefit-cost ratio greater than 1 means the benefits are greater than the costs; a ratio less than 1 means the costs are greater than the benefits; and a ratio of exactly 1 means the costs and benefits are equal. *CH 3, p. 79*

Benefits management plan A plan that defines how benefits will be tracked and measured after project delivery. Examples may include metrics such as the number of people benefiting from a service, the number of books checked out, and community survey results, with re-evaluation planned at defined intervals to assess success and identify additional needs. *CH 2, pp. 47-48; CH 3, p. 66; CH 4, p. 146; CH 7, pp. 259, 275; CH 8, pp. 285, 321; CH 11, p. 426*

Benefits realization The process of ensuring that project outputs lead to outcomes that create measurable value for the organization and stakeholders. *CH 12, pp. 448-449, 472*

Bid documents Documents sent to prospective sellers that describe the buyer's needs, explain how to respond, and specify the criteria the buyer will use to select a seller. Well-designed bid documents improve response quality, enable fair comparison of sellers' responses, reduce ambiguity, and decrease the likelihood of future disputes. *CH 11, pp. 426-430, 440, 444*

Bidder conference A meeting in which the buyer carefully controls communications with prospective sellers to ensure legal integrity, fairness, and consistency. All prospective sellers' questions are documented and sent to all prospective bidders—along with subsequent responses—to ensure everyone has the same information. The project manager must watch for collusion among sellers, sellers not asking questions in front of the competition, and must ensure all questions and answers are issued in writing to all potential sellers as addenda to the bid documents. *CH 11, pp. 428-430, 442, 444*

Bottom-up estimating An estimating approach based on detailed project and deliverable analyses. Individual activity-level estimates are aggregated upward through the work breakdown structure to produce a total project cost estimate. Bottom-up estimating is more accurate than top-down estimating but requires that the project be well defined and understood, and takes relatively more time and money to produce. *CH 7, pp. 253, 258, 260, 275; CH 6, p. 220*

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Brainstorming A requirements elicitation technique where participants share and build on each other's ideas. No evaluation happens during idea generation; afterward, ideas are evaluated and ranked using techniques like the nominal group technique or multicriteria decision analysis. *CH 5, pp. 165-166, 171, 202*

Branch and bound A complex method that involves using integers to break down a schedule (or branch it) into smaller pieces, then to bound them in order to explore the best way to sequence tasks in order to complete a project. It is a structured way to search through many possible solutions without having to check every single one. *CH 6, pp. 242, 248*

Breach/default Occurs when any obligation of a contract is not met. A breach by the seller cannot be remedied by a breach by the buyer. A breach is an extremely serious event, and the response must always be to issue a letter formally notifying the other party of the breach, as failure to send an official notice of breach could cause the project manager's company to lose its right to claim breach later. *CH 11, p. 424*

Budget estimate A refinement from a rough order of magnitude (ROM) estimate, typically in the range of −10 to +25 percent. The range is narrowed from ROM before reiterating the budget. *CH 7, p. 260*

Build-and-feedback loops A key adaptive concept in which continuous stakeholder feedback drives iteration priorities. At every iteration, the team demonstrates the increment to stakeholders. Stakeholders provide feedback that directly shapes the next iteration's priorities. This loop—build, show, get feedback, reprioritize—runs throughout the entire project, not just at formal milestones, continuously moving the product toward what stakeholders actually need. *CH 13, p. 493*

Burn rate A common business metric referring to the rate at which an entity—in this case an agile team—is using (or losing) money. Stable adaptive teams tend to have consistent burn rates, which simplifies cost estimating. Burn rate, combined with velocity, can help anticipate future budgetary issues. *CH 7, pp. 262-263, 277-278*

Burndown chart A chart that tracks the work remaining to be done on a project. As work is completed, the progress line moves downward to reflect the amount of work that still needs to be done. Burndown charts are commonly used to measure the team's progress in completing project work. *CH 6, pp. 208, 237-238, 241-242, 244, 248; CH 9, pp. 363-364*

Burnup chart A chart that tracks the work that has been completed as well as the total size of the backlog scope. Over the course of the project, the progress line moves upward to show the increasing amount of work completed. The advantage of a burnup chart is that it can show changes in scope, making the impact of those changes visible. *CH 6, p. 238; CH 9, pp. 363-364, 368*

Business case A document that captures the reasons the organization selected the project, including intended deliverables, outcomes, goals, objectives, benefits, and value. The business case must remain valid throughout the project; when external or internal changes threaten its validity, those changes must be surfaced promptly, assessed, and acted on through governance. *CH 3, pp. 66, 81, 83, 92, 98-99; CH 12, pp. 455, 459-460, 468-470*

Business documents Documents created before the project begins, primarily the business case and the benefits management plan, that explain why the organization selected the project and the benefits it expects to gain. They feed into the project charter and guide project management activities to ensure the project remains worth the investment and returns the expected benefits. *CH 2, p. 48; CH 4, pp. 118, 146; CH 8, p. 285*

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Business environment All internal and external factors—culture, strategy, regulations, market forces, and stakeholders—that influence a project and its ability to deliver compliant, valuable outcomes. *CH 12, pp. 446-447, 449-453, 460, 469, 472*

Business Environment domain One of three performance domains in the Examination Content Outline (ECO); covers understanding the organization in which the project manager works and the internal and external environments in which it does business. Understanding business and environmental factors is critical to accomplishing project objectives. Approximately 26% of the exam is based on the Business Environment domain. *CH 2, pp. 37-38*

Business value The net quantifiable benefit derived from a business endeavor. The benefit may be tangible, intangible, or both. *CH 3, pp. 66-67, 88-89, 98-99*

Buyer The company or person who purchases goods or services. Many companies are a buyer in one procurement and a seller in another. For exam purposes, assume the project manager is the buyer. *CH 11, pp. 415, 419, 421, 425, 431, 433*

C

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Capacity buffer In the Critical Chain Method, a buffer that sets on-call resources in case of unforeseen issues. *CH 6, p. 232*

Capital expenses (CapEx) Indirect costs associated with building or technology investments. CapEx is one category of costs that may or may not be directly attributable to a single project and may be included or excluded from project cost estimates depending on organizational policy. *CH 7, pp. 256-257*

Cause-and-effect diagrams Specific types include fishbone, Ishikawa, or Why-Why diagrams. A quality tool used by a team to confirm that policies and procedures are being followed and metrics are being used correctly, and that the procedures were adequate to produce the required level of quality in project deliverables. The tool maps a defect on the right and lists various possible causes to identify the root cause. Also used to support root cause analysis. *CH 4, pp. 126, 128, 146*

Centralized contracting environment A contracting structure in which there is one procurement department. The procurement manager reports to the head of the procurement department and may handle procurements on many projects. The project manager contacts the procurement manager or department when they need help or to ask questions and knows what authority the procurement manager has in each situation. *CH 11, p. 416*

Centralized management and leadership A leadership approach in which teams report to one leader, such as the project manager, who holds decision-making authority. *CH 9, p. 368*

Change control The process of managing changes within the project, ensuring that changes to the project are necessary and carried out systematically using defined governance (decision rights, approvals, and escalation paths). If change is not managed properly on projects, it will have negative effects on the project and thus on the organization. *CH 12, pp. 454, 463-464, 466, 468-471*

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Change control board (CCB) A formally established group responsible for reviewing change requests in accordance with the change management plan for the project. The CCB (sometimes referred to as the steering committee) approves, defers, or rejects changes. The results of these decisions are documented in the project's change log. The board may include the project manager, the customer, experts, the sponsor, functional managers, and others. *CH 4, p. 139*

Change management (organizational change management, OCM) The discipline of facilitating change effectively in an organization. Used in project management to ensure project outputs are adopted effectively within the model that all organizational projects are change initiatives and enact change in an organization. OCM focuses on aligning people, processes, and systems so that intended value and benefits are realized while maintaining compliance. *CH 12, pp. 449-450, 454, 464-465*

Change management plan A component of the project management plan that describes how changes will be managed and controlled. It may include: an outline of how changes will be managed and controlled; change control procedures (how and who); approval levels for authorizing changes; the creation of a change control board to approve changes as well as the roles and responsibilities of those on the board; who should attend meetings regarding changes; the organizational tools to use to track and control changes; information on reporting the outcome of change requests; and the emergency change process. *CH 4, pp. 113, 117, 136, 139-140, 143, 145*

Change requests Formal requests to modify any project artifact. Change requests can result from additions to project scope requested by the customer, changes to the plan that the team believes would make their work more efficient, or changes to the policies and procedures used on the project. The three main categories into which changes fall are corrective action, preventive action, and defect repair. *CH 4, pp. 128, 135, 137, 146-147; CH 6, pp. 213, 234, 239-240, 243, 247-249*

Checklists A quality tool used to confirm that the steps of a process have all been completed. Also used to analyze defects discovered in quality inspections, to look for issues within the process, and to assess whether a deliverable meets the acceptance criteria. *CH 4, pp. 126, 129, 131, 146*

Checksheets A type of checklist used to keep track of data such as quality problems uncovered during inspections and to document how often a particular defect occurs. Used in controlling quality. *CH 5, p. 190*

Claim An assertion by the seller that the buyer did something that has harmed the seller and that the seller is now seeking compensation for. A claim is a type of seller-initiated change request and is usually addressed through the contract change control system. The best way to settle claims is through negotiation or the use of the dispute-resolution process specified in the contract. Many claims are not resolved until after the work is completed. *CH 11, pp. 435-436, 438-439*

Close Project or Phase A Focus Areas Model process in the Closing focus area that finalizes all activities across tasks and processes to formally close the project or phase and transition the product to the customer or operations. Activities include getting formal final acceptance, completing financial and procurement closure, issuing a final performance report, issuing final lessons learned, and indexing and archiving all project records. *CH 4, pp. 103-104, 141-143, 147*

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Closing The focus area that includes collecting and finalizing all the artifacts needed to complete the project, and the technical and administrative work to confirm that the final product of the project is accepted. Closing also includes transferring the completed product to those who will use it and soliciting feedback from the customer about the product and the project. *CH 2, pp. 39-44, 47, 53-54, 58*

Closing procurements The process of formally completing a procurement by tying up all loose ends, verifying that all work and deliverables are accepted, finalizing open claims, and achieving financial closure (ensuring payment). The buyer formally notifies the seller that the contract has been completed. Some obligations, such as warranties, may continue after the procurement is closed. Procurement closure must be done more formally than project closure to protect the legal interests of both parties. *CH 11, pp. 437, 439*

Coaching A team-development practice whose goal is to help team members stay on track, overcome issues, continually improve their skills, and achieve their goals. Coaching is done at two levels—with the team and with individual team members. Individual coaching sessions should be confidential meetings in a safe environment. *CH 9, pp. 336, 359, 368-369*

COCOMO (constructive cost model) A structured approach to estimating the effort, schedule, and cost of software development projects. COCOMO models use inputs like source lines of code or function points, along with adjustment factors, to predict development costs. By analyzing data from many completed projects, these models provide a reliable way to estimate future software project costs. *CH 7, p. 258*

Collaborating (problem-solving) A conflict resolution technique in which the parties openly discuss differences and try to incorporate multiple viewpoints to arrive at a consensus. Collaboration leads to a win-win situation and is generally the preferred approach. *CH 9, pp. 339, 344*

Collective code ownership An eXtreme Programming (XP) practice in which any team member can improve any part of the codebase. Everyone is responsible for the whole product, eliminating knowledge silos and enabling any team member to work on any area of the code. *CH 13, pp. 485, 497*

Colocation The practice of arranging for the entire team in each city to have offices together in one place or one room. Colocation improves communication, decreases the impact of conflict (because all parties are present), and improves project identity for the project team and for management in a matrix organization. Adaptive development approaches encourage colocation. *CH 9, pp. 354, 358, 360, 368; CH 3, p. 73*

Commitment (Situational Leadership II®) In Blanchard's Situational Leadership II® model, the confidence and motivation a person has for a given task. Commitment is task-specific and not a fixed personality trait. *CH 9, pp. 334, 336, 359, 366*

Common vision A shared understanding among the project manager, team, sponsor, and key stakeholders of the project's purpose, goals, and expected outcomes. Developing a common vision is one of the first and most important responsibilities of the project manager. Without this alignment, stakeholders may pull in different directions, leading to misunderstandings, scope creep, and dissatisfaction. The project elevator statement is a practical tool for establishing and promoting a shared vision. *CH 8, pp. 282, 286, 290-291, 323-324*

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Communication blockers Factors that cause miscommunication and can lead to disagreement and confusion, ranging from a lack of cultural sensitivity to a failure to provide concise messages. Examples include noisy surroundings, distance between communicators, improper encoding of messages, language challenges, and cultural differences. *CH 9, pp. 331, 342, 357, 362*

Communications management plan One of the key individual management plans within the overall project management plan. It defines what information needs to be communicated, to whom, when, by what method, and how frequently, ensuring that the right stakeholders receive the right information at the right time in the right format. It supports the organization's governance processes by establishing how project performance data, status updates, and decisions will flow to governance bodies and sponsors. It should identify existing systems and processes that support communications, specify who is responsible for sending information, and build in feedback loops so the project manager can confirm stakeholders have received and understood key messages. *CH 4, pp. 117, 120, 140, 144*

Communities of practice Groups that connect practitioners with shared interests across teams in an adaptive environment. Communities of practice are one of the key knowledge transfer mechanisms in adaptive delivery, distributing expertise and lessons learned beyond individual team boundaries. *CH 13, pp. 495, 497*

Competence (Situational Leadership II®) In Blanchard's Situational Leadership II® model, the combination of knowledge, skills, and abilities a person brings to a specific task. Competence is task-specific—someone can be highly competent in one area and a complete beginner in another. *CH 9, p. 336*

Complexity The dynamic interaction of moving pieces in a project that can amplify change, risk, and uncertainty. Projects are inherently complex because they include many interrelated parts, with interdependencies coming from the project's own characteristics and from the connected systems project managers work within: teams, technologies, governance structures, organizations, and the broader business environment. Complexity is not just "a lot of work." *CH 12, pp. 447, 449, 460, 465-466*

Compliance Everything the team must adhere to while delivering the work, including rules that apply to the product itself and rules that apply to how the work is done. Compliance requirements can come from laws and regulations, industry standards, contracts and agreements, organizational policies and procedures, governance requirements, project and product requirements, and ethics and professional conduct. Compliance means following the rules and meeting external or internal requirements. *CH 12, pp. 446-447, 451-455, 459*

Compromising (reconciling) A conflict resolution technique that involves finding solutions that bring some degree of satisfaction to both parties. This is a lose-lose situation, since no party gets everything. Compromising is generally considered second-best to collaborating. *CH 9, p. 339*

Conflict management The practice of addressing the root causes of conflict on a project. Conflict is inevitable, is not inherently bad, and is best resolved by those involved, possibly assisted by the project manager. The seven sources of conflict in order of frequency are schedules, project priorities, resources, technical opinions, administrative procedures, cost, and personality. *CH 9, p. 338*

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Constraints Factors that limit options on a project, such as schedule, finance, scope, quality, customer satisfaction, risk, and resources. Management directly or indirectly sets the priority of each constraint, and that prioritization is used to plan the project, evaluate the impact of changes, and prove successful project completion. *CH 3, pp. 77, 83-84, 92*

Constructive changes Changes that do not result from formal change requests, but instead occur when the buyer—through actions or inactions—limits the seller's ability to perform the work according to the contract. This can include over-inspection, failure to review documents or inspect deliverables on time, or directing the seller to perform certain work that falls outside the contract scope. Constructive changes can add costs and create claims. *CH 11, pp. 436-437, 443-444*

Context diagrams Also known as a context level data flow diagram. Used to define and model scope by showing the boundaries of the product scope and highlighting the product and its interfaces with people, processes, or systems. *CH 5, pp. 167-168*

Contingency plans The risk response plans the project manager has for specific risks; specific actions that will be taken if the opportunity or threat occurs. Contingency plans should be measurable so the project manager can evaluate their effectiveness. *CH 10, pp. 391, 394*

Contingency reserves Reserves that account for "known unknowns"—items identified during risk management. Contingency reserves are calculated and become part of the cost baseline. The project manager has control of the cost baseline and can approve use of the contingency reserves. A contingency reserve may only be used to handle the impact of the specific risk it was set aside for. *CH 10, pp. 395-396; CH 6, pp. 222, 226, 235*

Continuous improvement Continuously looking for ways to improve the quality of work, processes, and results. Includes approaches such as Total Quality Management (TQM) and Six Sigma. *CH 5, pp. 155, 157, 177, 189, 198, 203*

Continuous integration An eXtreme Programming (XP) practice in which code is integrated into the shared codebase frequently, often daily, after passing unit tests. This practice supports early defect detection and maintains the codebase in a continuously deliverable state. Automation tools are increasingly supporting continuous integration. *CH 13, pp. 478, 485, 495*

Contracting strategy A component of the sourcing strategy plan in which the project manager decides which types of agreements or contracts best match the project's approach and level of risk. It ensures that the source selection criteria and expectations for managing the vendor relationship align with what will be included in those agreements, such as service level requirements, acceptance standards, warranties, incentives or penalties, and compliance obligations. *CH 4, pp. 121, 146*

Contracts A formal written agreement, typically created with an external entity, and involving an exchange of goods or services for (usually monetary) compensation. A contract forms the legal relationship between entities, is mutually binding, and provides the framework for how a failure by one side will be addressed and remedied, in court if necessary. Contract types are chosen strategically to manage ambiguity and risk. *CH 11, pp. 415, 417-424, 427*

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Control charts Charts used to determine if process results are within acceptable limits. Show upper and lower control limits, the mean, and plotted data points. Used to detect when a process is "out of control" (e.g., rule of seven, assignable cause variation). *CH 5, pp. 192-193*

Corrective action Any action taken to bring expected future project performance in line with the project management plan. Corrective actions deal with actual deviations from the performance measurement baseline or other metrics. A realistic performance measurement baseline, including acceptable variances, is needed to determine when a variance has occurred and when corrective action is needed. *CH 4, pp. 124, 128, 133-136*

Cost aggregation The technique of rolling up individual, activity-level cost estimates through the project's work breakdown structure (WBS) until a total project estimate is reached (a form of bottom-up estimating). Adding contingency and management reserves to the aggregated estimate produces the full project budget. Cost aggregation gives the project manager a structured, traceable financial picture that connects every dollar in the budget back to a specific piece of deliverable scope. *CH 7, pp. 253, 260-261*

Cost baseline The approved, time-phased project cost estimate—calculated by aggregating all work package estimates plus contingency reserves—against which the project manager measures and reports cost performance. The cost baseline is the financial component of the performance measurement baseline (PMB) or project baseline. It does not include management reserves. Changes to the cost baseline must be made formally with approval. *CH 7, pp. 259-263, 266, 274-275; CH 4, pp. 102, 111, 114, 145, 147*

Cost budget The total financial authorization for the project, equal to the cost baseline plus management reserves. The cost budget represents the highest-level financial commitment for the project. *CH 7, pp. 261-262*

Cost forecasts An output of Monitor and Control Finances: the EAC, ETC (estimate to complete), and TCPI values that project where the budget will land if current performance continues or if specific corrective actions are taken. *CH 7, p. 272*

Cost of change The concept that the cost of making changes to a project rises over time while the ability to influence a design falls. Changes made later in the project—when the product has already been gradually built—are harder and more expensive to incorporate than those made earlier. This makes early and consistent stakeholder communication critical. *CH 8, pp. 280-281, 319; CH 4, pp. 129-131, 138*

Cost performance index (CPI) An earned value metric calculated as EV ÷ AC. CPI measures how efficiently the project is using its budget: the project is getting $___worth of work out of every $1 spent. A CPI greater than one means the project is under budget (efficient); a CPI less than one means the project is over budget (inefficient). *CH 7, pp. 267-271, 274, 277*

Cost variance (CV) An earned value metric calculated as EV − AC. CV measures the difference between the value of work completed and the actual cost incurred at a given point in time. A negative CV means the project is over budget; a positive CV means the project is under budget. *CH 7, pp. 266, 268, 275*

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Cost-benefit analysis A comparison of the expected costs of a project to the potential benefits it could bring the organization or its stakeholders. The analysis results in a calculated benefit-cost ratio, which can be expressed as a decimal or a ratio. *CH 3, pp. 79, 85, 100*

Cost-reimbursable (CR) contract A contract used when the exact scope of work is uncertain and costs cannot be estimated accurately enough to use a fixed-price contract. This type of contract provides for the buyer to pay the seller allowable incurred costs to the extent prescribed in the contract, plus typically an additional fee or award amount to allow for seller profit. With a cost-reimbursable contract, the buyer has the most cost risk because the total costs are unknown. The seller provides an estimate for planning purposes, but it is not binding. *CH 11, p. 420*

Crashing A schedule compression method that involves adding or adjusting resources while maintaining the original project scope. Crashing, by definition, results in increased costs. It trades time for money and may also increase risk. *CH 6, pp. 233-234*

Critical chain method A schedule method that focuses on resources and the availability of resources. Team members are asked to focus only on one task at a time and to avoid multitasking. The Critical Chain Method uses buffers instead of float. For the exam, critical chain methods include shared buffers and resource constraints to protect the project completion date, while critical path methods are focused on activities, dependencies, and task-level float, and assume resources are available. *CH 6, pp. 232, 247-248*

Critical path The sequence of activities that drives the project's earliest possible completion date. Activities on this path have zero total float, which means there is no built-in schedule flexibility—if a critical-path activity finishes late and the plan is not changed, the project is finished late. As the longest duration path through a network diagram, the critical path determines the shortest possible duration for the project. *CH 6, pp. 209, 226-227, 229, 232-234, 240*

Critical path method (CPM) A method that involves determining the earliest and latest times each activity can start, and the earliest and latest times each can be completed. CPM is focused on activities, dependencies, and task-level float, and assumes resources are available. *CH 6, pp. 227, 232*

Critical thinking A leadership skill that involves gathering unbiased information, responding logically without adding more emotion to the situation, resolving issues using analytical skills, analyzing data to address the issue and choose the right path, being aware of relationships and related patterns, and identifying when someone is off-base with their reasoning. *CH 9, pp. 326, 341, 343, 362*

CRUD (Create, Read, Update, Delete) An acronym for the list of things a programmer wants to allow a user to do with data; used as a method of functionally decomposing a user story (for example, breaking "Manage account" into create, read, and update stories). Candidates need only recognize the acronym for the exam. *CH 5, p. 187*

Crystal family of methodologies An agile framework family whose core premise is explicit tailoring based on two variables: team size and project criticality. Created by Alistair Cockburn, Crystal methods are named by color (Clear, Yellow, Orange, Red, Magenta), with each color corresponding to a specific combination of team size and criticality level. Criticality is rated by the consequence of a defect reaching production: Comfort (C), Discretionary Money (D), Essential

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Money (E), and Life (L). The higher the stakes and the larger the team, the more formal and disciplined the required process. *CH 13, p. 486*

Cumulative flow diagram (CFD) A progress-tracking tool introduced by Feature-Driven Development (FDD) that plots multiple workflow states (to-do, in-progress, review, done) as stacked bands over time. A healthy CFD shows all bands growing at roughly the same rate. A widening 'in-progress' band signals a bottleneck. A flattening 'done' band signals the team has stopped finishing work. CFDs are used to identify bottlenecks and flow problems that point-in-time metrics miss. *CH 13, pp. 481, 490, 495; CH 6, pp. 238-239, 244*

Current state The state the organization or its customers are in before a project begins, as distinguished from the future state the project is intended to deliver. *CH 12, pp. 449, 464-465, 471*

Customer-valued prioritization The product owner's practice of prioritizing the product backlog according to customer priorities. The product owner represents end users and integrates technical requirements and risks identified by the team to maximize value delivery. *CH 5, p. 198*

Cycle time A Kanban metric measuring how long one item takes from the start of work to completion (done). Used alongside lead time and throughput to forecast delivery and identify process problems. It is calculated with the formula WIP/Throughput. WIP is work in progress. Throughput is the average time it takes to complete the work (for example, the entire work of one iteration). *CH 13, pp. 481-482; CH 6, pp. 238-239*

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Daily coordination meeting A brief meeting designed to keep forward momentum during an iteration and to communicate so that everyone knows what everyone is doing and what impediments there may be to getting the iteration's work done. No troubleshooting is done; the project manager investigates identified impediments after the meeting. Participants answer three questions: What have you done since the last meeting? What are you working on today? Are there any issues or impediments to your progress? *CH 4, pp. 130-131, 146; CH 2, pp. 54, 57-58, 61-62; CH 6, pp. 237, 248; CH 8, pp. 301-302, 305-307, 323; CH 13, pp. 478, 482-483, 497*

Dashboard A visual data representation tool, often digital, that summarizes project status and performance information in a single view for stakeholders, such as red/amber/green workstream status, earned value summaries, burn rate, top issues, and risks needing attention. Project dashboards and information radiators give fast feedback and transparency; agile team leaders use them to communicate quickly, and on predictive projects they often supplement or replace formal written reports. *CH 3, p. 85; CH 4, p. 135; CH 8, p. 317; CH 13, p. 482*

Data analysis methods The category of methods used to examine and interpret project data, chosen according to the type of data and the depth of analysis needed. Examples include alternative analysis, assumptions and constraints analysis, branch and bound, cost-benefit analysis (IRR, payback period, ROI), decision tree analysis, document analysis, earned value analysis, expected monetary value, forecasting, performance reviews, predictive analytics, reserve analysis, root cause analysis, simulation, SWOT analysis, trend analysis, value-stream mapping, variance analysis, and what-if analysis. *CH 3, p. 85*

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Data gathering methods The category of methods used to collect input from stakeholders, including benchmarking, brainstorming, checklists, checksheets, cost of quality, interviews, market research, prompt lists, and questionnaires and surveys. *CH 3, pp. 84-85*

Data representation methods The category of methods used to represent or communicate data and the information produced by data analysis. Examples include affinity diagrams, cause-and-effect diagrams, control charts, flowcharts, hierarchical charts, histograms, logical data models, matrix diagrams/charts, mind mapping, probability and impact matrices, project canvas, project dashboards or information radiators, release maps, scatter diagrams, stakeholder engagement assessment matrices, stakeholder mapping/representation, and text-oriented formats. *CH 3, p. 85*

Data-driven decision-making An approach in which the project manager presents stakeholders with clear, relevant data—supported by analytical tools including artificial intelligence (AI), predictive analytics, and data visualization software—to turn raw numbers into meaningful insights. When stakeholders are presented with solid evidence and clear visuals rather than opinions, decisions happen faster and with greater confidence. *CH 8, p. 281*

Decentralized contracting environment A contracting structure in which there is no procurement department or procurement manager assigned. The project manager may be responsible not only for planning and managing procurement but also for conducting all work on procurements. There may be little standardization of procurement processes and contract language without a procurement department to regulate standards and improve knowledge in procurement management. *CH 11, p. 416*

Decision tree analysis A quantitative risk analysis technique in which the value of each branch is calculated (another application of expected monetary value) to show the best option to select. Decision trees consider future events, calculate expected value (probability multiplied by impact) in more complex situations, and involve mutual exclusivity. In a decision tree, the box represents a decision to be made, and the circles represent what can happen as a result of the decision. *CH 10, pp. 386, 388, 397, 405, 407*

Dedicated team A team configuration in which most team members work full-time and exclusively on the project and often report directly to the project manager. Most common in projectized organizations; can also be found in matrix organizations; least likely in functional organizations. *CH 9, pp. 354-355*

Defect cycle time The amount of time between when a defect was introduced and the time it was fixed. Tracking defect cycle time helps the project team keep the cost of change to a minimum. *CH 4, p. 131*

Defect repair Another way of saying rework. Defect repair may be necessary when a component of the project does not meet requirements. As with corrective and preventive actions, defect repair may be reviewed and approved or rejected as part of the Assess and Implement Changes process. *CH 4, pp. 114, 124, 134-136*

Defects Quality failures tracked by agile and hybrid projects to minimize the cost of change. Defect cycle time—the time from when a defect is introduced to when it is fixed—is monitored to minimize rework costs. *CH 5, pp. 190-191, 196*

Definition of "done" (DoD) Agile teams' specification of what "done" looks like at the project, release, and story levels. Ensures deliverables meet all agreed-upon quality and acceptance criteria before being considered complete. *CH 5, pp. 156, 162, 172, 200; CH 2, p. 57*

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Definitive estimate The most refined estimate range, produced as planning progresses. Some project managers use a range of +/−10 percent; others use −5 to +10 percent, depending on organizational requirements. *CH 12, p463*

Delegating (leadership style) A Situational Leadership II® style characterized by low direction and low support. Used when competence and commitment are both high. *CH 9, p. 336*

Deliverables The outputs of project work: the unique, verifiable products, services, or results, interim or final, that the project produces and hands to the customer or operations. Deliverables result directly from the work of the project manager and team, as distinguished from outcomes (what is accomplished with those deliverables). They are verified against requirements and acceptance criteria and serve as inputs to monitoring and controlling and to Manage Project Knowledge. *CH 2, pp. 44, 60; CH 5, pp. 153-155, 172-174; CH 4, pp. 123-124, 133*

Delivering incrementally A key adaptive concept in which adaptive teams build and deliver in the smallest increments that provide real, standalone value to the customer. Each increment must be useful and generate learning. The goal is to get something into the customer's hands as early as possible, collect feedback, and let that feedback shape what gets built next. Adaptive projects deliver something at the end of every iteration rather than everything at the end. *CH 13, p. 493*

Dependencies A description of how activities are connected in time: what must happen before something else can start or finish, where overlap is possible, and where a delay is unavoidable. *CH 6, pp. 208, 214-216, 218, 231, 234, 246*

Depreciation The loss of value over time of a large asset, such as equipment. Methods used to account for depreciation include straight-line depreciation and accelerated depreciation. *CH 3, pp. 80-81*

Design for X A quality assurance technique used to analyze variables and evaluate both the effectiveness of the quality management plan and the team's ability to meet objectives. The X can represent an attribute of quality, such as reliability, security, or serviceability. If the plan is not delivering the intended results in relation to the variable being analyzed, Design for X can help determine what changes are needed. *CH 4, p. 128*

Design improvement (Refactoring) An eXtreme Programming (XP) practice of continuously improving internal code structure without changing external behavior. Refactoring keeps the codebase maintainable and reduces technical debt, enabling the team to sustain delivery pace as requirements change. *CH 13, pp. 485-486*

Design of experiments (DOE) A quality technique that can quickly discover optimal conditions in which to produce a quality deliverable. Experimentation is done to determine statistically what variables will improve quality. DOE allows the project manager to systematically change the important factors in a process and see which combinations have an optimal impact on the project deliverables. It is a fast and accurate technique that can also be used to look for ways to deliver the same level of quality for less cost. *CH 4, pp. 107, 128*

Development approach The approach used to produce the project deliverables, ranging from plan-driven to change-driven. It is a component of the project management plan. *CH 4, pp. 111, 113, 123, 137*

Direct costs Costs that are directly attributable to work on the project. Examples include team wages, training, travel and recognition expenses, and project materials costs. *CH 7, pp. 256-257*

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Directing (leadership style) A Situational Leadership II® style characterized by high direction and low support. Used when competence is low and commitment is high—the enthusiastic beginner. *CH 9, pp. 336, 339*

Directions of influence A stakeholder grouping method based on the direction in which a stakeholder's influence flows relative to the project manager: upward (the sponsor, executive leadership, or governance bodies with authority over the project), downward (the project team, who carry out the work), outward (external stakeholders such as vendors, regulators, and the public), and sideward (peers such as other project managers and functional managers). Used alongside stakeholder mapping to plan engagement. *CH 8, pp. 279, 288*

Directive project management office (directive PMO) A PMO that provides project managers for different projects and is responsible for the results of those projects. All projects, or projects of a certain size, type, or priority, are managed by this office. A directive PMO has a high level of control over projects. *CH 3, p. 75*

Disciplined Agile (DA) A decision-making toolkit, now stewarded by PMI, rather than a single methodology. Instead of prescribing one way to work, DA offers a library of practices and helps a team choose the approach that best fits its context—being "goal-driven" rather than prescriptive. Its guiding phrase is that teams should deliberately choose their "way of working" (WoW), drawing from across the agile and lean landscape. *CH 13, pp. 480-481*

Discounted cash flow A project selection and financial analysis method (with payback period, ROI, IRR, and NPV) that evaluates future cash flows in today's money. *CH 4, p. 121; CH 7, p. 256*

Discretionary dependency (preferred, preferential, or soft logic) A type of dependency where there are other ways the work could be done, but this is the approach the organization has chosen to perform the work. Discretionary dependencies are the most flexible type, and they are important when analyzing how to compress the schedule to decrease the project duration (i.e., to fast track it). It is important to document discretionary dependencies in case they cause random total float values, which can limit scheduling options as the project progresses. *CH 6, p. 216*

Dispute review board (DRB) A panel of neutral experts established at the start of a project to help with dispute avoidance and to provide recommendations or decisions during the project when disputes arise. *CH 11, p. 435*

Distributed management and leadership A leadership approach in which the team follows the leadership of several individuals—for example, the project manager plus the project management team. The team may also be self-organizing, with no single person leading and responsibility shared. *CH 9, p. 328*

Document analysis A technique of reviewing existing documents to draw out information. It is a quality assurance technique that reviews testing results and other quality reports to identify ways the quality management plan and processes may not be supporting deliverables that meet quality requirements. *CH 8, p. 287; CH 4, pp. 128, 146-147*

Downward influence A direction of stakeholder influence referring to the project team, who carry out the work of the project. *CH 8, p. 288*

Dreyfus model of skill acquisition A model proposing that adults learn new skills through five stages: novice, advanced beginner, competent, proficient, and expert. Commitment evolves from detached to involved, decision-making shifts

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from analytical to intuitive, and perspective changes from none to experienced as the person moves through the stages. *CH 9, p. 334*

Dynamic Systems Development Method (DSDM) One of the earliest formal agile frameworks, predating the Agile Manifesto. DSDM is governed by eight core principles and is significant for two contributions to the exam: its principles are the clearest articulation of adaptive delivery values and align closely with the Agile Manifesto, and it originated the adaptive constraints model—the concept that in adaptive projects, time and cost are fixed while scope is the flexible variable. DSDM uses the MoSCoW method for prioritizing work and operates through a defined life cycle: pre-project feasibility, foundations phase, exploratory iterations, and engineering and deployment iterations. *CH 13, pp. 476, 487-488, 501*

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EAC (estimate at completion) What is the current expectation of the total project cost (a forecast)? EAC looks forward at the project and can be calculated in several ways depending on assumptions: (1) AC + Bottom-up ETC—used when the original estimate was fundamentally flawed; (2) BAC ÷ CPI—used when no variances from the BAC have occurred or when the project will continue at the same rate of spending; (3) AC + (BAC − EV)—used when current variances are thought to be atypical of the future; (4) AC + [(BAC − EV) ÷ (CPI × SPI)]—used when current variances are thought to be typical of the future and when project schedule constraints will influence the completion of the remaining effort. *CH 7, pp. 266-270, 272, 278*

Early and frequent risk reduction A key adaptive concept in which adaptive teams tackle the riskiest, most uncertain work first. XP spikes, proof-of-concept builds, and early prototypes are mechanisms for surfacing risk before it becomes a crisis. If a technology is wrong for an application, the goal is to discover that in iteration one, not iteration twelve. This approach is sometimes called 'failing fast' but is better described as 'learning fast,' since the cost of learning is always lower than the cost of late-discovery failure. *CH 13, p. 493*

Early termination An adaptive contract clause that allows the buyer to cancel the contract early, for a cancellation fee, if it is discovered the buyer no longer needs additional scope from the seller—for example, if the minimum viable product (MVP) is delivered and found to be sufficient. *CH 11, pp. 422, 438, 444*

Earned value (EV) A metric that gives the estimated value of the work that has actually been completed on the project to date. EV is used along with other metrics in earned value analysis to determine how well the project is doing compared to its performance measurement baseline (the scope, schedule, and cost baselines). In adaptive projects, EV reflects the story points for user stories actually completed by a given point in time. *CH 7, pp. 252-253, 266, 268-269, 274, 276, 278*

Earned value analysis (EVA) An analysis method that uses earned value and other metrics to evaluate how well the project is doing relative to what was planned to date. EVA is a data analysis method used to evaluate actual project performance against the entire performance measurement baseline (the scope, schedule, and cost baselines). EVA results indicate whether there are any potential deviations from the baseline and can be used to forecast future performance and project completion dates and costs. *CH 7, pp. 252-253, 266, 269; CH 11, pp. 434, 441*

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Earned value management (EVM) The practice of managing scope, schedule, and cost using earned value analysis to control the project. The results of EVM tell the project manager what changes, if any, are needed to complete all the project's scope on time and within budget. EVM is most useful when all three constraints (scope, schedule, and cost) are estimated in the project, making it most commonly used in predictive and some hybrid approaches. *CH 7, pp. 253, 266, 272*

Earned value report A type of project report that integrates scope, cost, and schedule measurements to assess project performance relative to baselines and variances. *CH 8, pp. 298, 304, 307*

Economic value added (EVA) A project selection measure that asks whether the project returns more value than it costs. EVA for project selection is different from earned value analysis (also known as earned value management), which shares the acronym EVA and is discussed in the Finance chapter. *CH 3, p. 80*

Emotional intelligence A set of interpersonal skills, associated with greater leadership success, describing the ability to perceive, evaluate, and control emotions in oneself and others. The four quadrants are self-awareness, self-management, social awareness, and relationship management. Emotional intelligence can be learned and developed. *CH 9, pp. 327, 338, 341, 344, 357, 363, 368*

Enhance A risk response strategy for opportunities (the reverse of mitigate) that increases the likelihood (probability) and/or positive impacts of the opportunity occurring. This can relate to the overall approach to scope and schedule, resources used, project replanning, or individual project risks. *CH 10, pp. 392, 408*

Enterprise environmental factors (EEFs) Factors outside the control of the project team that impact its work, including an organization's culture, technology, and external governmental standards, rules, and regulations. Internal EEFs include the structure, governance, culture, infrastructure, and geographic locations of the organization; resource-related EEFs include the technology and resources available for assignment to projects. *CH 3, pp. 66, 81-83, 86, 99-100; CH 1, p. 27*

Environmental and community stakeholders Stakeholders outside the organization who can affect or be affected by the project's environmental or community impact. These include regulatory agencies that issue environmental permits, advocacy groups representing affected communities, neighboring residents, and natural systems such as watersheds. Thorough stakeholder identification goes beyond the organizational chart to ask who is impacted by the consequences of the project. Their requirements and concerns must be captured, analyzed, and addressed in the stakeholder register. *CH 8, p. 318*

Environmental, social, and governance (ESG) Considerations that must be integrated into the project management plan rather than treated as a separate concern to be handled later. ESG considerations that are not planned for early carry the same risk as any other unaddressed requirement, becoming more expensive to incorporate the longer they are deferred. *CH 4, p. 144*

Environments A term used to describe project environments as either predictive, adaptive, or hybrid. It generalizes about the project management (or development) approach an organization tends to use, or is using, for a variety of projects at the present time. *CH 1, pp. 9, 14, 27-28*

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Epic In adaptive environments, a large body of work representing a big idea or major capability the product will deliver; the highest level of requirement (or story). Epics are captured during visioning and chartering, placed in the product backlog, and progressively elaborated into features and then user stories because they are too large and complicated to build without decomposition. *CH 5, pp. 175, 185; CH 6, p. 236*

Escalate A risk response strategy for threats and opportunities used when a risk is outside the scope of the project or beyond the project manager's authority. Escalated risks are typically managed at the program or portfolio level. An escalated risk needs to be accepted by the program or portfolio manager; the escalation is then documented, and the risk is no longer monitored at the project level. *CH 10, p. 392*

Escalation A governance mechanism used when issues cannot be resolved at the project team level. In many organizations, particularly hierarchical ones, certain decisions must be elevated to stakeholders with the authority to remove obstacles, resolve conflicts, and support continued project progress. *CH 3, pp. 71, 95-100*

ETC (estimate to complete) From this point on, how much more is the project expected to cost to finish? ETC looks forward at the project. It can be calculated as EAC − AC (total forecasted cost minus what has been spent to date) or by reestimating the cost of the remaining work from the bottom up. *CH 7, pp. 266-270, 272*

Examination Content Outline (ECO) PMI's document that defines the content areas on which the PMP® exam is based. The exam is designed to assess how the project manager applies project management concepts in realistic scenarios, according to PMI's current ECO. *CH 1, pp. 4, 7, 9-11, 13-15*

Executing The focus area in which the project team completes the project work as defined in the plan to produce the project deliverables (the product scope) at agreed quality levels, within the project's approved budget and schedule. This achieves the expected business value and agreed-upon benefits. *CH 2, pp. 39-44, 47, 51-52*

Expectations Mental pictures of the future held by stakeholders. They include what stakeholders think will happen to them, their department, and the organization as a result of the project, and what they want from the project that has not been articulated or made into requirements. Expectations may also include how stakeholders expect to be communicated with and included in ongoing project work. *CH 8, pp. 281-282, 284, 291-292, 300, 302, 323*

Expected activity duration (EAD) The result of the triangular distribution or PERT (beta) three-point formula, per organizational norms. Used with standard deviation to develop a confidence range for an activity estimate—from EAD − SD to EAD + SD—which supports schedule forecasting, risk analysis, and contingency planning. *CH 6, p. 222*

Expected monetary value (EMV) A quantitative risk analysis method used to estimate the impact of a risk by calculating the product of its estimated probability (as a percentage) times its estimated cost (as a dollar amount, should it occur): EMV = P × I. EMV estimates for risks are summed to calculate contingency reserves. For opportunities, EMV is presented as a positive amount; for threats, as a negative number. *CH 10, p. 387*

Expert determination An alternative dispute resolution method in which an independent expert is appointed to make a decision about a specific technical or financial dispute. *CH 11, p. 435*

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Expert judgment A common planning tool in which the project manager consults experts—often members of the team or others within the organization who have the expertise needed by the project—to obtain information. *CH 3, pp. 86-87, 93-94*

Explicit knowledge Fact-based knowledge that can be easily communicated through words and symbols. Traditional lessons learned, processes and procedures, and other information repositories fall under this knowledge type. Explicit knowledge is generated and shared as the project is ongoing and consolidated as part of project closing; however, it may need explanation or context to provide value. *CH 4, pp. 132-133*

Exploit A risk response strategy for opportunities (the reverse of avoid) in which the project manager adds work or changes the project to make sure the opportunity occurs. This can be at the individual project risk level or the overall project risk level. *CH 10, pp. 391-392*

Exploration spike One of the two types of spikes in eXtreme Programming (XP), also called simply a "spike": a timeboxed investigation of a business requirement or product design question—answering "What should this do?" or "Is this the right feature?"—used when requirements are unclear or multiple design options exist before the team can estimate work. Contrast with the architectural spike. *CH 13, p. 485*

External dependency A type of dependency based on factors relating to a party outside the project (for example, government hearings, supplier deliveries). These are usually outside the project team's control. *CH 6, pp. 216, 240*

eXtreme Programming (XP) An engineering-focused agile framework designed for environments where requirements change frequently. XP is built around twelve core practices, an active customer role, and a very short iteration cycle that ensures the codebase is always in a state that can absorb change. The customer's role in XP is unusually active: the customer defines acceptance tests before development begins, participates in iteration planning, and is available throughout the iteration to answer questions. *CH 13, p. 484*

Extrinsic motivation External motivation factors, such as salary, that (according to Daniel Pink) are limited and short-lived motivators. Once a person is fairly compensated for their work, extrinsic factors lose their motivating power. *CH 9, pp. 332, 342*

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Facilitation A technique that brings together stakeholders with different perspectives to define requirements using a consensus approach. Achieves general agreement about a decision; those preferring another option are willing to accept the majority decision. *CH 5, pp. 166, 202*

Failure analysis A type of root cause analysis that analyzes failed processes or failed components of deliverables to determine what led to failure. Corrective action or change requests are often outcomes of this analysis. *CH 4, p. 128*

Fallback plans Specific actions that will be taken if the contingency plans are not effective or are only partially effective. *CH 10, pp. 391, 394-395*

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Fast failure The desirable outcome of causing failure early (often through a spike) so that resources can be diverted to a different strategy or project. The team actively tries to cause the failure if they think there is a probability of it happening anyway, reducing the cost of failure by addressing it early in the project. *CH 10, pp. 377, 403, 406*

Fast tracking A schedule compression technique that involves taking critical path activities that were originally planned to be completed sequentially and doing them in parallel for some or all of their duration. Fast tracking often results in rework and usually increases risk because dependency requirements are ignored, and it requires more attention to communication. *CH 6, pp. 233-234*

Feasibility (agile process) Feasibility consists of establishing the business case (cost-benefit analysis, expected ROI, and other value metrics), creating the product and project vision (an "elevator pitch" describing the project, its product, benefits, and value), and documenting high-level features. *CH 2, p. 55*

Feature A medium-level unit of product functionality in adaptive scope decomposition. Features are created from large, complex, high-level requirements (epics) and are in turn sliced, or decomposed, into smaller user stories that the team can estimate and build. Features are prioritized in the product backlog and mapped to releases in the release plan. *CH 5, pp. 175, 185; CH 2, pp. 57, 61; CH 6, p. 236*

Feature-Driven Development (FDD) An agile framework that organizes the entire project around delivering client-valued features. FDD starts with building a high-level domain object model of the system, which informs a feature list organized by subject area. Planning, design, and build activities are organized entirely around features. FDD introduced the cumulative flow diagram (CFD) and parking lot diagrams, both of which have been widely adopted across other agile frameworks. *CH 13, pp. 476, 489-490, 501*

Feeding buffer In the Critical Chain Method, a buffer that sets time at the end of non-critical chains (paths) to prevent delays to the critical chain (path). *CH 6, p. 232*

Financial management plan A component of the project management plan (an output of Plan Financial Management) that identifies how to plan, manage, monitor, and control project costs, including the cost of the resources needed to complete project activities. It includes specifications for estimate currency, levels of precision needed, approved estimating techniques, roles and responsibilities for cost activities, reporting formats, whether indirect costs are included, guidelines for establishing a cost baseline, methods for documenting costs, control thresholds, rules for measuring cost performance, cost change control procedures, and information on control accounts. It does not contain the budget itself; instead, it describes how the budget will be built, measured, and controlled. *CH 7, pp. 264, 271, 275*

Finish-to-finish (FF) A logical relationship in which an activity must finish before the successor can finish. *CH 6, p. 215*

Finish-to-start (FS) A logical relationship in which an activity must finish before the successor can start. This is the most commonly used relationship. *CH 6, pp. 208, 214-215, 217, 249; CH 1, p. 23*

Finish-to-start (FS) dependency A dependency in which a successor activity cannot begin until a predecessor activity is completed—for example, construction of a second floor cannot begin until structural inspection of the first floor is completed. *CH 6, pp. 208, 214-215, 217, 249*

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Fishbone diagram A cause-and-effect diagram used in root cause analysis, also known as a "Why-why" or Ishikawa diagram. Root cause analysis leads to reorganizing identified risks by their root causes to help find more risks. *CH 10, p. 382; CH 4, p. 126*

Fist of five A voting technique commonly used on adaptive projects (also called "fist to five"). A closed fist indicates a zero (no support) and an open fist indicates five (full support). Team members who are not supportive (who showed two or fewer fingers in the vote) share why they are not in support of the option. Voting is repeated until everyone in the group indicates their support by showing at least three fingers. *CH 6, p. 227*

Fixed costs Costs that do not change as production changes. Examples include rent and utilities. *CH 7, pp. 252, 257*

Fixed-price contract (FP) A contract used for acquiring goods, products, or services with well-defined requirements or specifications. A clearly defined statement of work (SOW) along with competing bids generally produces a fair and reasonable price. If costs exceed the agreed-upon amount, the seller bears the burden of the additional costs, giving the buyer the least cost risk. The seller is most concerned with the procurement SOW in this contract type, as it helps them estimate time and cost and determine a price that includes a fair and reasonable profit. *CH 11, pp. 418, 422*

Fixed-price work packages An adaptive contract type in which the contract is paid in increments when work packages are delivered, rather than as one lump sum at the end of the contract. *CH 11, p. 422*

Float A description of how much an activity can be delayed before that delay creates a problem elsewhere in the schedule. Every activity carries a float value. A float value of zero means any delay pushes directly into a successor activity or a deadline, with no buffer in between. There are four types of float. *CH 6, pp. 209, 229-232*

Focus Areas model PMI's model that organizes project management concepts and processes into five focus areas—Initiating, Planning, Executing, Monitoring and Controlling, and Closing—describing in a general way how a project is managed, whether from beginning to end or through iterative and incremental development. *CH 2, pp. 36, 38-39, 45, 62; CH 1, p. 11; CH 4, pp. 104, 106, 111, 120, 122, 125, 132, 135, 137, 141*

Focus groups A requirements elicitation technique that elicits opinions and requirements from stakeholders and subject matter experts selected from a specific demographic group. Participants discuss ideas with each other, directed by a moderator. *CH 5, pp. 165, 169, 202*

Force majeure A situation that could be considered an "act of nature"—such as a fire or severe electrical storm—that is an allowable excuse for either party not meeting contract requirements. A force majeure is considered neither party's fault. It is usually resolved by the seller receiving an extension of time, and the risk of loss of items destroyed in such an event is typically borne by the seller and covered by insurance. *CH 11, p. 424*

Forcing (directing) A conflict resolution technique that involves pushing one viewpoint at the expense of another. It is a win-lose situation and is usually the worst choice, though the best answer depends on the situation described. *CH 9, p. 339*

Forecasting report A type of project report that predicts future project status and performance. *CH 8, p. 307*

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Forming The first stage of Tuckman's ladder model of team formation, in which people are brought together as a team. *CH 9, pp. 336-337, 341*

Forward pass A technique in which the "early" figures are found by calculating from the Start to the End of the project, following the dependencies in the network diagram. *CH 6, pp. 227-228*

Free float The amount of time an activity can be delayed without delaying the early start date of its successor(s) while still adhering to imposed schedule constraints. *CH 6, p. 229*

Frequent verification and validation An adaptive quality strategy of using regular testing, short timeboxes, and reviews to meet the customer's needs. This practice is built into all adaptive methodologies and is designed to discover and address human error or the misinterpretation of customer expectations early and often. *CH 5, p. 151; CH 4, p. 130*

Functional or resource manager A manager responsible for the human and physical resources in a specific department (such as IT, engineering, public relations, or marketing) and for working with the project manager to meet the needs of the project. The functional or resource manager maintains a calendar indicating availability of people, facilities, or equipment for projects and organizational work. *CH 3, pp. 90, 94*

Functional organization A common organizational structure in which the company is grouped by areas of specialization, such as accounting, marketing, or manufacturing. Projects generally occur within a single department; team members complete project work in addition to normal departmental work, and work requests between departments are transmitted through department heads. *CH 3, pp. 72, 76, 90*

Funding limit reconciliation A Develop Budget technique. Because funding often arrives in increments (quarterly, annually, or by milestone), the project manager reconciles planned spending against those funding limits, smoothing the budget so the project does not exceed available cash at any point. *CH 7, p. 261*

Future state The state defined by the project objectives and encapsulated in the project's scope and requirements; the desired end condition that the project is meant to produce. A project is undertaken to bring stakeholders from the current state to the future state with as little disruption as possible. *CH 12, pp. 449, 464-465, 471*

G

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Gantt chart A bar-chart visualization of the schedule produced by scheduling software. Gantt visualizations save time analyzing what-if scenarios, tracking progress, and reporting to stakeholders, but they are only as good as the thinking behind them; schedule management is about modeling how planned value becomes delivered value, not defending dates on a Gantt chart. *CH 6, pp. 208, 244*

Generalizing specialists Agile team members who excel in a core competency but can also contribute across a broader range of skills, reflecting a T-shaped skill profile. Specialists are still needed, but teams prefer generalizing specialists who can share workload and adapt to changing project needs. *CH 9, pp. 335, 345*

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Gold plating Giving the customer extras beyond what was required (extra functionality, higher-quality components, extra scope, or better performance). Considered waste because it threatens efficient value delivery. *CH 5, pp. 152, 155, 201, 203-205*

Governance The structures, roles, and processes that guide and control the project to achieve its intended value. Governance provides the framework of decision-making, approvals, escalation paths, and accountability that ensures projects follow rules, meet requirements, and deliver value aligned with organizational objectives. Governance ensures that compliance is monitored and enforced while also enabling strategic oversight, risk management, and decision-making. *CH 12, pp. 447, 451-452, 455-457, 461, 466; CH 1, pp. 9-10, 17, 26-30; CH 3, pp. 66, 68, 70-72, 74, 76, 78, 80, 82*

Grade A general classification of a product (e.g., the strength of concrete) that can be used for various technical specifications. Different from quality; a product can be low grade but high quality if it meets all established requirements. *CH 5, pp. 154, 156, 159, 167-169, 198*

Graduated fixed-price An adaptive contract type that has a fixed price based on completion by a certain date. If the work is completed before the target date, the seller is paid a higher fee—the fixed price plus a bonus. If the work is completed after the target date, the seller is paid at a fee lower than the fixed price. This incentivizes early delivery. *CH 11, pp. 422, 444*

Graduated fixed-price contracts A contract structure suited to adaptive delivery in which a small scope increment is locked at a time. The team commits to a defined deliverable for a fixed price within a short window, then repeats. This approach balances predictability with flexibility, making it appropriate when scope is not fully defined at the project's outset. *CH 13, pp. 495, 497*

Green human resource management (Green HRM) A resource management tool and technique, listed in the PMBOK® Guide, that applies sustainability principles to how a project team is managed. It incorporates environmental and social responsibility into resourcing decisions—for example, selecting vendors with sustainable labor practices, preferring digital communication over printed materials, planning for remote work to reduce commuting impact, and factoring in employee well-being as part of resource stewardship. *CH 9, pp. 346, 348, 367*

Ground rules Rules included in the team charter that help eliminate conflicts or problems during the project by making expectations clear. Team member input on ground rules increases the likelihood that they will be followed. Examples include how team members resolve conflicts, when to notify the project manager of difficulty, rules for meetings, and how the team decides work assignments. *CH 9, pp. 344, 348-349, 367*

Gulf of evaluation A communication gap between the user and the developer, analogous to a game of "telephone" in which what one person hears differs from what they pass on. The gulf of evaluation reinforces the need for a good interactive communication model. *CH 9, pp. 331, 370*

Gulf of execution A gap between how closely a feature or product can actually be implemented compared to what the user wants. For example, content developers may envision a one-click search result, but database constraints may require the user to make additional selections. *CH 9, p. 331*

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Gulf of execution and gulf of evaluation Gaps between user expectations and system operation. These gaps are bridged through interactive design with the user, achieved by building the system in short iterations followed by iteration reviews. The customer sees small product increments, discusses them with the team, and in this way clarifies their own requirements. The team in turn gains a better understanding of what the customer needs. *CH 8, p. 302*

H

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Halo effect The tendency of project managers (and managers in general) to rate team members high or low on all criteria due to the impression of a high or low rating on one specific criterion. For example, assuming a strong programmer will also make a strong team leader. *CH 9, p. 355*

Herzberg's Two-Factor Theory of Motivation A motivation theory that distinguishes between hygiene factors and motivating agents. Poor hygiene factors can destroy motivation, but improving them generally will not improve motivation; true motivation comes from motivating agents such as responsibility, self-actualization, professional growth, and recognition. *CH 9, p. 333*

Histograms A quality tool used to analyze the type and frequency of defects in order to identify where quality improvements should be focused. *CH 4, p. 127*

Historical information Information maintained and updated by every project and made accessible to the rest of the organization as part of organizational knowledge repositories. Historical information can be used to plan and manage projects, thereby improving the process of project management and avoiding challenges experienced by past projects. Examples include activities, WBSs, backlogs, benchmarks, reports, risks and risk responses, estimates, retrospective findings, resources used, project management plans, project documents, prototypes, baselines, and correspondence. *CH 3, pp. 82, 86*

Human resources (team) management plan A component of the resource management plan that includes team requirements (who, when, how many, what skills and expertise, duration), roles and responsibilities, project organizational charts, the process for acquiring human resources (internal or procurement), training, team development, and recognition, project team management (team charter, ground rules, engagement, communications), compliance with human resources rules, safety policies, and release of human resources as work is completed. *CH 9, p. 348*

Hybrid project management environment A project management environment that uses a combination of predictive and adaptive development approaches. *CH 2, p. 58*

Hygiene factors In Herzberg's Two-Factor Theory, conditions that, if poor, may destroy motivation but, if improved, will not typically improve motivation. Examples include working conditions, salary, personal life, relationships at work, security, and status. *CH 9, pp. 333, 335*

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Identify Stakeholders A process carried out as early as possible in the project to find and document all individuals and groups who may affect or be affected by the project. The later new stakeholders are discovered, the greater the cost of changes their new requirements involve. The process includes determining each stakeholder's requirements, expectations, interest, influence, level of authority, and values. The key output is the stakeholder register. *CH 8, pp. 282-283, 285-287, 291, 321*

Impediment Anything that slows or blocks the team's progress, ranging from external dependencies and approval delays to broken tooling, unclear requirements, or interpersonal friction. The Scrum Master (or, in non-Scrum frameworks, the team coach or project manager) is responsible for surfacing and removing impediments quickly so work keeps flowing; removing impediments is the focus of ECO Domain III, Task 4. *CH 13, p. 475*

Incentives Provisions added to a contract to bring the seller's objectives in line with the buyer's and to motivate the seller toward efficiency. An incentive functions as a bonus for the seller for meeting cost, performance, or schedule objectives. The buyer must use incentives strategically, as they can affect scope, quality, or other project constraints. *CH 11, pp. 423, 425, 441*

Incremental delivery (value increments) An iterative approach that produces usable portions of value over time, allowing for feedback, alignment with compliance, and benefits realization. *CH 12, pp. 449, 468-469*

Incremental funding An approach used on adaptive projects where budgeting is handled incrementally rather than through a single upfront approval. Funding is released in stages—such as per quarter, phase, or milestone—and leadership regularly reviews the value delivered against the money spent. Based on these reviews, the project can continue as planned, pivot in a new direction, or be stopped early. This approach reduces financial risk compared to committing to a large, fixed budget before outcomes are fully known. *CH 7, p. 252*

Incremental product delivery The agile practice of delivering the MVP and minimal marketable features (MMFs) to the customer through frequent product releases until the agreed-upon project backlog is complete, providing value early and allowing continuous feedback. *CH 5, p. 198*

Indefinite Delivery, Indefinite Quantity (IDIQ) contract A contract that provides for an indefinite number of goods and services within a fixed time frame and within a certain cost range. Even if no services are needed, the seller will be paid the minimum amount stated in the contract. The risk on this type of contract is equally split: if the seller's goods or services are not needed in the allotted timeframe, the buyer accepts the risk (paying out the minimum amount anyway); if the seller provides more goods and services than anticipated, the seller accepts the risk because their fee is capped. This contract type is used most often in engineering or information technology. *CH 11, pp. 418, 420-421, 444*

Indemnification (liability) A terms-and-conditions clause that addresses who is liable for personal injury, damage, or accidents arising in connection with the performance of the contract. *CH 11, pp. 424, 428*

Independent cost estimates An internal estimate prepared by the buyer—often using expert judgment—to establish a benchmark against which to validate bids received from prospective sellers. Significant differences between the buyer's

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estimate and a seller's proposed cost may indicate an issue with the seller's understanding of the procurement SOW. *CH 11, pp. 427, 431, 442, 444*

Indirect costs Overhead costs incurred for the benefit of more than one project. Examples include taxes, fringe benefits, and janitorial services, which are operational expenses (OpEx), or building or technology costs, which are capital expenses (CapEx). *CH 7, pp. 256-257*

Individual assessments Formal and informal assessments of individual team members by the project manager, using personnel assessment tools that reveal how team members make decisions, interact with others, and process information. The information gained provides insight into how to lead and guide the team and should continue throughout the project. *CH 9, p. 361*

Individual management plans The management plans for scope, schedule, finance, quality, resources, communications, risk, procurement, and stakeholder engagement, as well as plans for iteration, release, testing, change, requirements, and sourcing strategy. These are integrated into the overall project management plan. *CH 4, pp. 113, 117, 145, 150*

Influence A stakeholder attribute reflecting the degree to which a stakeholder can impact a project negatively or positively. A high-influence stakeholder can have a major positive or negative effect on the project, whereas a low-influence stakeholder is unlikely to affect the project regardless of their level of interest. *CH 8, pp. 284, 288, 296*

Influencing A project management skill that begins with actively listening to differing viewpoints expressed by team members. Acknowledging those perspectives and using communication and persuasion skills helps the project manager develop mutual trust and, eventually, agreement within the team. *CH 9, pp. 358-359, 363*

Information radiators Visible displays of project information, typically appearing in the team's work area (whether physical or digital). The purpose is to make it easy for the team to work together and give other stakeholders easy access to project information. Information displayed may include features delivered and remaining, features for the current iteration, risks, burn charts, velocity metrics, defect metrics, and burndown/burnup charts. *CH 8, pp. 308-309*

Initiation (agile process) The second of the five columns (processes) in Rita's Agile Process Chart, following Feasibility. Initiation includes developing the project charter, creating the team charter, identifying stakeholders, and creating the initial backlog of features with high-level estimates. Agile teams are typically stable over time, so projects are brought to an existing team rather than a new team being assembled. *CH 2, p. 55*

Inputs The information, artifacts, and other items needed to perform a process or activity, such as the project management plan, project documents, agreements, deliverables, enterprise environmental factors (EEFs), and organizational process assets (OPAs). Inputs are transformed by tools and techniques into outputs; each Process domain chapter of this book closes with a summary of inputs, tools and techniques, and outputs (ITTO). *CH 4, pp. 146-147; CH 2, p. 63; CH 3, p. 66*

Inputs, tools and techniques, and outputs (ITTO) The structure used to describe each project management process: the key inputs it uses, the tools and techniques applied, and the outputs it produces. Table 4.2 summarizes common ITTOs for the governance (integration) processes; use such summaries to recognize what the exam is testing, then apply tailoring based on context and approach. *CH 4, pp. 146-148*

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Inspection A technique used to verify that deliverables meet requirements. May include walk-throughs and measurement of deliverables. Also used to confirm that previously approved changes have been implemented correctly. *CH 5, pp. 172, 177, 190, 192, 197, 202, 204*

Inspections and audits Tools for managing procurements that may involve walkthroughs of the work site or deliverables reviews to verify compliance with the procurement SOW. Inspections are related to deliverables while audits are related to processes, policies, and procedures. Audits are performed by a team including representatives of both the buyer and the seller to confirm the seller's activities comply with approved procurement policies and processes. Variances are identified, formal adjustments are made, and lessons learned are captured. *CH 11, pp. 434, 441*

Integrate and Align Project Plans A Focus Areas Model process in the Planning focus area that involves creating a project management plan describing the project's development approach and life cycle, and how the project will be executed and controlled. The resulting project management plan must be bought into, approved, realistic, and formal. *CH 4, pp. 103-104, 111, 118, 120, 146*

Integration management The coordination of all project management domains into a cohesive system. Integration is the project manager's core responsibility throughout the project life cycle. *CH 15, p. 518*

Intellectual property A terms-and-conditions clause that addresses who owns the intellectual property—such as patents, trademarks, copyrights, processes, source code, or books—used in connection with or developed as part of the contract. This may include warranties of the right to use certain intellectual property in performance of the contract. *CH 11, p. 424*

Interactive communication model A comprehensive communication model that includes three main components: the sender, the receiver, and confirmation that the message is correctly understood. Each message is encoded by the sender and decoded by the receiver; both are responsible for confirming that the message has been properly interpreted. *CH 9, pp. 330, 370*

Interest A stakeholder attribute reflecting a stakeholder's level of concern about the project. High-interest stakeholders may be supporters or active opponents of the project. Low-interest stakeholders may include high-level executives whose support is still vital, or customers who are as yet unaware of the project. *CH 8, pp. 280, 284, 287-289, 291, 296, 324*

Internal dependency A type of dependency based on needs internal to the project and that may be within the project team's control. *CH 6, p. 216*

Internal rate of return (IRR) The rate at which the net present value (NPV) of the project inflows (revenues) and project outflows (costs) are equal; essentially the interest rate the project earns if it were treated as a bank account. When comparing projects, the higher the IRR, the better. *CH 3, pp. 78, 81, 85, 97, 100*

Interviewing A requirements elicitation technique where the project manager and/or team member interviews stakeholders to elicit requirements. May be conducted between two individuals or in group settings, in person, via email, by phone, or using virtual collaboration tools. *CH 5, p. 151*

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Intrinsic motivation Internal factors that motivate people, over which (according to Daniel Pink) the project manager has the most influence. Pink identifies three categories of intrinsic motivators: autonomy, mastery, and purpose. *CH 9, p. 332*

Investment control A governance component that involves overseeing how project funds are managed. It is especially important in organizations that require formal financial accountability, such as government agencies or financial institutions, and typically includes reviewing risks, expected returns, and overall project performance at defined points to determine whether continued funding is justified. *CH 3, pp. 71, 97*

Invitation for bid (IFB) A type of bid document—sometimes called a request for bid (RFB)—that usually requests a total price to do all the work. An IFB is a form of RFP where the work described in the procurement SOW is detailed enough for bidders to determine a total price. *CH 11, pp. 428, 430, 444*

I-shaped team members Team members who specialize in one area. I-shaped skills are contrasted with T-shaped skills. *CH 9, p. 335*

Issue Something that has taken place, or is happening now, and is impacting the project. An issue differs from a risk, which is an event that has not yet happened. Issues are recorded in the issue log for resolution. *CH 10, pp. 374, 381-382, 398-399, 405-407, 409-410*

Issue log A document, also known as an issue register or action item log, used to record problems and their resolutions. The issue log is typically updated throughout the project to reflect new issues and the resolution of existing ones, making it frequently both an input and an output of the same processes. Common columns include issue number, issue description, date added, raised by, person assigned, resolution due date, status, date resolved, and resolution. *CH 9, pp. 362-365, 368, 370*

Iteration On agile projects, a specifically set period of time during which a project team refines plans or builds the product of the project. Also called a sprint in Scrum; set in specific "timeboxes." An initial iteration in which detailed requirements are gathered before regular build iterations begin is known as iteration 0. *CH 6, pp. 211, 219, 225, 237; CH 2, pp. 41, 44, 50, 54, 57, 61-62; CH 5, pp. 154-156, 159-160, 162-163, 196, 198*

Iteration 0 An initial iteration in which detailed requirements are gathered before regular build iterations begin. *CH 2, pp. 61-62*

Iteration Planning A meeting held before each iteration where the team and product owner decide which prioritized product increments will be built during the upcoming iteration. More details are worked out and already-documented details are verified. *CH 5, pp. 160, 162-163, 186, 201*

Iteration planning meeting A meeting that happens before each iteration in which further details for the upcoming iteration are worked out and details already documented are verified. Prior to this meeting, the team has participated in visioning the product and project, created a backlog of high-level requirements (as stories), prioritized them with the help of the product owner, and completed the high-level estimates needed. *CH 4, pp. 123, 131*

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Iteration retrospective A meeting held after the iteration review in which the team discusses what they did well, what went wrong, and what they would do differently. *CH 2, p. 57*

Iteration review Post-iteration demonstrations of completed product increments to stakeholders. Used in adaptive and hybrid approaches to get feedback, verify real requirements, and demonstrate increasingly mature product releases before delivery. *CH 5, pp. 154, 172, 198; CH 2, pp. 44, 54, 57, 61-62; CH 8, pp. 301-302, 306, 310, 314*

Iterative and incremental development The adaptive and hybrid practice of building the product in short iterations that deliver small increments of work, so the team can evaluate increments and get feedback on the evolving product as soon as possible. Issues are found early and resolved quickly, added costs are avoided, and rework is reduced (see Cost of change). *CH 4, p. 130*

J

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Joint application design (JAD) A facilitation session used primarily in software development efforts to elicit requirements and other input from stakeholders in order to enhance the process of developing the software. *CH 5, p. 166*

Just in time (JIT) Having suppliers deliver resources just before they are needed, decreasing inventory to nearly zero and decreasing unnecessary cost. Forces attention on quality as well as schedule. *CH 5, pp. 155, 185*

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Kaizen The Japanese term for "change for the better"—continuous, incremental improvement driven by the people who do the work. Less a methodology than a culture: rather than waiting for a large, top-down transformation, a kaizen organization makes many small improvements continuously and trusts the team closest to the work to identify them. It is the philosophical thread tying together lean, agile retrospectives, and Six Sigma. *CH 13, p. 479*

Kanban An agile framework originating from the Japanese word for 'signboard' whose core purpose is making work visible. Kanban is a pull system: work is pulled when other work is completed, not pushed by assignment. Work-in-progress (WIP) limits are the control mechanism: when a column on the Kanban board is full, no new work enters it until something moves forward. Kanban is flow-based, with work moving continuously and no required sprint or iteration cycle. Its five core principles are: visualize the workflow, limit work in progress, manage flow, make policies explicit, and improve collaboratively. *CH 13, pp. 481-482*

Kanban board A visual tool used to track workflow, project progress, and to illustrate and limit work in progress (WIP). "Kanban" is a Japanese word meaning "signboard" or "billboard." A Kanban board displays the status of all work currently in progress by organizing tasks in columns (such as "To Do," "In Process," and "Done"), making it easy for any stakeholder to see how work is progressing. Digital Kanban boards are increasingly common for geographically distributed teams. *CH 8, pp. 307-308*

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Key performance indicators (KPIs) Measures used to review project performance. Project managers use KPIs to assess their team's performance and help plan the project as it progresses. Examples on an agile project include rate of progress, remaining work, likely completion date, and likely costs remaining. *CH 9, pp. 358, 361, 368*

Kickoff meeting A meeting of the key parties involved in the project, held before project executing begins, to announce the start of the project, to ensure everyone is familiar with its details (including objectives and roles and responsibilities), and to ensure a commitment to the project from everyone. The meeting may also review milestones, risks, the communications management plan, and the meeting schedule. *CH 4, p. 120*

Knowledge management A process that requires each project to actively contribute to the organization's knowledge base by sharing new processes, successes, and discoveries both internally within the project and throughout the entire organization. Successful knowledge management requires an organizational culture of trust in which the project manager and stakeholders exchange knowledge without fear of judgment. *CH 4, pp. 124, 132, 145, 147*

Knowledge sharing The active distribution and discussion of project information among team members and stakeholders to help improve individual and project performance. Agile projects embrace knowledge sharing through daily coordination meetings, Kanban boards, personas, planning sessions, product demos, information radiators, wireframes, and retrospectives. *CH 8, pp. 307, 314*

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Lag An adjustment applied to a logical relationship that introduces a required waiting period between activities, during which no work on the successor occurs, usually due to a constraint like stabilization time, an approval window, shipping/hand-off delay, or a policy requirement. *CH 6, pp. 214-215, 217*

Lagging indicator Something that has already happened on a project (for example, incomplete work from the last iteration). A lagging indicator is easier to analyze and measure than a leading indicator. *CH 4, pp. 135, 145, 149*

Last responsible moment A Lean principle of deferring decisions to the point at which waiting longer would cost more than deciding now. Applied through adaptive planning, rolling wave planning, and progressive elaboration, this principle avoids premature commitment to solutions when important information is still emerging. *CH 13, p. 478*

Law of diminishing returns The concept that after a certain point, adding more input (for example, additional programmers) will not produce a proportional increase in productivity. The law of diminishing returns supports closing a project when additional development no longer yields acceptable value. *CH 3, p. 80*

Lead An adjustment applied to a logical relationship that allows a successor activity to begin before its predecessor is complete, compressing the schedule by overlapping work. *CH 6, pp. 209, 215, 246*

Lead time A Kanban metric measuring the total elapsed time from customer request to customer delivery of a work item. Used alongside cycle time and throughput to forecast delivery and identify process problems. *CH 13, p. 482; CH 6, pp. 239, 246*

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Leading indicator An indicator that shows what is about to happen on a project and can identify trends (for example, work in progress exceeding limits mid-iteration may indicate an agile team may not be able to complete work). If a leading indicator identifies a potential problem, the project manager and team should use root cause analysis to find and correct the issue before the problem occurs. *CH 4, pp. 135, 145, 149*

Leads and lags Adjustments applied to logical relationships to produce more realistic schedules. A lead allows two activities to overlap; the successor can begin before the predecessor is fully complete. A lag inserts deliberate waiting time between activities. Leads and lags adjust how activities relate in time—they do not change the underlying logic of the dependency itself. Duration estimates are calculated independently and do not include leads or lags. *CH 6, pp. 209, 214-215, 218, 241, 247-248*

Lean A philosophy and set of principles originating from the Toyota Production System in the 1940s and 1950s, focused on eliminating everything that does not add value. Lean's seven principles are the philosophical foundation of nearly every agile framework. The seven principles are: Eliminate Waste, Amplify Learning, Decide as Late as Possible, Deliver as Fast as Possible, Empower the Team, Build Quality In, and See the Whole. *CH 13, pp. 477-479, 488*

Lean scheduling An alternative scheduling method that ensures work is started only when conditions are ready, reducing waste. *CH 6, p. 244*

Lessons learned Information documenting what was done right, what was done wrong, and what would be done differently on the project. As an input, they help improve the current project. As an output, they help make the organization better by providing historical information for future projects and project managers. Lessons learned should include an overview of each situation, what corrective actions were taken, the impacts of actions taken, and the resulting updates to project artifacts. *CH 4, pp. 124, 133-134, 142, 145-147, 150; CH 3, pp. 82, 91; CH 8, pp. 285, 307, 321-322*

Lessons learned register A project document, and a main output of Manage Project Knowledge, in which lessons learned are recorded throughout the project. It captures what was done right, what was done wrong, and what would be done differently, including an overview of each situation, the corrective actions taken, their impacts, and the resulting updates to project artifacts. It is revised as work is carried out and becomes part of the organizational process assets for future projects. *CH 4, pp. 119, 124, 133, 142, 146-147*

Level of authority A stakeholder attribute reflecting each stakeholder's ability to enforce decisions. A stakeholder's level of authority will impact their effect on the work and outcome of the project. *CH 8, pp. 283-284*

Life cycle A progression through a series of developmental stages used to develop and deliver outcomes. The organization's methodology influences the life cycle, and the project manager tailors it to fit the project. It is a logical breakdown of what the project manager needs to do to produce the project deliverables, selected based on factors such as the type of product being developed, the industry, the organization's preferences, and the development approach. A life cycle can be predictive, adaptive, or hybrid. *CH 1, pp. 8, 10, 18, 26-29*

Location-based scheduling (LBS) An alternative scheduling method for projects organized by physical areas, such as a construction project, that takes location and time into account. *CH 6, p. 244*

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Logical relationships The dependency connections between activities in a schedule network diagram. There are four types: finish-to-start (FS), start-to-start (SS), finish-to-finish (FF), and start-to-finish (SF). *CH 6, pp. 214-215, 239, 247*

M

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Machine learning (ML) A form of artificial intelligence in which models are trained on data, such as historical project data, to recognize patterns and make predictions. On projects, ML models can produce more accurate duration and cost estimates and are combined with statistical models in predictive analytics to forecast resource needs and performance. *CH 6, p. 219; CH 9, p. 351; CH 13, p. 477*

Machine learning (ML) estimating The use of machine learning models trained on historical project data to produce more accurate duration (and cost) estimates. An example of AI-supported estimating. *CH 6, p. 219*

Magic Three, The A study technique based on research showing that revisiting a topic multiple times improves retention. The learner reads the book once to understand the concepts, then reviews it two more times, focusing on areas not encountered in day-to-day work and on concepts that are difficult to understand or remember. *CH 1, p. 30*

Make-or-buy analysis A planning technique used to decide whether the scope and work of the project will be completed within the organization (insourcing) or if some of it will be outsourced. An important consideration is the required lead time for materials and equipment to be purchased. Make-or-buy analysis is done early in the planning phase and results in a make-or-buy decision. *CH 4, pp. 120-121, 146*

Management requirements A terms-and-conditions clause that specifies project management activities the seller is required to perform. Examples include attendance at meetings and approval of staff assigned to the project. *CH 11, pp. 417, 422, 424, 429, 443-444*

Management reserves Reserves that account for "unknown unknowns"—items the project manager did not or could not identify during risk management. Management reserves are estimated (for example, as a percentage of the project cost) and added to the cost baseline to get the project budget. Management approval is needed to use management reserves. They may be used for situations within the scope of the project that were not previously identified. *CH 10, pp. 395, 400, 403, 405-406, 410; CH 6, p. 226*

Management reviews Milestones built into the project management plan as part of its governance, indicating times when management and stakeholders will compare project progress to what was planned and identify needed changes to any of the management plans. Milestones may be driven by organizational processes, stakeholder needs, or internal project requirements. *CH 4, pp. 111, 113*

Mandatory dependency (hard logic) A type of dependency that is inherent in the nature of the work or is required by a contract. Mandatory dependencies often involve physical limitations. *CH 6, p. 216*

Maslow's Hierarchy of Needs A motivation theory proposing that the highest motivation for most people is to contribute, to grow, and to use their skills—an outcome Maslow called self-actualization. The hierarchy states that people cannot ascend to the next level of need until the levels below are fulfilled. *CH 9, pp. 332-333*

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Master service agreements Contracts between two parties that include standard terms governing future transactions. They are a time-saving approach when a buyer frequently works with the same seller, as the overall terms of working together are already agreed to and signed by both parties. *CH 11, pp. 426, 429*

Mastery One of three intrinsic motivators identified by Daniel Pink. Mastery is the desire to improve, excel, learn, and do excellent work. *CH 9, pp. 332, 334-335, 341, 357*

Material breach A breach of contract so significant that it may not be possible to complete the work under the contract. *CH 11, p. 424*

Matrix organization An organizational model that seeks to maximize the strengths of both the functional and project-oriented models. Team members report to two managers—the project manager and the functional manager—and do project work in addition to operations work. Subcategories include balanced, strong, and weak matrix. *CH 3, pp. 73, 90*

McClelland's Theory of Needs (Acquired Needs Theory) A motivation theory stating that people are most motivated by one of three needs: achievement (people who should be given challenging but reachable projects and like recognition), affiliation (people who work best when cooperating with others and seek approval rather than recognition), or power (people whose socially oriented need for power makes them effective leaders who should be allowed to manage others). *CH 9, p. 333*

Mediation An alternative dispute resolution method in which a neutral third party facilitates the conversation and helps the buyer and seller reach a mutually acceptable solution. A mediator typically does not make a decision on the dispute; they act strictly as a facilitator. *CH 11, pp. 422, 435*

Meeting management A set of practices designed to make time spent in meetings efficient and effective. Effective meeting management includes having a clear purpose for each meeting, distributing an agenda beforehand, starting on time, assigning a facilitator and notetaker, using a parking lot for off-topic items, closing each agenda item with a clear decision or action item, and distributing written minutes with decisions and action items within 24 hours. *CH 8, pp. 304, 320, 323*

Method The set of tools itself, as distinguished from a model (which is a way of understanding a concept or a set of tools). *CH 2, pp. 36-37, 54, 58-62*

Milestones Schedule markers for significant events (for example, approvals, releases, or phase gates). They are not work activities. Milestones have zero duration, by definition, but they do fall on certain dates. In schedule visualizations (like network diagrams and Gantt charts), milestones are usually represented by diamond shapes. *CH 6, pp. 209, 239, 245-247*

Mind maps A graphic requirements elicitation method of diagramming ideas or notes to help generate, classify, or record information. Branches out from a central core; colors, pictures, and notations can be used to enhance readability. *CH 5, p. 167*

Minimum marketable feature (MMF) The smallest set of functionalities that delivers stakeholder value and can be delivered incrementally, supporting adaptive approaches to value realization. An MMF is the smallest feature that can

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be released to users that stakeholders need or will find useful. *CH 5, pp. 156, 198, 204-205; CH 2, p. 57; CH 12, pp. 449, 461*

Minimum viable increment The smallest version of a feature or product increment that delivers real, standalone value to the customer. Building the minimum viable increment first gives customers something useful quickly and generates feedback that shapes what is built next. *CH 13, pp. 478, 484, 496*

Minimum viable product (MVP) The smallest usable increment of a product that the team can deliver to a real customer; it should validate assumptions and provide feedback to the rest of the project. *CH 5, pp. 156, 198, 204-205; CH 1, pp. 20, 28; CH 2, p. 57; CH 12, p. 461*

Mitigate A risk response strategy for threats that reduces the probability and/or the impact of a threat, thereby making it a smaller risk and possibly removing it from the list of top risks on the project. Options for reducing probability are considered separately from options for reducing impact; any reduction helps, but the option with the most probability and/or impact reduction is often selected. *CH 10, p. 392*

Model A way of understanding a concept or a set of tools. *CH 2, pp. 36, 38, 45, 60*

Monte Carlo analysis A simulation used in quantitative risk analysis in which schedule and cost estimates are used to "perform" the project many times to simulate results. Monte Carlo analysis evaluates overall project risk using a specialized computer application; determines the probability of completing the project on any specific day or for any specific cost; determines the probability of any activity actually being on the critical path; considers path convergence; translates uncertainties into impacts; can assess cost and schedule impacts; and results in a probability distribution. *CH 10, pp. 387, 389; CH 6, pp. 234, 245*

MoSCoW method A prioritization technique used in DSDM that classifies work items into four categories: Must have (essential requirements without which the solution will not work), Should have (important but not critical requirements), Could have (desirable but lower-priority requirements), and Won't have this time (requirements explicitly deferred to a future release or excluded from scope). *CH 13, p. 487*

Motivating agents In Herzberg's Two-Factor Theory, factors that energize and engage people through the work itself, assuming hygiene factors are satisfied. Examples include responsibility, self-actualization, professional growth, and recognition. *CH 9, pp. 333, 335*

Multicriteria decision analysis A requirements elicitation technique where stakeholders quantify requirements using a decision matrix based on factors such as expected risk levels, time estimates, and cost and benefit estimates. *CH 5, pp. 165-166; CH 4, p. 128*

Multidivisional organization (M-form) An organizational structure in which the company is organized into separate divisions, each responsible for a major part of the business. Each division has its own functional departments (marketing, finance, HR, etc.) and operates as a semi-autonomous unit within the overall corporation. This structure is used by organizations with diverse products or markets. *CH 3, p. 73*

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Near-critical path The path through the network diagram that is closest in duration to the critical path and should also be watched closely. The closer in length the critical and near-critical paths are, the more risk the project has. *CH 6, pp. 227, 229*

Needs assessment The analysis performed when the business case is developed to identify the objectives for which the project was initiated. All requirements should relate to achieving these objectives, as outlined and approved in the project charter. *CH 5, p. 163*

Negative float A float condition that results when externally imposed completion dates are not feasible. On the exam, when negative float is present, the correct next step is to identify options for schedule compression (crashing or fast tracking), evaluate whether scope can be reduced, or escalate through governance to negotiate the deadline. *CH 6, pp. 229, 232, 234, 250*

Negotiating for resources The process by which the project manager obtains team members from within the organization. Effective negotiation requires knowing the needs of the project, the project's priority in the organization, how the resource manager will benefit from assisting, the resource manager's own priorities, and the ability to prove resource requirements using artifacts such as the network diagram and project schedule. *CH 9, p. 355*

Negotiation An alternative dispute resolution method in which the buyer and seller discuss the issue directly and try to reach an agreement without involving a third party. *CH 11, pp. 425, 430-432, 435, 437*

Net present value (NPV) The present value of the total benefits (income or revenue) minus the costs over many time periods. Generally, if the NPV is positive, the investment is a good choice, unless an even better investment opportunity exists. The project with the greatest NPV is typically selected. *CH 3, pp. 78, 80, 97, 100*

Net Promoter Score (NPS)℠ A quantitative tool used to measure stakeholder or customer satisfaction and loyalty. It is based on a single survey question: "On a scale of 0 to 10, how likely are you to recommend this project (or product, or team) to a colleague?" Respondents are grouped into Promoters (scores of 9–10), Passives (scores of 7–8), and Detractors (scores of 0–6). The NPS is calculated by subtracting the percentage of Detractors from the percentage of Promoters. A positive NPS indicates more advocates than critics; a negative NPS signals that stakeholder satisfaction and engagement strategies need immediate attention. *CH 8, p. 311*

Network diagram A visual representation of project activities and the connections between them, arranged to show which work must happen in what order. In its simplest form, it shows dependencies between activities. If activity duration estimates and leads and lags are added to the diagram, it can also show the critical path. If plotted out against time, the network diagram is a time-scaled schedule network diagram. *CH 6, pp. 214, 217-218, 227-228, 232, 247*

Noise Factors—such as language and cultural differences, the receiver's perception, everyday distractions, or lack of interest—that interfere with the receiver's ability to understand the message in the communication model. *CH 9, pp. 329-331, 362*

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Nominal group technique A structured requirements elicitation technique where participants privately write ideas, share them with the group, discuss them, and then rank the ideas. Often used after brainstorming to evaluate and prioritize ideas. *CH 5, pp. 165-166*

Noncompetitive forms of procurement A procurement approach in which the competitive process is bypassed—for example, by using master service agreements or preferred seller lists—allowing the buyer to issue a purchase order directly to an approved or preferred seller. Noncompetitive procurement may be used when a seller has unique qualifications, the project is under extreme schedule pressure, other mechanisms ensure the seller's prices are reasonable, or the procurement is for a small amount of money. *CH 11, p. 429*

Nondisclosure agreement A written agreement between the buyer and prospective sellers that identifies the information or documents they will control and hold confidential and details who in the organization will have access to the confidential information. With a nondisclosure agreement in place, the buyer can communicate more openly about their needs without fear that the public or a competitor will gain access to the information. *CH 11, p. 423*

Nonverbal communication A significant portion of in-person communication—gestures, facial expressions, and body language—of which the sender must be aware when encoding a message. Verbal meaning can be obscured by accompanying nonverbal factors; pitch and tone of voice also help convey a spoken message. *CH 9, p. 330*

Norming The third stage of Tuckman's ladder model of team formation, in which team members begin to build good working relationships and learn to trust the project manager and each other. *CH 9, pp. 336-337*

Not-to-exceed time and material An adaptive contract type that is a time and materials contract with a ceiling price for the work; the total cannot exceed this amount. *CH 11, pp. 422, 444*

Not-to-exceed time and material contract An adaptive contract form: a time and material (T&M) contract that has a ceiling price for the work, which cannot be exceeded. *CH 11, p. 422*

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Observation A requirements elicitation technique useful for projects aiming to streamline business processes. Involves job shadowing—watching a potential product user at work, asking questions, and sometimes participating in the work to identify requirements. *CH 5, pp. 166-167, 197, 204*

Operational expenses (OpEx) Indirect costs associated with ongoing operational activities. OpEx is one category of costs that may or may not be directly attributable to a single project and may be included or excluded from project cost estimates depending on organizational policy. *CH 7, pp. 256-257*

Operational work Ongoing work to support the business and systems of the organization. Operational work is repeatable, ongoing, and process-driven, as distinguished from project work, which is temporary, unique, and aimed at creating a new product, service, or result. *CH 3, pp. 67, 69-70, 90*

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Opportunities Positive impacts of a risk event that may allow the project manager and team to deliver even more value to the organization and customer than planned. Opportunities are positive risks. *CH 10, pp. 375, 377, 391-393, 396, 398, 408, 410*

Opportunity cost The value of the opportunity given up by selecting one project over another. This does not require any calculation; it is simply the value of the project not selected. *CH 3, p. 80*

Organic or simple structure An organizational structure that is a flexible, informal, and decentralized way of organizing work and authority. Decision-making is distributed closer to where the work happens rather than being concentrated at higher levels of the organization. In this environment, the project manager has limited formal authority and often acts as a coordinator, relying on strong collaboration across the team. *CH 3, p. 73*

Organizational breakdown structure A tool used to assign responsibilities to divisions or departments within the organization, such as marketing or IT. In a matrix environment, the project manager interfaces with the managers of each department to coordinate availability and scheduling of human and physical resources. *CH 9, pp. 346-347*

Organizational cultural intelligence The ability to recognize and adapt to cultural differences across teams, organizations, and geographies. Listed by the PMBOK® Guide as a tool and technique for leading a project team. Cultural intelligence involves actively adjusting communication style, meeting facilitation, and recognition approaches to reflect the values and norms of team members from different backgrounds, and is especially important for virtual and global teams. *CH 9, pp. 328, 341, 368*

Organizational culture The shared values, norms, and behaviors that influence compliance, decision-making, and how value is delivered and received within the organization. Projects are impacted by and have an impact on internal cultural norms and organizational management policies and procedures. *CH 12, pp. 449, 462-463, 466*

Organizational governance The way an organization sets the policies and procedures for how work will be performed to meet business objectives and to support decision-making. Often a board of directors (or similar governing body) is responsible for ensuring that work throughout the organization conforms to external and internal standards and requirements. *CH 3, pp. 71, 75, 95, 97-100*

Organizational knowledge repositories One of the two types of organizational process assets (with processes, policies, and procedures). Historical knowledge bases maintained and updated by every project and made accessible to the rest of the organization, including activities, backlogs, baselines, benchmarks, correspondence, estimates, project documents, project management plans, prototypes, reports, resources used, retrospective findings, risks and risk response plans, and work breakdown structures. Historical information—including lessons learned—is used to plan and manage projects and avoid challenges experienced by past projects. *CH 3, p. 82*

Organizational process assets (OPAs) An organization's processes, procedures, and policies, along with organizational knowledge repositories—things within the organization that can facilitate the work of project management and product development. The project manager and team use these and update them for the organization. *CH 3, pp. 66, 81-83, 99-100*

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Organizational project management (OPM) A framework that serves as a guide or driver for project, program, and portfolio management as well as other organizational practices, keeping the organization focused on overall strategy. OPM provides direction for how portfolios, programs, projects, and operational work should be prioritized, managed, executed, and measured to best achieve business objectives and value for the organization and its stakeholders. *CH 3, pp. 68-70, 96, 100*

Organizational structure The way a company is organized. The organizational structure establishes who the project manager goes to for help with resources, how communications must be handled, and other aspects of project management. Common structures include functional, project-oriented, matrix, organic or simple, and multidivisional. *CH 3, pp. 66, 72, 74, 90, 97, 100*

Organizational theory A method for studying organizations to identify how they solve problems, maximize efficiency and productivity, and meet the expectations of stakeholders. This analysis helps the organization develop effective resource management policies and procedures for the acquisition, management, and evaluation of human and physical resources. *CH 9, pp. 346-347, 367*

Osmotic communication The adaptive concept describing the phenomena of communication and knowledge sharing being facilitated and enhanced simply by team members being in proximity to one another, also known as colocation. Informal sharing occurs naturally when team members overhear each other's daily conversations and work nearby. *CH 4, p. 133*

Outcome A measurable result produced by a project's deliverables. For example, a specified percentage increase in people getting help with job applications, as measured by library staff and patron exit surveys after a computer lab upgrade is delivered. *CH 12, pp. 446-448, 455, 457, 460, 467, 470; CH 2, pp. 52, 59-60, 63*

Outcome-based contracts A contract structure suited to adaptive delivery that defines measurable success criteria without prescribing the solution. The vendor is free to determine how to achieve the outcome. Well suited to adaptive delivery where the path to the outcome may evolve. *CH 13, p. 497*

Outputs Deliverables directly resulting from the work on a project. *CH 2, pp. 43-44, 60, 63*

Outward influence A direction of stakeholder influence referring to external stakeholders—such as vendors, regulators, and the public—who are outside the organization. *CH 8, p. 288*

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Pair programming An eXtreme Programming (XP) practice in which two developers share one workstation: one codes while the other reviews in real time. This practice catches defects instantly and is one of the most powerful knowledge transfer mechanisms in adaptive delivery, since building every feature together eliminates single points of knowledge failure. *CH 13, pp. 485-486, 497*

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Parametric estimating A technique that involves a mathematical equation using data from historical records or other sources, such as industry requirements or standard metrics. The technique analyzes relationships between historical data and other variables to estimate duration or cost. *CH 6, p. 220*

Pareto chart A commonly used type of histogram that arranges measurement results from most frequent to least frequent to help identify which issues are causing the most problems. It applies the Pareto principle (the 80/20 rule), which links cause and effect and observes that 80% of problems are due to 20% of the root causes. *CH 5, p. 191*

Parking lot diagrams A progress-tracking tool introduced by Feature-Driven Development (FDD) that provides a one-page visual summary of overall project progress by feature set, color-coded to show percentage complete. Parking lot diagrams give executives and stakeholders an instant, honest progress snapshot without requiring them to interpret detailed sprint data. *CH 13, p. 490*

Partnership (team configuration) A team configuration in which several organizations undertake a project together. Teams consist of people from each participating organization, plus the project manager from the organization taking the lead. Partnerships may offer advantages such as cost savings, but team management and communication can be more difficult. *CH 9, pp. 354-355*

Part-time team A team configuration in which team members and the project manager spend a portion of their time on the project while also working on other projects or operations-related work. Most often seen in functional and matrix organizations. *CH 9, pp. 354-355*

Passive acceptance A form of the accept response strategy that means doing nothing and essentially saying, "If it happens, it happens," leaving actions to be determined as needed (workarounds) if the risk occurs. *CH 10, p. 393*

Past performance history Information about the buyer's prior experience with prospective sellers and feedback from other organizations that have worked with those sellers, considered when determining which seller to award the procurement to. Some public entities may require bidders to be pre-registered, which establishes a relationship and allows for checks on poor past performance. *CH 11, p. 431*

Path convergence A point in the network diagram where an activity has two or more predecessor activities on different paths. Activities at convergence points are at greater risk, as they are affected by multiple upstream paths. *CH 6, pp. 217, 234-235*

Path divergence A point in the network diagram where an activity has two or more successor activities on different paths. Activities at divergence points are also at greater risk, as delays cascade into multiple downstream paths. *CH 6, p. 217*

Payback period The length of time it takes for the organization to recover its investment in a project before it starts accumulating profit. *CH 3, pp. 79, 85, 100*

People domain One of three performance domains in the Examination Content Outline (ECO); concerns skills and methods that help the project manager and others succeed on projects, including servant leadership, team building, motivation, and conflict management. Approximately 33% of the exam is based on the People domain. *CH 2, pp. 37-38*

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Performance domain A group of related activities that are interdependent and that interact throughout the project. The PMBOK® Guide, Eighth Edition organizes project management into seven performance domains—Governance, Scope, Schedule, Finance, Stakeholders, Resources, and Risk—which align to the Process domain chapters of RMC's PMP Exam Prep book. *CH 15, pp. 518-522, 524*

Performance measurement baseline (PMB) The collective term for the scope, schedule, and cost baselines created during planning, against which the project manager analyzes and reports project performance. These baselines are components of the project management plan. Changes to the baselines are serious, and the evolution of the baselines should be documented to show when and why changes were made. *CH 4, pp. 114, 137*

Performance reviews A tool for managing procurements that involves analyzing all available data to verify that the seller is performing as required by the contract. Often conducted with the seller present, performance reviews help both parties determine whether changes are needed to improve the buyer-seller relationship, the processes being used, and how the work is progressing compared to the plan. Any changes must be agreed upon in writing. *CH 11, pp. 433, 436, 441*

Performing The fourth stage of Tuckman's ladder model of team formation, in which the team becomes efficient and works effectively together. This is the point at which the project manager can give the most attention to developing individual team members. *CH 9, pp. 336-337*

Persona A concise description of a real or imagined stakeholder model used on agile projects to better imagine how each type of stakeholder will use the end product. A persona may be based on a real person or a combination of characteristics from several types of product users. Personas anchor team understanding in real types of people who will use the product, provide focus for design of specific and relevant product features, and help make team members aware of design choice implications for product users. *CH 8, pp. 290, 314, 321; CH 2, pp. 37, 54-56, 60, 62*

PESTLE A common prompt list framework that organizes risk categories into Political, Economic, Social, Technological, Legal, and Environmental areas. *CH 10, p. 375*

Phase gate An event at the end of a phase in which the results of the completed phase are analyzed against what was planned for that phase. Based on that analysis, options may include redoing the same phase, moving forward with the next phase, or choosing not to continue with the project. *CH 2, pp. 41-42*

Phase-gate system A system for projects that allows the team and stakeholders to pause, evaluate, and approve what has happened so far on the project and then decide to move on to the next phase. Changes may be made to policies and procedures at these milestones that represent updates to the organization's process assets. *CH 12, p. 464*

Plan Communications Management A process that considers the project's overall communications approach, including what systems and processes are already in place and what must be created. This process determines what information will be communicated to whom, when, using what methods, and how frequently, resulting in a communications management plan that guides the project manager and team in managing and monitoring communications throughout the project life cycle. *CH 8, pp. 282-284, 291, 298, 321*

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Plan Risk Management The process of establishing how risk will be approached, managed, and governed on the project by creating the risk management plan. This includes defining roles and responsibilities, setting risk appetite and thresholds, defining probability/impact scales, and deciding how risks will be documented, reviewed, and reported. *CH 10, pp. 378-379, 404-405, 407*

Plan Schedule Management The process that establishes the agreed guidelines and procedures for how the project team will build, manage, and control the project schedule. The output is the schedule management plan. *CH 6, pp. 210-212, 244, 247*

Plan Sourcing Strategy A Focus Areas Model process that determines how required deliverables and services will be acquired. It defines which work will be completed internally (insourced) versus externally (outsourced) and establishes the approach for selecting, contracting, and managing external suppliers or vendors. The output of this process is the sourcing strategy plan. *CH 4, pp. 103-104, 120-121, 146*

Plan Stakeholder Engagement A process that establishes and documents the optimal engagement level for each stakeholder or stakeholder group, and determines when each stakeholder's engagement is needed and when engagement levels and strategies should be reassessed. The main output is the stakeholder engagement plan. *CH 8, pp. 284, 292*

Planning game An eXtreme Programming (XP) practice in which the customer and team collaborate to prioritize features and estimate effort in a shared planning session. The planning game supports value-based prioritization and the product owner role in deciding what gets built. *CH 13, p. 484*

Planning Poker® A common and collaborative game using relative sizing. The goal is to help the team quickly and efficiently reach consensus on reasonable estimates. Each player gets a set of cards with numbers from the Fibonacci sequence. Someone reads a story and each player evaluates it for the work effort they think it requires. All at once, each team member throws down a card (representing a number of story points), the group discusses differences, and they play additional estimating rounds as needed before coming to consensus on the number of points assigned to the story. *CH 6, pp. 223, 225, 244; CH 2, pp. 54, 57, 61-62*

Plurality A group decision-making approach in which the option with the greatest number of votes wins, even if it does not achieve a majority. *CH 6, p. 226*

Portfolio A collection of programs, projects, and related operational work, all prioritized and implemented to achieve a specific business objective and strategic benefits. Programs and projects in a portfolio may not be related other than by their relationship to this common business objective, and a portfolio may include smaller, subsidiary portfolios. *CH 3, pp. 69-70, 90*

Portfolio management The centralized management of a portfolio: selecting, prioritizing, and funding programs, projects, and related operational work based on strategic alignment, obligations, and business objectives so that they best achieve the organization's strategic goals. Within PMI's organizational project management (OPM) framework, portfolio management guides program and project management. *CH 3, pp. 68-70*

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Portfolio manager A person responsible for governance at an executive level of the programs, projects, and operational work that make up a portfolio. *CH 3, pp. 69, 87, 90, 94*

Power/interest grid A stakeholder mapping tool used to group stakeholders based on their level of power over the project and its outcomes relative to their interest in the project. The grid produces four quadrants, each calling for a different engagement strategy: (1) High power, high interest—manage closely; (2) High power, low interest—keep satisfied; (3) Low power, high interest—keep informed; (4) Low power, low interest—monitor. A stakeholder's position on the grid can shift during the project and should be reassessed periodically. *CH 8, pp. 288-289, 318, 321, 323-324*

Preapproved seller list A list of sellers whose qualifications have been thoroughly researched in advance. Bid documents are sent only to preapproved sellers, which speeds up the procurement process. *CH 11, pp. 426, 433*

Preassigned team members Team members assigned to the project before it begins; preassigned resources are listed in the project charter. *CH 9, p. 354*

Preassignment A method of acquiring resources in which resources are assigned to the project before it begins. Preassigned resources are documented in the project charter. Project managers should be alert to the halo effect when preassignments are made. *CH 9, pp. 355, 368*

Precedence diagramming method (PDM) The standard technique for constructing network diagrams. Each activity is represented as a node—typically a box—and arrows drawn between nodes show the dependencies. PDM can represent all four types of logical relationships: finish-to-start (FS), finish-to-finish (FF), start-to-start (SS), start-to-finish (SF). *CH 6, pp. 214, 247*

Predictive analytics An advanced technology that uses historical and real-time data—combined with statistical models, machine learning (ML), and genetic algorithms—to forecast resource needs and performance, enabling more accurate project resourcing, reduced bottlenecks, and improved utilization. *CH 9, pp. 351, 367*

Pre-mortem A risk identification method commonly used by agile teams that involves imagining a future in which the project or iteration has failed and diagnosing why it might have happened. This creates a list of potential future failure points to aid in risk mitigation. *CH 10, p. 382*

Present value (PV) The value today of future cash flows. Due to interest and inflation, the future value of money is different from the present value. Note: the acronym PV is also used for planned value within earned value management, discussed in the Finance chapter. *CH 3, pp. 77-78, 92*

Presentations A formal meeting of the buyer's and seller's teams in which a prospective seller presents their proposal, team, and approach to completing the work. Presentations allow the buyer to assess the team they may hire and to ask questions about competency. They are used most often for procurements that have cost-reimbursable contracts but can be used whenever there is a lot to assess. *CH 11, pp. 430-431, 444*

Preventive action Action taken to deal with anticipated deviations from the performance measurement baseline and other metrics. Knowing when preventive action is needed requires more experience than calculation because the

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project manager is evaluating trends in measurement analysis and anticipating that, if they continue, they could lead to deviation from the baseline or other metrics. *CH 4, pp. 136, 150*

Principle (project management) In the context of project management, a foundational guideline that shapes how project managers think and act; principles guide values-based decision-making, not just process steps. The Standard for Project Management, Eighth Edition identifies six principles (see individual entries in Chapter 12). *CH 15, pp. 518, 523-524*

Principles-based system An approach, complementary to PMI's Code of Ethics and Professional Responsibility, in which the PMBOK® Guide presents project management as a set of principles for delivering value rather than prescribing a single framework or approach. *CH 2, p. 59*

Privity A contractual relationship between parties. When company A hires company B, and company B subcontracts to company C, companies A and C have no privity—meaning company C has no contractual obligation to company A and may not be directed by company A without potential liability implications. *CH 11, p. 423*

Probability and impact matrix A data representation method that plots risks visually to help determine which risks to move forward to quantitative risk analysis. Common subjective analysis scales include Low, Medium, High, and 1-to-5 or 1-to-10 ratings. A diagonal line is drawn through the center of the matrix; risks to the right of the line call for more attention. *CH 10, pp. 380, 384-385, 407*

Process analysis A quality assurance technique that is part of the continuous improvement effort and focuses on identifying improvements that might be needed in project processes. It is often applied at multiple points in a project where activities or work packages are repeated. *CH 4, p. 128*

Process domain One of three performance domains in the Examination Content Outline (ECO); includes the technical project management skills, methods, and activities needed to manage a project and deliver the benefits for which the project was undertaken. Approximately 41% of the exam is based on the Process domain. *CH 2, pp. 37-38, 45*

Process flow diagram An agile modeling technique that diagrams the steps and decision points of a process (for example, a patient's bill payment process) so the team and customer build shared understanding of how the product will work. *CH 8, pp. 315-316*

Procurement A formal procedure to obtain goods and services. From the project manager's perspective, this is the process of creating and maintaining relationships with parties (sellers) to buy products and services outside the organization. The project manager also ensures the purchased goods or services are integrated into a project's product. The procurement relationship is a source of uneven ambiguity in the buyer-seller relationship and risk in projects. *CH 11, pp. 414-416, 418, 420, 422, 424, 426-428*

Procurement statement of work (SOW) A document that describes the complete scope of a specific procurement. Each procurement SOW must be as clear, complete, and concise as possible, and must detail all the work and activities the seller is required to complete—including all meetings, reports, communications, acceptance criteria, and the process of gaining acceptance. It may include drawings, specifications, and technical and descriptive wording. *CH 11, p. 427*

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Product analysis A scope-defining method of analyzing the objectives and description of the product as stated by the customer or sponsor. Translates that information into tangible deliverables using techniques such as systems engineering, value analysis, or value engineering. *CH 5, pp. 176, 202*

Product backlog A living, prioritized list representing everything the team might build, ordered by value. The product owner owns the product backlog and continuously re-prioritizes it based on new learning, stakeholder feedback, and changing business conditions. In adaptive projects, the product backlog IS the change management system: new requirements and change requests are added and prioritized by the product owner rather than processed through a formal change control board. *CH 5, pp. 159, 162-163, 184, 202; CH 2, pp. 55, 62; CH 13, pp. 483-484, 493*

Product management The practice of guiding a product (or service) from idea through development, launch, growth, and eventual retirement in a way that maximizes value for customers and the organization. Any phase of product management may involve a project, but product management and project management are not synonymous. *CH 3, pp. 70, 100*

Product manager A role that acts as the liaison between an organization's business strategy, its design and development subject matter experts (SMEs), and its customers (internal or external). The product manager optimizes value to the customer and return on investment for the organization over a product's life, while a product owner does this in service to a particular project. The product manager may lead product owners within an organization or within the needs of a specific product. *CH 3, pp. 70, 89*

Product owner An agile team member whose focus is prioritizing the backlog with the customer's value needs in mind. The product owner prioritizes the project or product backlog so that the team is able to pull iteration backlog choices that will develop the most valuable increments of the product with each iteration. During an iteration, the product owner answers questions for the development team and continuously reprioritizes the backlog, and participates in planning meetings, iteration reviews, and retrospectives. *CH 13, pp. 484, 496-497; CH 3, pp. 87-92; CH 8, pp. 283, 286, 295, 297, 314*

Product release A ready-to-use product increment that is delivered to the customer. *CH 2, pp. 54, 57*

Product roadmap A visual representation of a product's main components, broken into sequential product releases. Serves as a communication tool, a high-level planning tool, and a reference to confirm and change roadmap components over time. *CH 5, pp. 160-161, 185-186, 204; CH 2, pp. 54-55, 57, 62*

Product scope The product deliverables with their associated features and functions; the requirements that relate to the product, service, or result of the project. It answers the question, "What end result is needed?" *CH 5, pp. 153, 159, 184; CH 12, pp. 457, 459, 461*

Program A group of related projects, sub-projects, and other program-related activities, organized and managed into a coordinated set of efforts. In addition to the work required to complete each individual project, the program also includes a program manager's coordination and management activities. *CH 3, pp. 67-70, 80, 90, 94*

Program evaluation and review technique (PERT) A beta distribution (weighted average) estimating method that gives more consideration to the most likely (M) estimate, using the formula (P+4M+O)/6. This weighted average gives four

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times more importance to the most likely estimate when calculating the expected activity duration or cost. *CH 6, pp. 218, 220-223, 244, 250*

Program governance Governance that coordinates a group of related projects and program activities managed together to obtain benefits not available from managing them individually. Contrast with project governance (directing project management activities to create value aligned with organizational, strategic, and operational goals) and portfolio governance (directing a collection of programs, projects, and operations managed as a group to maximize overall value delivery). *CH 12, p. 457*

Program Increment (PI) In SAFe®, an 8–12-week time-box in which all Agile Release Train (ART) teams plan, execute, and deliver together. The PI is sometimes described as a term for the increment delivered during that time frame, which often contains five sprints. PI planning is a two-day event in which all teams on the ART align on PI objectives, identify cross-team dependencies, and commit to a shared PI backlog. *CH 13, pp. 488-489*

Program management The coordinated management of related projects, sub-projects, and program-related activities to achieve specific benefits and control that could not be obtained by managing the projects individually. Program management supports the organization's strategic goals and is carried out by a program manager, with whom the project manager collaborates when a project is part of a program. *CH 3, pp. 67-68, 70*

Program manager A person responsible for managing a group of related projects combined into programs to provide coordinated control, support, and guidance. The program manager provides oversight to meet both project and program goals. *CH 3, pp. 68, 90, 94*

Progress metrics A type of project report that uses tools such as cumulative flow diagrams and burnup charts to assess performance. *CH 8, p. 307*

Progress report A type of project report that describes what has been accomplished. *CH 8, p. 307; CH 7, p. 265*

Progress reporting The process of analyzing work performance data to help control the schedule and costs and to assess whether the project is on track. Progress reports convey information based on earned value measurement. On agile projects, data gathering and analysis is centered around the backlog and how many features have been developed to date relative to what was planned, using burnup and burndown charts for both the team and other stakeholders. *CH 8, pp. 279, 307; CH 7, pp. 251, 265; CH 6, p. 241*

Progressive elaboration The process of clarifying and refining plans as the project progresses and more information becomes available. With this common tailoring method, the project manager and team plan activities in the detail needed to manage the work just before that part of the project is ready to start. *CH 2, pp. 36, 46-47, 50-51, 61*

Project A temporary endeavor with a beginning and an end that creates a unique product, service, or result. A project is undertaken to drive a change in a product or process from a current state to a future state, to achieve a specific objective, and to create business value for the organization and its stakeholders. *CH 3, pp. 66-69, 71-74, 76-77*

Project approach Also called the development approach. Describes how the work is carried out on a specific project. The project manager selects and tailors the approach based on factors such as uncertainty, risk, complexity, and how

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well scope can be defined early, as well as the type, size, priority, and complexity of a particular project. Project management approaches are described as predictive, adaptive, or hybrid. A predictive approach is also known as plan driven or traditional. An adaptive approach may also be known as agile or change-driven. *CH 1, p. 9*

Project charter A key output of the Initiating focus area that formally authorizes the project. Its purpose is to outline the project at a high level to assess whether it is feasible within the given high-level constraints. The charter also gives the project manager formal authority to use the organization's resources, links the project to business value, and establishes high-level goals and success criteria. It is signed by the sponsor and should be at a high-enough level of detail that it does not need to change as the project progresses. *CH 4, pp. 106-108, 143-144, 146; CH 1, pp. 6, 8, 25; CH 2, pp. 48, 55, 60*

Project coordinator A project manager role within a weak matrix organization who has some authority and can make some decisions but reports to a higher-level manager. *CH 3, p. 73*

Project documents Any project-related documents that are not part of the project management plan. They include artifacts such as the assumption log, issue log, estimates, lessons learned register, team charter, schedule and resource calendars, reports, resource requirements, requirements documentation, change log, agreements, contracts, statements of work, risk register, forecasts, and quality metrics. *CH 4, pp. 119, 140, 146-147*

Project elevator statement (product vision statement) A short description of the project goals and benefits that allows the project manager to explain the project in the span of an elevator ride (30–60 seconds). Also known as a product vision statement or elevator pitch, it conveys the project's purpose and value to any stakeholder. Stakeholders may be involved in creating the elevator statement to help everyone understand the project. On agile projects, this may be called a Product Vision Statement. *CH 8, pp. 291, 295-296, 323*

Project environment The project management approach an organization tends to use, or is using, for a variety of projects at the present time. Some organizations use a single type of project management approach (such as plan-driven or adaptive); others use a variety of approaches across the spectrum from plan-driven to change-driven, and hybrid. The project environment depends on factors such as the type of organization, the types of products or services the organization creates and supports, organizational governance, and the characteristics of the projects the organization needs to complete to achieve its strategic goals and deliver value to its stakeholders. *CH 1, pp. 6, 9, 12, 28*

Project expediter A project manager role within a weak matrix organization who organizes communications and assists administratively but cannot make or enforce decisions. *CH 3, p. 73*

Project float Also known as positive total float, this is the amount of time a project can be delayed without delaying an externally imposed project completion date required by the customer or management, or the date previously committed to by the project manager. Unlike total float, which measures timing flexibility within the network, project float measures flexibility against a fixed external constraint. When project float reaches zero, the project is up against a hard boundary, and any further delay requires either compression or a negotiated change to the deadline. *CH 6, pp. 229, 234, 239*

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Project funding requirements An output of Develop Budget: a timetable showing when the project will require funding from the organization, typically broken out by quarter or by phase. It drives how the organization arranges cash availability for the work. *CH 7, p. 263*

Project governance Governance that aligns project management practices with organizational governance. Project governance can be established and administered by a project management office and may involve defining a project manager's authority and the creation or enforcement of organizational processes and policies regarding areas such as risk, resources, communications, and change management. It may also involve planning and managing project compliance in regulations, security, and safety. *CH 3, pp. 66, 71-72, 95, 99-100*

Project life cycle A description of the phases of work on a project required to produce the deliverables (for example, requirements, design, code, test, implement). Project life cycles range from plan-driven to change-driven and are described as a component of the project management plan. *CH 4, pp. 103, 113, 116, 145*

Project management information system (PMIS) A system, part of an organization's enterprise environmental factors, that includes automated tools such as scheduling software, a configuration management system, shared workspaces for file storage or distribution, work authorization software, time-tracking software, procurement management software, and repositories for historical information. The PMIS is used in many Planning, Executing, and Monitoring and Controlling processes. *CH 3, pp. 66, 86*

Project management office (PMO) A department within an organization that is a customer-centric partner focused on delivering value as experienced by its stakeholders. It tailors its services to align with organizational strategy and the needs of a broad customer base, including executives, project teams, and delivery units. Its role centers on enabling strategic execution, improving delivery outcomes, and supporting better decision-making. The types of PMO are agile, controlling, directive, and supportive. *CH 3, p. 98*

Project management plan An artifact that integrates all the individual management plans into a cohesive whole, creating a centralized document describing what is involved in the project. It includes the performance measurement baseline (scope, schedule, and cost baselines) and describes the project's development approach and life cycle, and how the project will be executed and controlled. The project management plan must be bought into, approved, realistic, and formal. *CH 4, pp. 113, 117-119, 135, 144-147, 150; CH 1, pp. 8, 27-28*

Project management team On large projects, the subset of the project team selected by the project manager to help perform project management activities. Members of this team must have project management training and the group includes the project manager. *CH 3, p. 89*

Project manager The person accountable for ensuring a project meets its objectives and delivers its value and benefits to the organization and its stakeholders. In predictive environments, the project manager gathers information to initiate the project, ensures the project's scope is completed on time and within budget, directs and contributes to planning, and manages the team's work and physical resources. In adaptive environments, the project manager attends to strategic and organizational change considerations while the team focuses on building the product. *CH 3, pp. 71, 73, 77, 86-88*

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Project performance appraisals Evaluations of individual team member performance. The project manager collects information from team members' supervisors and adjusts the project accordingly. An appraisal may also bring to the project manager's attention the need to provide additional training or encouragement. The focus is on the individual's performance of assigned responsibilities, rather than on team performance. *CH 9, pp. 358, 361, 363*

Project performance reviews Periodic formal assessments conducted by the project manager or quality department to evaluate how the project is doing in meeting quality requirements. Involves comparing control measurement results to quality metrics. *CH 5, p. 192*

Project reporting The process of communicating to stakeholders about how the project is going and how it is projected to go in the future. Project reports should be designed to fit the needs of the project, provide information at the level of detail required by stakeholders, include measurements against the performance measurement baseline, use the most appropriate communication method, and be truthful. Types include status reports, progress reports, trend reports, forecasting reports, variance reports, earned value reports, progress metrics, retrospective findings, and lessons learned. *CH 8, pp. 306, 321, 324*

Project resilience The capacity of a project to withstand disruptions, adapt to changing conditions, and regain stability after encountering challenges or unexpected setbacks. *CH 10, p. 410*

Project risk management The process of identifying, evaluating, and planning responses to uncertain events that might occur during the course of a project. The project manager identifies risks and begins to manage them in Initiating and Planning, and frequently reassesses the planned risk strategy while the project is underway. *CH 10, p. 374*

Project schedule The result of previous planning processes and the schedule network analysis that is performed as part of the Develop Schedule process. The project schedule includes project activities with assigned dates for each activity, and includes milestones inserted by the project manager or management. *CH 6, pp. 211-212, 217, 226, 239, 247*

Project scope Encompasses both the product scope as well as all the work the project team will do to deliver that scope, including planning, coordination, and management activities that ensure the product scope is achieved. *CH 5, pp. 153, 160, 176-177, 179-180, 184, 202*

Project scope statement A document that defines what will and will not be done on the project. Typically includes product scope, project scope, list of deliverables, acceptance criteria, what is excluded, and assumptions and constraints. *CH 5, pp. 153, 159, 177, 184, 201-202*

Project selection The process by which an organization chooses which projects to undertake, ensuring each project supports the company's strategic goals. It includes development of a business case and evaluation of specific metrics such as return on investment, present value and net present value, internal rate of return, payback period, cost-benefit analysis, economic value added, and opportunity cost. On the exam, project selection concepts may appear as relevant data, as answers, or as distractors. *CH 3, pp. 77-81*

Project sponsor (project initiator) A person who represents organizational leadership and supports the project, both financially and by helping the project manager and team with decisions outside of the project manager's and team's authority. The sponsor partners with the team to facilitate their success, can protect the project from unnecessary

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changes, and is accountable for ensuring that the project delivers the business value for which it was undertaken. *CH 3, pp. 87, 89, 92, 98*

Project team A group of people, including the project manager, who complete the work of the project. Team members can change throughout the project as people are added to and released from the project. *CH 3, pp. 84, 87, 89*

Project-oriented organization Also called a projectized organization. An organizational structure in which the entire company is organized by projects. The project manager has complete project control, and project resources are assigned to and report to the project manager. Team members complete only project work, and when the project is over, they do not have a department to return to. *CH 3, p. 73*

Prompt list A predetermined, high-level set of risk categories that serves as a structured starting point for risk identification. Rather than asking the team to think of risks independently, the project manager uses the prompt list to systematically walk through each category and ask, "What could go wrong—or go right—in this area?" Common frameworks include PESTLE, VUCA, and TECOP. *CH 10, pp. 375, 381-382, 405, 407*

Proposal evaluation A data analysis technique in which a buyer's proposal evaluation committee uses source selection criteria to assess the ability and willingness of prospective sellers to provide the requested products or services. It provides a basis to quantitatively evaluate proposals and minimize the influence of personal biases. *CH 11, pp. 430, 442, 444*

Prototyping A requirements elicitation technique where a model of the proposed product is presented to stakeholders for feedback. May be updated multiple times to incorporate feedback until requirements have been solidified. *CH 5, p. 151*

Psychologically safe work environment A work environment created by the project manager in which people can ask questions and show incomplete versions of their work without being criticized. This level of trust increases collaboration and helps improve the project. *CH 9, p. 337*

Pull system A workflow management approach in which work is pulled when other work is completed, not pushed by assignment. A team member finishes a task and pulls the next one from the ready queue. Kanban is built on the pull system principle, which is enforced through work-in-progress (WIP) limits. Flow is achieved through the balancing of resources and WIP limits. *CH 13, p. 481*

Purchase order A type of fixed-price contract that is normally unilateral (signed by one party) instead of bilateral (signed by both parties). However, some buyers require the seller's signature on a purchase order before considering it official; in that case, the signature forms the acceptance needed for a contract. Purchase orders are typically used for simple commodity procurements and become contracts when the buyer accepts the terms. *CH 11, p. 419*

Pure risk A risk—such as fire, property damage, or personal injury—for which the response is typically transference, or purchasing insurance. Insurance exchanges an unknown cost impact of a known risk for a known cost impact. *CH 10, p. 392*

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Purpose One of three intrinsic motivators identified by Daniel Pink. Purpose is met by ensuring a cohesive team, a clear project vision, and a common understanding, and by letting people know they're doing a good job and making a difference. *CH 9, pp. 332, 337, 348*

PV (planned value) As of today, what is the estimated value of the work planned to be done? PV looks backward at what was expected to have been accomplished at a given point in time according to the plan. In adaptive projects, PV represents the total story points planned to be completed by a given point in time, typically the end of an iteration or release. *CH 7, pp. 266-271*

Q

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Qualitative risk analysis The first step in deciding which risks need planned responses. A subjective evaluation that involves analyzing all identified risks for their probabilities and impacts on the project. In predictive environments the numbers used to rate each risk are usually on a scale of 1–5 or 1–10, with the meaning of the scale created and agreed upon by the team. Qualitative risk analysis comes before quantitative risk analysis. *CH 10, pp. 380, 383-386, 389, 391, 409*

Quality The degree to which a project and the components of its product fulfill requirements. *CH 5, pp. 153-156, 164, 176-177, 181, 189; CH 12, pp. 452, 459*

Quality assurance Process oversight used to confirm that project processes are being followed—for example, during construction and IT deliverables. *CH 4, pp. 125-126, 128-129, 131*

Quality control Deliverable verification used to confirm that completed deliverables meet requirements—for example, through structural inspections and iterative testing cycles. *CH 5, pp. 188-190, 199, 202, 204*

Quality functional deployment (QFD) A facilitation technique, also referred to as the voice of the customer (VOC), generally used in manufacturing to elicit and prioritize customer requirements. *CH 5, p. 166*

Quality management plan A planning output that documents quality standards, roles and responsibilities for quality management, quality metrics, what will be measured and at what intervals, and strategies for continuous improvement of processes and procedures. *CH 5, pp. 156, 177, 202*

Quality metrics Pre-determined measures used to evaluate project performance. Examples include number of changes, variance in resource utilization, number of items failing inspection, number of software bugs, and scope definition accuracy. *CH 5, pp. 154, 177, 183, 189-190, 202*

Quantitative risk analysis The second step in deciding which risks need planned responses, performed after qualitative risk analysis on risks that require further evaluation. Quantitative risk analysis is based on a measurable rating, such as cost and time, and uses estimates of actual probability and actual monetary value at stake. Its purpose is to determine which risk events warrant a response plan, overall project risk exposure, the quantified probability of meeting project objectives, cost and schedule reserves, and realistic achievable targets. *CH 10, pp. 384, 386, 389-390*

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Questionnaires and surveys A requirements elicitation technique typically used for large groups. Questions are crafted to specifically elicit requirements and expectations from respondents. *CH 5, pp. 165, 169, 192, 202*

Quiet quitting A workplace trend in which team members continue performing at minimum levels without raising concerns or going the extra mile. Proactively monitoring workload signals, checking in individually, and creating psychological safety are effective tools for sustaining engagement and preventing quiet quitting. *CH 9, p. 360*

R

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RACI chart A type of responsibility assignment matrix (RAM) that defines role assignments using the letters R (Responsible), A (Accountable), C (Consult), and I (Inform). Multiple resources may be responsible, informed, or consulted, but only one person is held accountable. *CH 9, pp. 346, 362*

Recognition and rewards A team-development practice in which the project manager appraises performance and provides recognition and rewards in response to the work of the team or individual team members. Effective rewards are based on the project manager's understanding of what is valuable to the person or group being recognized and provide incentive for ongoing achievement. *CH 9, pp. 337, 341, 348, 358-360, 368*

Recognition plan A component of the resource management plan (with the human resources, or team, management plan) that describes how team members will be recognized and rewarded for their contributions and performance. *CH 9, pp. 348-349*

Records management system A system used to keep procurement documentation complete, organized, and accessible throughout the procurement life cycle. Because a contract is a formal, legal document, thorough records must be kept—including every email, payment, and written and verbal communication—and may be critical if procurement-related actions are questioned after the procurement is completed, such as in unresolved claims or legal actions. *CH 11, p. 438*

Reestimating A standard practice of recalculating the estimate to complete for the project at planned times and whenever it seems prudent, using actual performance data to update duration estimates for work that is still unfinished, to ensure the project manager can still satisfy project objectives within the schedule, budget, and other project constraints. *CH 6, pp. 241-242*

Regression analysis A data analysis technique that may be used during project closing to examine project variables—such as the schedule, budget, and risks that occurred—and how they impacted the project and its outcomes, supporting the identification of variances, their impacts, and additional lessons learned. *CH 4, p. 142*

Regulatory compliance Mandatory compliance with laws and regulations. Regulatory compliance is the sole impetus for many projects and is at least a component of many more. It often includes significant work to study and interpret the relevant regulations, research and determine their impact to the organization and its projects, and validate what has been learned before business requirements can be elicited and a solution can be designed and implemented. *CH 12, pp. 453-454*

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Relative sizing A concept in which story points have no value except as measured against other stories in the same project. Comparing two teams' velocities on two different projects is not relevant or useful. *CH 6, pp. 219, 225-226, 250*

Release A group of increments that create a valuable deliverable on the project. An agile project will have one or more releases, each of which will contain one or more increments of customer-visible value. *CH 6, pp. 236-237*

Release planning Planning in which agile teams define one or more upcoming releases, setting goals, selecting and prioritizing features/epics/user stories, and roughly mapping them to upcoming iterations. Release planning is mid-level planning; more detailed than roadmapping, but it is less detailed than iteration planning. *CH 6, pp. 209, 212, 237, 244, 247*

Release slices On a story map, the vertical lines that show the releases (release 1, release 2, and so on). Release slices are sized using the team's velocity rather than arbitrary groupings—for example, at 2 story points per iteration and three iterations per release, each slice has a capacity of 6 points, filled top-down from the highest-value stories—so slice boundaries reflect what the team can realistically deliver per release. *CH 6, p. 236*

Release Train Engineer (RTE) The servant-leader for the Agile Release Train (ART) in SAFe®, functioning like a Scrum Master at the program level. The RTE facilitates Program Increment (PI) planning events, removes cross-team impediments, and keeps the program on track. *CH 13, pp. 488-489*

Request for information (RFI) A type of bid document that may be used before bid documents are created. Responses to the RFI help the buyer identify which companies are qualified to handle the procurement and can collect information on what work is possible for later inclusion in RFPs or IFBs. The purpose of an RFI is to gather information and reduce uncertainty, whereas the purpose of an RFP or RFQ is to buy something. *CH 11, pp. 428, 430, 444*

Request for proposal (RFP) A type of bid document (sometimes called a request for tender) that requests a detailed proposal including information on price, how the work will be accomplished, who will do it (along with résumés, in some cases), and company experience. *CH 11, pp. 428, 430, 444*

Request for quote (RFQ) A type of bid document that requests a price quote per item, hour, meter, or other unit of measure. *CH 11, pp. 428, 430, 444*

Requirements management plan A component of the project management plan that defines how requirements will be gathered, analyzed, prioritized, evaluated, documented, and managed—including how changes to requirements will be tracked and controlled—and specifies what information should be included in the requirements traceability matrix. *CH 5, pp. 160, 176, 201-202, 204; CH 4, pp. 113, 117*

Requirements stability A metric calculated as: (Unchanged requirements ÷ Total requirements) × 100. A high percentage indicates the project is on track; a low percentage signals the need to stabilize requirements or improve change control. *CH 5, p. 194*

Requirements traceability matrix A form of requirements documentation that links requirements to the project objectives and to other requirements to ensure strategic goals are accomplished. Used throughout the project to analyze proposed changes to scope. *CH 5, pp. 160, 164, 173, 176-177, 202*

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Reserve analysis A technique used during cost monitoring and controlling that allows the project manager to identify and apply lessons learned in controlling costs. Reserve analysis involves analyzing where contingency reserves are still necessary, where new reserves are required, and whether management reserve amounts remain appropriate. Both adding and removing reserves from the cost baseline require a formally approved change request. *CH 10, pp. 400, 407; CH 6, pp. 226, 247; CH 7, pp. 260, 265, 272*

Residual risks Risks that remain after risks have been avoided, exploited, mitigated, enhanced, transferred, shared, escalated, and accepted (and related contingency and fallback plans have been created). Known residual risks that are passively accepted should be documented and reviewed throughout the project because their rankings may need to change. *CH 10, pp. 390-392, 394, 405*

Resource breakdown structure (RBS) A hierarchical chart, similar in format to a WBS, that breaks the work down by type of resource needed. *CH 9, pp. 347, 351-352, 356, 364, 367-368*

Resource buffer In the Critical Chain Method, a buffer set at the beginning of the critical chain to ensure it has the essential resources. *CH 6, p. 232*

Resource calendars Calendars that identify organizational work hours and company holidays, showing the availability of potential resources. An input to Estimate Resource Requirements and an output of Acquire Resources; also related to schedule management. *CH 9, pp. 350, 356*

Resource histogram A bar chart that visualizes resource requirements by showing the number of resources needed per time period. It enables the project manager to see spikes in resource demand and compare required resources to availability. *CH 9, pp. 350-351, 369*

Resource leveling A technique used to change a project to minimize the peaks and valleys of resource usage, so that resources are used more evenly over time. A resource histogram can help perform this task. *CH 6, pp. 235, 240, 245, 247; CH 9, pp. 350-351, 353, 366, 368*

Resource management plan A project management plan component that documents roles and responsibilities; team requirements; organizational charts; the process for acquiring human resources; training, team development, and recognition; project team management (including the team charter and ground rules); compliance; safety; the release of human resources; and the recognition plan. *CH 9, pp. 344-345, 348, 353, 367-369*

Resource optimization A set of techniques for finding ways to adjust the use of resources. The two primary techniques are resource leveling and resource smoothing. AI can also create algorithms that recommend optimal resource allocation across activities. *CH 6, pp. 235, 244, 247-248, 250*

Resource smoothing A modified form of resource leveling, where resources are leveled only within the limits of the float of their activities, so the completion dates of activities are not delayed. Resource smoothing cannot change the critical path. *CH 6, p. 235*

Resource-based view (RBV) A planning lens that asks project managers to identify the unique resources and capabilities the project team possesses and to build the project approach around those strengths. RBV frames resources—

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particularly skilled people and specialized knowledge—as strategic assets that create competitive advantage. *CH 9, pp. 346, 348, 367*

Responsibility assignment matrix (RAM) A chart that cross-references team members with the activities or work packages they are to accomplish. The RAM does not show time or when people will do their jobs. *CH 9, pp. 346, 366-371*

Retainage An amount of money—usually 5 percent or 10 percent—withheld from each payment to the seller. This money is paid when the final work is complete to help ensure completion. *CH 11, p. 424*

Retrospective A meeting held at the end of each short, time-boxed iteration in adaptive or hybrid environments (or at the end of a project in predictive environments) in which the members of the development team inspect and adapt their methods and teamwork. During the retrospective, the team discusses: What is going well? What areas could use improvement? What should we be doing differently? A retrospective is an iteration-by-iteration team process improvement, as distinguished from an after-action review. *CH 4, pp. 131, 142, 147-148*

Retrospective findings Routine checks on team process that may be included on an information radiator. In hybrid environments, retrospective findings serve as ongoing lessons learned in addition to supporting continuous team improvement. Retrospective findings at the end of a project contribute to organizational process assets (OPAs). *CH 8, pp. 281, 306-307*

Return on investment (ROI) A project selection measure that determines the potential profitability of an investment by calculating the benefits received in relation to the cost. *CH 3, pp. 69, 77, 85, 88-89, 100*

Risk A probable event that, if it occurs, will negatively or positively affect one or more project constraints. A risk can affect the project team's ability to deliver the value for which the project was chartered and meet the agreed-upon budget, schedule, and quality requirements. A risk is an event that has not yet happened (as distinguished from an issue). *CH 10, pp. 374-376, 378-384; CH 12, pp. 446-447, 450-451, 455, 460, 466, 468*

Risk appetite The general level of risk an individual or organization is willing to accept in pursuit of expected rewards. Risk appetite varies by organization, sponsor, and project type, and is made measurable through risk thresholds. See also risk threshold and risk tolerance. *CH 10, pp. 376, 379-380, 385, 404-406*

Risk averse A term that describes an individual or organization with a very low appetite for the negative impact of threats. *CH 10, pp. 376, 380, 404*

Risk breakdown structure (RBS) A hierarchical chart that looks like an organizational chart and can help the project manager identify and document risk categories. It allows a project manager to represent risk sources into a chart-like structure, which helps answer questions like "What will we find if we regroup the risks by category? By source? By work package?" *CH 10, pp. 381, 384, 402*

Risk burndown chart An agile tool used for planning, managing, and controlling risk. Risk burndown charts allow stakeholders to easily see a risk profile on a project and quickly inform stakeholders whether threats are moving in the right direction (downward) or escalating. *CH 10, pp. 399, 401, 404, 406, 410*

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Risk categories Broad, common areas or sources of risk that similar projects or other people in the organization have encountered. They can include things like technology changes, resource shortages, regulatory hurdles, changes within the internal or external environments, or cultural issues. The phrases "sources of risk" and "risk categories" are used interchangeably. *CH 10, pp. 375, 380-384, 404*

Risk data quality analysis A qualitative risk analysis data analysis technique used to assess the information available on a given risk for accuracy and reliability, to determine if the risk is valid and whether more research is needed to understand it. *CH 10, p. 384*

Risk exposure The combined potential impact of all risks affecting a portfolio, program, or project at a specific point in time. *CH 10, pp. 375-376, 386, 390, 394, 399, 405*

Risk factors Factors the project manager determines when assessing risk: the probability that a risk event will occur (how likely), the range of possible outcomes (impact or amount at stake), the expected timing for the risk to occur in the project life cycle (when), and the anticipated frequency of risk events from that source (how often). *CH 10, p. 376*

Risk management plan The output of the Plan Risk Management process. The plan may include risk strategy, methodology, roles and responsibilities, funding, timing, risk categories, stakeholder risk appetite and thresholds, definitions of probability and impact, reporting, and tracking. *CH 10, pp. 379, 404-405, 407*

Risk of loss A terms-and-conditions clause that allocates the risk between the parties to a contract in the event that goods or services are lost or destroyed during the performance of the contract. *CH 11, pp. 424-425*

Risk owner An individual who watches out for the occurrence of an assigned risk and leads the implementation of preplanned responses. *CH 10, pp. 374, 394, 399, 406*

Risk prone An individual or organization with a higher appetite for risk; a person who would interpret a given rating differently than a risk-averse counterpart. May also be labelled as risk tolerant. *CH 10, p. 380; CH 12, p. 466*

Risk reassessment A monitoring activity in which the team periodically reviews the risk management plan and risk register and adjusts the documentation as required, based on information that becomes apparent once work begins. Reassessing risk is a good topic for a team meeting, a retrospective, or a separate meeting held as part of risk reviews. *CH 10, pp. 400, 402*

Risk register The central document for the entire risk management process; the main artifact resulting from the Identify Risks process. The risk register is continually updated as the risk management processes are completed and the project continues. Contents include identified risks, potential and selected risk responses, risk owners, root causes, risk triggers, potential impacts, and timing of risks. *CH 10, pp. 383, 394, 402, 405-407*

Risk report An artifact updated to communicate the risks of greatest threat or opportunity, overall project risk exposure, anticipated changes, and anticipated outcomes of planned risk responses. *CH 10, pp. 394, 398-399, 405, 407*

Risk response strategies Also known as risk mitigation strategies or strategies for threats and opportunities. Planned responses for each risk, which may involve changing the planned approach to completing the project, including changes

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to the WBS, the quality management plan, resources, schedule, budget, or communications strategies. Strategies for threats include avoid, mitigate, and transfer; strategies for opportunities include exploit, enhance, and share; strategies common to both include escalate and accept. *CH 10, pp. 376, 391, 393-394, 397, 403, 408*

Risk reviews Reviews held regularly to discuss the effectiveness of planned risk responses that have been implemented on the project. Risk reviews may result in the identification of new risks, secondary risks created by risk response plans, and risks that are no longer applicable. Closing of risks allows the team to focus on managing risks that are still open; a closed risk should result in the associated risk reserve being returned to the company. *CH 10, pp. 400, 402*

Risk threshold The specific point at which risk becomes unacceptable. For example, the sponsor will not accept the risk of a schedule delay of 15 days or longer. *CH 10, pp. 376, 379, 391, 398, 405*

Risk tolerance The degree of risk an individual or organization can withstand for a specific project constraint or type of risk, such as cost, schedule, safety, customer satisfaction, or reputation. Tolerance can differ by risk type (for example, an organization may tolerate more cost-related risk than risk to its reputation) and is expressed through risk thresholds. See also risk appetite and risk threshold. *CH 10, pp. 376, 380; CH 12, p. 466*

Risk triggers Events that trigger the contingency response. The early warning signs for each risk on a project should be identified so risk owners know when to take action. *CH 10, pp. 383, 395, 406*

Risk-adjusted backlog In an adaptive environment, a project backlog prioritized not just for features but for the risk responses that have been developed for identified risks. In planning each iteration, agile teams seek to balance delivering the highest-value features and mitigating the biggest threats that remain on the project. *CH 10, pp. 376, 397, 401, 406, 409-410*

Risk-based spike A spike done before an associated increment's development begins to attempt risk mitigation or elimination—or enhancement, if an opportunity is being explored. *CH 10, p. 377*

RMC Resources A web-based RMC resource (rmcls.com/rmc-resources) that provides supplemental material for the learner to work with, as well as errata and other updates to the book. It includes interactive games, more in-depth information on particular topics, a project management glossary, and additional materials published as RMC observes trends relevant to exam prep. *CH 1, pp. 9, 12-13, 33*

Rolling wave planning A form of progressive elaboration in which near-term work is planned in detail while future work is kept at a summary level. As the project moves forward, those future work packages are broken down into detailed activities when enough information is available to do so reliably. This approach is common on adaptive projects, and it is also used on predictive projects where full planning upfront is not yet possible. *CH 6, pp. 213-214, 240, 247; CH 2, pp. 36, 46, 50-51*

Roman voting A group decision-making approach in which people physically show their level of support for a decision with a "thumbs up, thumbs down" voting style. "Thumbs sideways" can also be used for those who are not sure of their vote or have misgivings. *CH 6, p. 227*

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Root cause analysis A tool used to analyze the underlying cause of the current level of stakeholder support and engagement. The project manager and team use it to determine how best to facilitate a change to bring stakeholders' engagement to the desired level. The "5 Whys" technique is a common approach, as is the fishbone (Ishikawa) diagram for visually organizing potential causes across categories such as communication, roles and responsibilities, expectations, and organizational factors. *CH 4, pp. 127-128, 135; CH 8, pp. 290, 295, 310-311*

Rough order of magnitude (ROM) estimate An estimate usually made during Initiating with a typical range of −25 to +75 percent, varying depending on how much is known about the project. ROM estimates are top-down, high-level estimates used to assess project feasibility early in the project. *CH 12, p. 464; CH 1, p. 8*

Rule of seven A general rule (heuristic) used with control charts: a group or series of seven or more data points on one side of the mean. Although none of the points may be outside the control limits, they are not random, and the process is considered out of control; the project manager should investigate and find a cause. *CH 5, p. 193*

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Salience Model A stakeholder mapping tool used to group stakeholders based on three dimensions: the appropriateness of their involvement (Legitimacy), their authority or ability to influence outcomes (Power), and their need for immediate attention (Urgency). A stakeholder who scores high on all three dimensions is a definitive stakeholder who demands immediate, substantive engagement. The value of this model is in revealing which stakeholders deserve priority attention, particularly in complex projects with many competing interests. *CH 8, pp. 288-289, 318, 321, 323-324*

Salvage value The value of an item at the end of its useful life. *CH 3, pp. 80-81*

Scaled Agile Framework® (SAFe®) A management and organizational framework first released in 2011 for coordinating multiple agile teams working toward a shared, large-scale objective. SAFe® integrates Lean principles, agile practices, and systems thinking into a structure that can scale from a handful of teams to hundreds. Its four core values are alignment, built-in quality, transparency, and program execution. SAFe® is organized into five levels: Team, Program, Essential SAFe®, Large Solution, and Portfolio. *CH 13, pp. 474, 476, 488-489, 492, 500-501*

Scatter diagrams A quality tool that tracks two variables to determine their relationship to the quality of the results. A regression line (or trend line) is calculated to show the correlation of variables, which can then be used for estimating and forecasting. *CH 4, p. 127*

Schedule baseline The approved version of the schedule model used to manage the project; what the project and team performance is measured against. On plan-based projects the baseline can only be changed as a result of formally approved changes. *CH 6, pp. 209, 226, 239, 243, 247-248; CH 4, pp. 114, 145*

Schedule compression A set of techniques, including fast tracking and crashing, used to decrease project length. Schedule compression can be used during Planning, and also during Executing and Monitoring and Controlling to evaluate options and manage the impacts of change. *CH 6, pp. 232-233*

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Schedule data All the data used to create the schedule model, including milestones, project activities, activity attributes, duration estimates, dependencies, and the assumptions and constraints used in creating the schedule. *CH 6, pp. 213, 239-240, 247-248*

Schedule forecast The current best estimate of completion based on real progress; it can be updated without changing the baseline. In adaptive work, forecasts are typically derived from iteration/release planning and observed delivery rates (for example, velocity or throughput), not from a single end-to-end plan locked early. *CH 6, pp. 209, 222, 243, 245, 247-248*

Schedule management plan The output of the Plan Schedule Management process. It establishes the agreed guidelines and procedures for how the project team will build, manage, and control the project schedule. It may establish the scheduling methodology and tool, release and iteration length, the level of acceptable accuracy for duration estimates, units of measure, links to organizational procedures, project schedule maintenance, control thresholds, rules for measuring schedule performance, reporting formats, and how vendor and procurement timelines will be incorporated. *CH 6, pp. 211-212, 247*

Schedule model The framework used to generate a project schedule. It includes components like calendars, activity relationships (logic), duration estimates, and any constraints. Together, these components allow the project manager to calculate the start and finish dates for project activities. *CH 6, pp. 209, 211, 239-240, 250*

Schedule performance index (SPI) An earned value metric calculated as EV ÷ PV. SPI measures the rate at which the project is progressing compared to what was planned: the project is (only) progressing at ___percent of the rate originally planned. An SPI greater than one means the project is ahead of schedule; an SPI less than one means the project is behind schedule. *CH 7, pp. 267-271, 274, 277*

Schedule variance (SV) An earned value metric calculated as EV − PV. SV measures how far ahead or behind schedule the project is in terms of the value of work performed. A negative SV means the project is behind schedule; a positive SV means the project is ahead of schedule. *CH 7, pp. 253, 266, 268, 270-271, 274*

Scope baseline In predictive environments, a set of artifacts consisting of the project scope statement, the WBS, and the WBS dictionary. Approved before work begins and used to measure and control scope throughout the project. *CH 5, pp. 178, 184, 189, 201-202; CH 4, pp. 114, 122, 137, 140, 144, 146*

Scope creep A situation in which unplanned changes are allowed to propagate in the project unnoticed, negatively impacting other project constraints such as time or cost. The purpose of change control in predictive projects is to prevent scope creep. *CH 5, p. 155*

Scope creep percentage A metric calculated as: (Unplanned deliverables ÷ Total deliverables) × 100. The ideal is 0%; anything higher means scope additions have occurred outside of the formal change control process. *CH 5, p. 194*

Scope definition accuracy A metric calculated as: (Planned scope items correctly delivered ÷ Total planned scope items) × 100. The ideal is 100%; anything lower indicates a need to ensure alignment with stakeholder requirements. *CH 5, p. 194*

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Scope management plan The primary output of planning scope management; part of the project management plan. Details how scope will be planned, executed, and controlled, including how to achieve overall scope, create the WBS or backlog, manage scope, and obtain acceptance of deliverables. *CH 5, pp. 160, 202*

Scrum The most widely adopted adaptive framework, organized around four formal events within a sprint: Sprint Planning (team selects items from the product backlog and commits to a sprint goal), Daily Scrum (a 15-minute daily synchronization), Sprint Review (team demonstrates the completed increment to stakeholders and collects feedback), and Sprint Retrospective (team reflects on its process and identifies at least one concrete improvement). Scrum has three defined roles: Product Owner, Scrum Master, and Developers (the Scrum Team). *CH 13, pp. 482-484, 488; CH 1, pp. 8-9, 26*

Scrum Master A servant-leader role in Scrum responsible for facilitating the Scrum events, removing impediments, and protecting the team from external interference. The Scrum Master is not a project manager, supervisor, or decision-maker. The Scrum Master does not assign tasks, approve scope changes, or direct the team's technical decisions. *CH 13, pp. 475, 484, 488; CH 3, pp. 87-88*

Secondary risk A new risk created by the implementation of a selected risk response. Secondary risks should be analyzed as part of risk response planning and may require additional risk response planning, including ensuring that the secondary risks are of a lower severity than the primary risk. *CH 10, pp. 392, 394, 400, 405*

Selected sellers The outcome of the procurement process in which a seller has been chosen for each procurement. This means the buyer and seller have agreed and signed off on all terms and conditions of the contract, and work proceeds under the signed agreement. *CH 11, pp. 430, 432, 442, 444*

Self-actualization Maslow's term for the highest level of motivation: contributing, growing, and using one's skills. *CH 9, pp. 332-333, 335*

Self-governance model A team-driven project governance model in which, instead of a PMO leader, a group of project managers (or even the team itself) shares responsibility. In some cases, there is no single official project manager; the team splits those responsibilities. Agile teams are often self-governing. This model works better for flexible, fast-changing projects. *CH 3, p. 72*

Seller The company or person who provides goods or services. A seller may also be called a contractor, subcontractor, supplier, or designer. The PMBOK® Guide primarily uses the term "seller," but the exam may use any of these terms. *CH 11, pp. 415, 419-420, 422, 424-425, 427-428*

Seller proposal (or price quote or bid) An official offer from the seller in response to the buyer's bid documents. A proposal is the typical response to an RFP, a quote is the typical response to an RFQ, and a bid is the typical response to an IFB. RFP and RFQ responses describe how the seller will meet the buyer's request. *CH 11, pp. 430, 440, 444*

Sensitivity analysis A quantitative risk analysis technique that analyzes and compares the potential impacts of identified risks. A tornado diagram may be used to graphically depict the results, with risks represented by horizontal bars—the longest and uppermost bar representing the greatest risk, and progressively shorter bars representing lower-ranked risks. *CH 10, pp. 386-387, 405, 407*

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Servant leadership A leadership approach, contrasted with traditional hierarchical leadership, in which the leader shares power and helps enable those they lead to perform their best and to grow. A project manager acting as a servant leader ensures team members can effectively do the work, removes impediments, continually communicates the project vision, and provides what the team needs to be productive and motivated. *CH 9, pp. 328, 341, 343, 368*

Set-based design An adaptive-environment concept similar to an extensive what-if analysis that involves exploring multiple options, or designs, early in the project and eliminating the ones that won't work. Set-based design creates flexibility and allows teams to develop knowledge as they work through the different options. *CH 10, p. 397*

Share A risk response strategy for opportunities that allocates ownership or partial ownership of the individual or overall project opportunity to a third party (forming a partnership, team, or joint venture) that is best able to achieve the opportunity. *CH 10, pp. 377, 392-394, 403-404, 407, 410*

Sharing ratio A ratio used to express how cost savings or cost overruns under a contract will be shared between buyer and seller—for example, 80/20. The first number represents the buyer's portion and the second number represents the seller's portion. *CH 11, p. 423*

Shu-Ha-Ri model A model of skill mastery originating in martial arts and adopted by agile practitioners, describing three levels of mastering a new skill or process: Shu ("to keep, protect, or maintain"—where the rules are learned and obeyed), Ha ("to detach or break free"—where the rules have been mastered through practice), and Ri ("to go beyond or transcend"—where the rules become second nature and the practitioner can teach and lead others). *CH 9, p. 334*

Sideward influence A direction of stakeholder influence referring to peers—such as other project managers, functional managers, or departments—operating at the same organizational level as the project manager. *CH 8, p. 288*

Simple design An eXtreme Programming (XP) practice of building only what is needed now, avoiding added complexity for requirements that have not arrived yet. Also associated with the principle YAGNI (You Aren't Gonna Need It). Simple design is a form of waste elimination consistent with Lean principles. *CH 13, p. 485*

Single-source procurement A noncompetitive procurement in which there is only one seller who can provide the required goods or services—for example, because they hold a particular patent. The buyer does not conduct a competitive bidding process but still must negotiate to finalize the contract. *CH 11, p. 429*

Situational Leadership II® A situational leadership model developed by Ken Blanchard that focuses on two task-specific variables—competence and commitment—and describes four leadership styles (directing, coaching, supporting, and delegating) that map to different combinations of those variables. *CH 9, pp. 336, 342, 357*

Six Sigma A methodology for achieving organizational process improvement and high levels of correctness with extremely reduced variances. Sigma is a standard deviation from the norm, or from expectations of quality. Six sigma, then, is six standard deviations, representing very high quality or consistency equivalent to only 3.4 deviants per million outputs. *CH 5, p. 155*

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Smoothing (accommodating) A conflict resolution technique that includes making some concessions and emphasizes agreement rather than differences of opinion. It does not result in a permanent or complete resolution of the conflict. *CH 9, pp. 339, 366*

Social need requirements A category of requirements that addresses accessibility, inclusion, and community needs—for example, that a new transit line have accommodations for people with disabilities who cannot drive cars. Listed with business, functional, quality, solution, and stakeholder requirements. *CH 5, p. 164*

Source selection analysis A planning technique used to determine the criteria by which sellers will be evaluated. Project constraints (such as schedule, cost, risk, scope, quality, resources, customer satisfaction) are factors in seller selection. Source selection criteria may be weighted differently depending on whether the buyer is purchasing a commodity, services, or construction services. *CH 4, pp. 121, 146*

Source selection criteria The criteria the buyer will use to evaluate responses from prospective sellers, such as number of years in business, quality of the response, or price. Source selection criteria are defined during procurement planning and included in bid documents so that sellers understand how their responses will be evaluated. *CH 11, pp. 426-431; CH 4, pp. 120-121, 146*

Sourcing strategy plan The output of the Plan Sourcing Strategy process. It includes the results from make-or-buy decisions (insourcing vs. outsourcing) and the rationale for those decisions. It also includes source selection criteria and a contracting strategy. *CH 4, pp. 113, 120-121, 146*

Special provisions (special conditions) Additions, changes, or deletions to a standard contract's terms and conditions that are required to address the unique needs of a specific project. The project manager determines when such adjustments are needed and works with the procurement manager to ensure the resulting contract addresses the needs of the project. Special provisions can pertain to the type of project and project requirements, risk analysis, and administrative, legal, or business needs. *CH 11, pp. 423-424, 437*

Spike Originating from eXtreme Programming (XP), but used in many agile teams now, a spike is a short, time-boxed research task whose purpose is to reduce technical or business uncertainty before committing to a larger piece of work. A spike is a planned investment in learning; its output is knowledge that makes the real work estimable and executable. There are two types: an exploration spike (investigates a business requirement or product design question) and an architectural spike (investigates a technical approach or new technology). *CH 13, pp. 484-485, 493, 496; CH 2, pp. 44, 61-62; CH 10, pp. 377, 406, 408-409*

Sponsor engagement The practice of actively managing the relationship with the project sponsor, who holds formal authority over the project including funding approval, charter sign-off, and escalation decisions. Effective sponsor engagement means keeping the sponsor informed of project status, risks, and issues at a level appropriate to their role. The project manager should establish a regular communication cadence, present issues with a recommended course of action, and seek the sponsor's help in clearing organizational obstacles. A disengaged or unavailable sponsor is itself a project risk. *CH 8, p. 301*

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Sprint The Scrum term for an iteration: a short, time-boxed period of focused work that ends with a deliverable increment. Sprint is synonymous with iteration in generic agile terminology. *CH 13, pp. 474, 482-484, 489, 494*

Sprint backlog The subset of the product backlog that the team commits to completing during one sprint. The sprint backlog is owned by the development team and is distinct from the product backlog, which is owned by the product owner and contains all potential future work. *CH 13, pp. 475, 483-484*

Sprint planning The Scrum event (called iteration planning in generic agile terminology) in which the team selects items from the product backlog, commits to a sprint goal, and builds the sprint backlog. *CH 13, p. 483*

Sprint retrospective The Scrum event (called an iteration retrospective in generic agile terminology) in which the team reflects on its process and identifies at least one concrete improvement for the next sprint. *CH 13, p. 483*

Sprint review The Scrum event (called an iteration review or demo in generic agile terminology) in which the team demonstrates the completed increment to stakeholders and collects feedback. *CH 13, p. 483*

Stakeholder Anyone who will be impacted by the project or may positively or negatively impact the project. This includes the customer or end user, the project manager and team, the project's sponsor, program and portfolio managers, the project management office, functional or operational managers, other departments or groups within the organization, and external sellers that provide services or materials for the project. *CH 8, pp. 280-286, 288-290; CH 3, pp. 75, 85, 87, 90-93, 97, 99; CH 12, pp. 456, 458, 465, 470*

Stakeholder cube A three-dimensional stakeholder mapping model used to represent dimensions or aspects of a stakeholder group. It extends the idea of a salience model by adding a third axis (attitude or engagement level) to the power/interest grid, creating eight possible combinations that help the project manager further tailor engagement strategies to account for multiple stakeholder attributes simultaneously. *CH 8, pp. 288-289, 324*

Stakeholder engagement A performance domain—not a one-time process—that runs from the first conversation about the project all the way to the final handoff. It involves satisfying stakeholders as a project objective, regularly communicating with them, listening carefully to what they say, balancing competing interests, and keeping stakeholders appropriately involved in the decisions that affect them. Stakeholder engagement requires well-thought-out communications and continuous interaction throughout the project life cycle. *CH 8, pp. 281-282, 284-286, 292, 297-298, 300, 303*

Stakeholder engagement assessment matrix A data representation tool used to compare stakeholders' current and desired level of engagement. For each stakeholder, the matrix marks their Current (C) and Desired (D) engagement level across five categories: Unaware, Resistant, Neutral, Supportive, and Leading. Any gap between C and D signals that an engagement strategy is needed. The matrix is used both in planning and in monitoring stakeholder engagement. *CH 8, pp. 294-295, 310, 323-324*

Stakeholder engagement levels (unaware, resistant, neutral, supportive, leading) The five engagement levels marked across the columns of a stakeholder engagement assessment matrix: Unaware (does not know the project exists or its potential impact), Resistant (aware but opposed to the project or its outcomes), Neutral (aware but neither supportive nor resistant), Supportive (aware of and favorable toward the project), and Leading (actively engaged and advocating for

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the project's success). For each stakeholder, current (C) and desired (D) levels are marked; any gap signals that an engagement strategy is needed. *CH 8, pp. 294-295*

Stakeholder engagement plan The main output of the Plan Stakeholder Engagement process that aids the project manager in the planning, managing, and monitoring of stakeholder engagement. It includes existing and desired engagement levels for all stakeholders with plans to achieve desired levels, details about ways stakeholders will be involved in the project, and guidelines and metrics for monitoring and evaluating how well the plan is meeting stakeholder and project needs. *CH 8, pp. 297, 310, 314, 321-322*

Stakeholder mapping A data representation method that maps stakeholder attributes into categories. The project manager uses this method to analyze and plan how the project team will prioritize efforts to build relationships and engage stakeholders. Examples include the power/interest grid, stakeholder cube, and salience model. Stakeholders can also be grouped by directions of influence: upward, downward, outward, and sideward. *CH 8, pp. 288, 321*

Stakeholder register A document that compiles information about all identified stakeholders. It is a key output of the Identify Stakeholders process and an important input to planning processes including Plan Stakeholder Engagement and Plan Communications Management. The register may include each stakeholder's name and title, supervisor, project role, contact information, major requirements and expectations, assessment information, impact and influence, attitude regarding the project, and stakeholder classification. The stakeholder register is updated throughout the project. *CH 8, pp. 291, 321-323*

Stakeholder satisfaction A measure of how well the project is meeting stakeholder requirements and expectations. It is distinct from project performance against scope, schedule, and cost baselines—a project can be on time and on budget and still have dissatisfied stakeholders if their expectations were not properly identified and managed. Stakeholder satisfaction can be assessed through surveys, interviews, observation of behavior, and review of feedback logs, and must be monitored throughout the project, not just at the end. *CH 8, pp. 309-311, 320, 324*

Stakes What a stakeholder has at risk or invested in the project. Examples of stakes include: Ownership (a stakeholder may have to sell property); Knowledge (a stakeholder may be the expert on a legacy system being upgraded); Rights (a stakeholder may be concerned about environmental impacts); Regulations (a government official may be responsible for ensuring compliance); Interest (a community may be concerned about increased traffic); and Contribution (a resource manager may be concerned about team members' capacity to handle project work alongside operational duties). *CH 8, pp. 280, 282-284, 286, 288-292*

Standard contract A contract commonly created by the buyer, usually drafted—or at least reviewed—by lawyers, and generally not requiring additional review if used for the purpose for which it was intended. The project manager should understand standard contracts and also recognize when special provisions are required. *CH 11, pp. 423, 426, 430*

Start-to-finish (SF) A logical relationship in which an activity must start before the successor can finish. This dependency is rarely used. *CH 6, p. 215*

Start-to-start (SS) A logical relationship in which an activity must start before the successor can start. *CH 6, p. 215*

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Statistical sampling Inspecting a representative portion of a population rather than every item. Used when inspecting everything would take too long, cost too much, or be too destructive. Sample size and frequency are determined in planning. *CH 5, p. 191*

Status report A type of project report that describes project performance compared to the performance measurement baseline. *CH 8, pp. 298, 304, 307, 317*

Steering committee A governance meeting or body of senior stakeholders that provides oversight and approval for the project. Listed among predictive stakeholder engagement meetings (with kickoff, project review, risk review, status, and lessons learned meetings), it is a common escalation point for changes that exceed the project manager's or product owner's tolerances. *CH 8, p. 301; CH 9, p. 365*

Stewardship Responsibly managing project resources, outcomes, and impacts—ensuring ethical use and alignment with organizational and societal expectations. As a project management principle, stewardship is about acting with care and integrity, and establishing and maintaining trust. It includes the careful use of resources entrusted to the project manager by the organization and stakeholders, and it extends to environmental resources and the professions the project manager practices. *CH 12, pp. 447, 455, 470, 472*

Storming The second stage of Tuckman's ladder model of team formation, in which there are disagreements as people learn to work together. *CH 9, pp. 329, 336-337, 341, 357*

Story In adaptive environments, a small unit of requirement or functionality, usually expressed as a user story. Large requirements (epics) are decomposed into features and then sliced into stories that are small enough to estimate (for example, with Planning Poker) and complete within an iteration. Each story has a definition of done and acceptance criteria. See also User stories. *CH 5, pp. 175, 184-185; CH 2, pp. 57, 61; CH 6, p. 236*

Story maps The adaptive equivalent of a network diagram. This visual tool shows the user journey from left to right and the workflow from top to bottom. Components include the backbone (epics in the order the user would do them), the walking skeleton (end-to-end stories needed to deliver usable portions of the product), additional user stories ordered from highest to lowest value/criticality, and release slices indicating planned releases. Story maps differ from network diagrams in that the focus is on the user *CH 6, pp. 208, 236-237*

Story point A subjective unit of measurement in agile projects to estimate the total relative effort, complexity, or risk required to complete a backlog item or user story. Methods of estimating story points include t-shirt sizing, planning poker, and other affinity estimating techniques. Importantly, a story point is not relative to any unit of time. *CH 6, pp. 211, 219, 223, 225-226, 236-237, 239, 244; CH 7, pp. 260, 262-263, 265; CH 13, pp. 475, 480*

Story slicing Decomposing features from feature-level (high-level) descriptions into smaller chunks of functionality called stories. *CH 2, p. 61*

Storytelling A knowledge management tool and technique used in Manage Project Knowledge in which team members share experiences and lessons as narratives to transfer tacit knowledge. It is used alongside after-action reviews, in-progress postmortems, and retrospective meetings. *CH 4, p. 147*

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Straight-line depreciation A method of depreciation in which the same amount of depreciation is taken each year. *CH 3, pp. 80-81*

Strong matrix A form of matrix organization in which power rests with the project manager, though the functional work continues. *CH 3, p. 73*

Structured governance model A project governance model with a clear hierarchy that typically includes an executive sponsor, a PMO leader, a governance board, and a project manager. The project manager keeps everything on track and makes sure all parts of the project work together smoothly. Structured governance is more common in predictable, well-defined projects, where oversight comes from within or outside the organization. *CH 3, p. 72*

Sunk costs Expended costs—that is, costs that have already been spent. Sunk costs should not be considered when deciding whether to continue with a troubled project. *CH 3, p. 80*

Supporting (leadership style) A Situational Leadership II® style characterized by low direction and high support. Used when competence is solid but confidence is inconsistent. *CH 9, pp. 328, 332, 336, 344, 355, 363, 367, 369*

Supportive project management office (supportive PMO) A PMO that provides the policies, methodologies, templates, and lessons learned for projects within the organization. It typically exercises a low level of control over projects. *CH 3, pp. 75-76*

Sustainability A principle that encompasses environmental responsibility, social equity, and economic viability—often referred to as the "triple bottom line." Modern project governance must incorporate sustainability considerations throughout the project life cycle. *CH 12, pp. 447, 457, 460, 467-470, 472; CH 3, pp. 71, 95-98, 100*

Sustainable contracting An approach to procurement contracts in which environmental, social, and governance (ESG) expectations are written directly into the agreement, specifying what the seller must do, how performance will be measured, and how the buyer will verify that commitments have been met. Sustainability requirements must be explicitly written into the procurement SOW and contract terms; if they are not in the contract, the seller has no obligation to meet them. *CH 11, p. 440*

Sustainable pace An eXtreme Programming (XP) practice and an Agile Manifesto principle (Principle 8) stating that teams should work at a pace they can maintain indefinitely. Team members' working overtime is a warning sign of unsustainable pace, not a solution. An unsustainable pace is a project management problem that requires the project manager to investigate the root cause, adjust scope or timeline to restore sustainability, and advocate for the team with sponsors. *CH 13, pp. 485, 491, 495*

SWOT analysis A data gathering and analysis technique—strengths, weaknesses, opportunities, and threats—used in Identify Risks (with brainstorming, checklist analysis, documentation reviews, interviewing, prompt lists, and root cause analysis) to identify project risks. *CH 10, p. 382*

System The whole web of people, process, technology, information, and decision rules that, together, produce outcomes, often in ways that cannot be predicted by looking at one part alone. Components may include people, processes, technology, policies, information, and governance mechanisms; some components can operate alone, but

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their purpose and performance are best understood in how they connect with the rest of the system. *CH 12, pp. 447-448, 456-457, 459, 469, 471*

Systems thinking Viewing a project as an interconnected whole, understanding relationships and patterns among its parts to manage complexity and deliver value effectively. Systems thinking is about the project manager's constant proactive response to a system's dynamic and changing circumstances. *CH 12, p. 447*

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Tacit knowledge Knowledge that may provide context or explanation to explicit knowledge. It is not easily documented. It includes emotions, experience, and ability, which are difficult to communicate in words and symbols but can be learned through job shadowing or apprenticeship. *CH 4, pp. 132-133*

Tailoring The project manager's determination of which processes and artifacts are used and the extent to which they are to be used, based on the needs of the project. Tailoring the processes and the project work is part of developing the project management plan. Tailoring decisions are informed by the organizational governance environment; project context and characteristics; development approach; industry and regulatory requirements; roles, authorities, and PMO involvement; governance processes and artifacts; degree of self-governance for teams; and the timing and adaptability of governance. *CH 4, pp. 111, 143-144, 146; CH 3, pp. 75, 95, 100; CH 12, pp. 466, 472*

Target-cost contract A contract that sets an agreed-upon target cost for the work, along with a mechanism for sharing any cost savings or cost overruns between the buyer and seller. This contract type is designed to encourage efficiency and cost control, balancing risks between parties while maintaining the flexibility needed when exact scope, terms, and/or costs are difficult to predict. Cost savings and overruns are shared between buyer and seller according to a predetermined ratio, creating an incentive for both parties to work together to control costs. This type is commonly seen in large infrastructure projects, complex manufacturing, and defense procurement. *CH 11, pp. 418, 420-421, 425, 444*

Task board A visual board, physical or electronic, that displays the status of work items (such as stories or tasks) in columns from ready to done, making workflow and progress visible to the team and stakeholders. A kanban board is a type of task board that also limits work in progress. Task boards are used on adaptive projects, can be added to predictive projects in a hybrid approach, and a team-owned task board can replace daily status reports. *CH 8, p. 308; CH 2, p. 58; CH 15, p. 543*

TCPI (to-complete performance index) An earned value metric calculated as (BAC − EV) ÷ (BAC − AC). TCPI answers the question: 'To stay within budget, what cost performance rate must be achieved for the remaining work?' It divides the value of the work remaining by the money remaining to do it. A TCPI greater than one is bad (the required efficiency is higher than current performance); a TCPI less than one is good. *CH 7, pp. 267-268, 272, 276, 278*

Team assessments Formal and informal evaluations of the team as a whole, meant to evaluate and enhance the team's overall effectiveness. Assessments may analyze how much team members' skills have improved, how well the team is performing, interacting, and dealing with conflict, and how the team is progressing through the stages of team development. *CH 9, pp. 358, 361, 368*

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Team building A resource management practice that helps form the project team into a cohesive group working for the best interests of the project. Team building requires concerted effort and continued attention throughout the life of the project and should start early. Activities include involving team members in planning, taking classes together, retrospectives, collaborative problem-solving, milestone parties, celebrations, and skills assessments. *CH 9, pp. 341, 358-359*

Team charter A working agreement developed by the members of the project team that describes the approach the team will take regarding communications, decision-making, and conflict resolution, as well as ground rules for team meetings. The team charter is a project document that can be referenced at any time during the project. *CH 9, pp. 349, 368; CH 2, pp. 47, 49-50, 54-55, 60-62*

Team culture The values, habits, and relationships that develop within a team. The project manager plays an important role in developing a positive team culture by leading by example: transparency enacted through proactive information sharing, integrity through keeping commitments, respect through active listening, and positive interactions through acknowledgment of contributions. *CH 9, pp. 359-360*

Team engagement The degree to which team members are committed to the project's goals, willing to collaborate openly, and motivated to produce quality work. The project team itself is a stakeholder group whose requirements, expectations, and levels of engagement must be actively managed. To build and sustain team engagement, the project manager involves team members in planning and decision-making where appropriate, establishes clear roles and expectations, celebrates progress, and creates a psychologically safe environment where concerns can be raised without fear. *CH 8, pp. 302, 320*

Team lead A term generally considered synonymous with "agile coach." *CH 3, pp. 87-88, 92*

Technical performance analysis A monitoring technique that uses project data to compare planned versus actual completion of technical requirements to determine whether there is any variance from what was planned. Any variance could indicate possible risks to the project, either opportunities or threats. *CH 10, pp. 401, 407*

TECOP A common prompt list framework that organizes risk categories into Technical, Environmental, Commercial, Operational, and Political areas. *CH 10, p. 375*

Termination for cause A type of contract termination that occurs when the seller defaults—that is, does not perform according to the contract. In a termination for cause, the seller is generally paid for completed work but not for work in progress, and the seller may also be subject to claims from the buyer for damages. *CH 11, p. 438*

Termination for convenience A type of contract termination in which the buyer ends the contract because they no longer want the work done, even if the seller is not in default. In a termination for convenience, the seller is usually paid for work completed and work in process. *CH 11, p. 438*

Terms of reference (TOR) The term used for a procurement SOW when the procurement is for services rather than products. It includes the work the seller will perform, standards the seller is expected to achieve, required meetings and reporting, acceptance criteria, and the data and services that will be provided to the buyer. *CH 11, p. 427*

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Test-driven development (TDD) An eXtreme Programming (XP) practice in which a failing test is written first, then just enough code is written to pass it. Quality is built in from the start rather than added later, and waste is eliminated. TDD is consistent with the Lean principle of 'Build Quality In' and is also a core quality practice in SAFe®. *CH 13, pp. 485, 489*

Theory of constraints (TOC) Eliyahu Goldratt's theory that every system has one bottleneck that limits its overall throughput, and improving anything other than that bottleneck is wasted effort—like a chain that is only as strong as its weakest link. Find the constraint, get the most out of it, and only then consider adding capacity elsewhere. TOC connects directly to flow-based thinking and Kanban; WIP limits are, in effect, a way of exposing the constraint. *CH 13, p. 479*

Theory X A worker motivation theory (McGregor) held by managers who believe people need to be watched every minute, are incapable, avoid responsibility, and avoid work whenever possible. *CH 9, pp. 332, 342*

Theory Y A worker motivation theory (McGregor) held by managers who believe people are willing to work without supervision, want to achieve, and can direct their own efforts. It is a PMI-ism that team members behave according to Theory Y unless a question indicates otherwise. *CH 9, p. 332*

Theory Z (Maslow) Maslow's extension of motivation theory, proposing a dimension that transcends goal orientation or intrinsic motivation. Motivation is linked to self-realization, values, and a higher calling. *CH 9, p. 332*

Theory Z (Ouchi) Ouchi's version of Theory Z, which focuses on the well-being of employees and their families. A job for life that takes care of employees promotes morale and productivity. *CH 9, p. 332*

Threats Risk events that can go wrong—negative impacts on the project. Threats are negative risks. *CH 10, pp. 375, 388, 391, 395, 398, 401*

Three-point estimating An estimating technique that better accounts for uncertainty by considering what could go right (opportunities) and what could go wrong (threats). Estimates are identified as optimistic (O, best-case duration if everything goes well), most likely (M, most probable duration under normal conditions), and pessimistic (P, worst-case duration if significant problems occur). There are two calculation methods: triangular distribution and PERT. *CH 6, p. 220*

Throughput A Kanban metric measuring the number of work items completed per time period. Used alongside cycle time and lead time to forecast delivery and identify process problems in flow-based adaptive delivery. *CH 13, pp. 476, 479, 481-482; CH 6, pp. 209, 239, 244, 249*

Time and material (T&M) contract A contract in which the buyer pays on a per-hour or per-item basis, taking on the majority burden of risk. These contracts are frequently used for service efforts in which the level of effort cannot be defined when the contract is awarded. A T&M contract has elements of both a fixed-price contract (in the fixed price per hour) and a cost-reimbursable contract (in the material costs and the fact that the total cost is unknown). T&M contracts typically have simpler terms and conditions to allow for quick negotiations so that work can begin sooner, and are best used for work valued at small dollar amounts and lasting a short amount of time. *CH 11, pp. 419, 422; CH 13, pp. 495, 497-498*

Timeboxing For an agile project, a short fixed period of time set for the team to complete a selected and prioritized set of activities. The timebox (iteration) is honored; uncompleted work is returned to the backlog. *CH 5, pp. 156, 204*

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Top-down estimating Also known as analogous estimating. An estimating approach that is quick to produce, does not require activities to be identified, and is less costly to create than bottom-up estimating. Top-down estimates are used early in the project during Initiating to provide cost constraints for evaluating high-level project feasibility. They have a lower accuracy level, reflect limited information about the project, and are difficult to apply for projects with high uncertainty or without similar prior projects to reference. *CH 7, p. 260*

Tornado diagram A graphical depiction of the results of sensitivity analysis. Risks are represented by horizontal bars, with the longest and uppermost bar representing the greatest risk and progressively shorter bars representing lower-ranked risks. The resulting graphic resembles a funnel cloud, or tornado. *CH 10, p. 387*

Total float The amount of time an activity can be delayed without delaying the project end date (or an intermediary milestone) while still adhering to imposed schedule constraints. *CH 6, pp. 209, 216, 229, 232*

Total quality management (TQM) A continuous improvement approach that encourages companies and employees to focus on finding ways to continuously improve the quality of their products and business practices at every level of the organization. *CH 5, p. 155*

Training Instruction that team members may require to perform on the project or to enhance their performance. Training can decrease overall project cost and schedule through increased efficiency. If training benefits the organization long-term or can be used on future projects, it may be covered as an organizational cost; otherwise, it is paid for by the project and documented in the resource management plan. *CH 9, p. 359*

Transfer (deflect, allocate) A risk response strategy for threats in which the project manager transfers the risk to a third party by purchasing insurance, performance bonds, warranties, or guarantees, or by outsourcing the work, making an outside party responsible for managing the risk. There is a strong connection between risk and procurement; transference of risk is included in the terms and conditions of the contract. *CH 10, p. 392*

Transition Model (Bridges) A change model developed by William Bridges and first published in 1980 in his book Transitions: Making Sense of Life's Changes. It provides an understanding of how people transition through a change—a psychological process in which people gradually accept their new situation—through three stages: (1) ending, losing, and letting go; (2) the neutral zone; and (3) the new beginning. *CH 12, pp. 465, 472*

Transition state The set of current, transitional, and future operational states, helping plan how project outputs move into the operational environment while meeting compliance requirements. *CH 12, p. 449*

Transitions The handoff of products or services built during a project to the customer or operations teams. Transitions may be included in the project as a phase or product increment, or if transition needs are numerous and complex, they may be a separate project in a program. In either case, transitions require that the project manager has a sophisticated understanding of the business environment in which the project is taking place. *CH 4, pp. 110, 134, 141-143, 147, 150*

Trend analysis A procurement monitoring technique that determines whether performance is getting better or worse. It can be used to determine whether preventive actions can prevent significant variances in the future and to develop forecast estimates and estimate at completion. *CH 11, pp. 434, 441*

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Trend report A type of project report that examines results over time for performance improvement or decline. *CH 8, p. 307*

Triangular distribution A three-point estimating method calculated using the formula (P+O+M)/3. The use of simple averaging gives equal weight to each of the three-point estimates (P=pessimistic estimate, O=optimistic, M=most likely) when calculating the expected activity duration or cost. *CH 6, pp. 220-222*

Trust The team's confidence that the project manager is working in the best interests of the project, the company, and the team. Trust is gained or lost from the project manager's first interaction with each team member. Without trust, the team will not easily take direction, and the project will suffer. *CH 9, pp. 337, 357*

T-shaped skills A metaphor for team members with a broad range of skills alongside deep expertise in a core competency. Hybrid and agile projects prefer T-shaped people, who can share workload and adapt to changing project needs, helping optimize value by reducing bottlenecks. *CH 9, p. 335*

T-shirt sizing A form of affinity estimating, or grouping like items together, in which the team estimates product features and user stories early in the project at a high-level (coarse-grained) level, using t-shirt size labels (XS, S, M, L, XL, XXL) to map out the overall project effort without generating thorough estimates. *CH 6, pp. 219, 223, 244*

Tuckman's ladder model of team formation A model that formally identifies the stages of team formation and development: forming, storming, norming, performing, and adjourning. New teams may go through each step, while teams that have worked together before may experience a shortened version, possibly skipping some of the early steps. *CH 9, pp. 336-337*

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Upward influence A direction of stakeholder influence referring to stakeholders such as the sponsor, executive leadership, or governance bodies who have authority over the project. *CH 8, p. 288*

User stories Short, stakeholder-written descriptions of functionality in the format: "As a <role>, I want <functionality/goal> so that <business benefit>." Used in agile projects to capture requirements and define the definition of done and acceptance criteria. *CH 5, pp. 154, 166, 172, 175, 202*

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VAC (variance at completion) An earned value metric calculated as BAC − EAC. VAC answers the question: as of today, how much over or under budget do we expect to be at the end of the project? A negative VAC means the project is forecasted to finish over budget; a positive VAC means the project is forecasted to finish under budget. *CH 7, pp. 266-268, 270*

Value The benefit derived from a project's outputs and outcomes—what stakeholders and the organization gain beyond simply producing deliverables. "Focus on value" is one of the six PMBOK® Guide, Eighth Edition principles: the whole

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reason a project exists is to create value, so the project manager continuously asks whether the business case is still valid and surfaces changes through governance, while also avoiding overdelivery (doing more work than the value justifies). *CH 12, pp. 446-449, 455, 457, 460-461, 466*

Value (principle) A project management principle in which project managers continue throughout the project to ensure that it and its product are aligned with the organization's business objectives. A project is a system of value delivery. *CH 13, pp. 474, 490-491, 501; CH 12, p. 467; CH 15, p. 518*

Value breakdown structure (VBS) Similar to a WBS, but emphasizes the value assigned to each work package by linking deliverables to the value they are expected to create (e.g., dollars of revenue, benefits delivered). Used when scope needs to be prioritized based on value. *CH 5, pp. 187-188*

Value chain The end-to-end set of activities an organization uses to create, deliver, and support a product or service within the value delivery system. It shows how value is created step-by-step, including where work is performed, where handoffs occur, and where constraints or waste can slow delivery. *CH 12, p. 448*

Value delivery The ongoing process of ensuring that the project produces outcomes that are genuinely useful and beneficial to stakeholders—not just outputs that meet a specification. In adaptive environments, value delivery is continuous: each iteration produces a working increment that stakeholders can see, evaluate, and react to. In predictive environments, value delivery is assessed at key milestones and at project close. In all environments, the project manager's responsibility is to keep value—not just deliverables—at the center of every stakeholder conversation. *CH 8, p. 297*

Value delivery office An office sometimes found in adaptive environments that is focused on the outcomes and flow of value. *CH 3, p. 75*

Value delivery system The set of interrelated components (people, processes, governance, and technology) that work together to create, deliver, and sustain value. It includes the flow from idea to deliverables to outcomes to benefits realization. Within the value delivery system, value is created through the organization's value chain. *CH 12, pp. 447-448, 457, 472*

Value stream The sequence of activities that delivers value to a customer, from request through delivery and realization of benefits. *CH 12, pp. 448, 458-459, 471-472*

Value-driven prioritization A key adaptive concept requiring the product owner and stakeholders to continuously ask: what is the most valuable thing to build next? The product backlog enforces this discipline by keeping all work ranked by value, so the team is always building what matters most. Research suggests that a large proportion of features built in typical applications are rarely or never used; value-driven prioritization directly addresses this by ensuring effort is focused on what stakeholders will actually use. *CH 13, p. 494*

Value-stream mapping A Lean technique used to visualize and analyze the end-to-end flow of work that delivers value to a customer or stakeholder. The team maps the steps (and the wait time between steps) from request to delivery to identify waste, bottlenecks, handoffs, rework loops, and delays, and then uses those insights to improve flow and efficiency. *CH 12, pp. 448, 459, 471-472; CH 13, pp. 477-478*

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Variable costs Costs that change with the amount of production work. Examples include materials, supplies, and wages. *CH 7, p. 257*

Variance report A type of project report that compares actual results to performance measurement baselines. *CH 8, p. 307*

Velocity A Scrum and adaptive delivery metric tracking the amount of work a team completes per iteration. Velocity is used to forecast future delivery, support sprint planning commitments, and measure team performance over time. Velocity is one of the adaptive alternatives to earned value for measuring progress in iterative environments. Importantly, velocity should only be calculated based on historical information from two or more sprints of the current team and project. *CH 6, pp. 219, 236-237, 239; CH 2, pp. 54, 57, 62; CH 13, pp. 475-476, 480, 484, 488-489, 495-496*

Virginia Satir Change Model A change model first published in 1991 by psychotherapist Virginia Satir. Originally designed to improve relationships and communication within family units, it is also used by organizations to plan changes by anticipating expected impacts on stakeholders. The Satir Model acknowledges that performance may initially decline before improving but will eventually get better with clear communication and support. *CH 12, pp. 465, 472*

Virtual reality (VR) An advanced technology that creates an immersive, realistic view of the project work, helping project teams make more accurate judgments about the types, quantities, and characteristics of required resources. *CH 9, pp. 351, 367*

Virtual team A team configuration necessitated by geographic distance, relying on technology for communication. Virtual teams allow the project manager to negotiate for the best resources without regard to location, and many people value remote work as a personal benefit, but they can be more challenging to manage because of communication issues and differences in schedules, languages, or culture. *CH 9, pp. 344, 354-355, 358, 360-361, 368*

Voting A group decision-making technique used to resolve conflicting requirements. May aim for unanimity, majority (more than half support), or plurality (largest number of supporters). PMs should be careful when key stakeholders are in the minority. *CH 5, pp. 166, 197*

VUCA A common prompt list framework that organizes risk categories into Volatility, Uncertainty, Complexity, and Ambiguity areas. *CH 10, p. 375*

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Waivers Statements in a contract specifying that rights under the contract may not be waived or modified other than by express agreement of the parties. The project manager must understand that rights can be intentionally or unintentionally surrendered through conduct, inadvertent failure to enforce, or lack of oversight, and must therefore understand and enforce all aspects of the contract. *CH 11, p. 425*

Walking skeleton In a story map, the component that contains the end-to-end stories that are needed to deliver usable portions of the product to the user. *CH 6, pp. 236-237*

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Watch list A list of risks that currently do not warrant planned risk responses, but with the understanding that any of these risks could become more probable and need a planned response. *CH 10, pp. 374, 389, 397-398, 405-406*

WBS dictionary Documentation providing the details needed to build each work package in the WBS. Lists acceptance criteria, schedule milestones, durations, interdependencies, and other work package information. Helps prevent scope creep. *CH 5, pp. 178, 180, 182-184*

Weak matrix A form of matrix organization in which formal power rests with the functional manager, and the power of the project manager is comparable to that of a project coordinator or project expediter. *CH 3, p. 73*

Weighting system A method used during proposal evaluation in which source selection criteria are assigned numerical values based on their relative importance to the procurement. The buyer's evaluation committee uses the weighted criteria to analyze and compare seller responses, producing a total score for each seller that reflects how well they meet the buyer's priorities. *CH 11, pp. 431, 440*

Welcoming change A key adaptive concept and an expression of the second Agile Manifesto value ('responding to change over following a plan'). Adaptive projects welcome change by design: the product backlog is structured to absorb new priorities at any point, and the product owner re-prioritizes at every iteration boundary. Change is not a disruption to be managed through formal change control; it is feedback to act on. *CH 13, pp. 493-494*

What-if scenario analysis A data analysis technique used to ask "What if a particular factor changed on the project? Would that produce a shorter schedule?" The assumptions for each activity can change, and therefore the activity durations can also change. One example is Monte Carlo analysis. *CH 6, pp. 234, 241, 248*

Wireframes Software-created mock-ups of what a software product will look like. Wireframes are especially helpful because customers who are not IT professionals may find it difficult to picture how a computer program might be laid out. In agile modeling, wireframe sessions are conducted collaboratively with stakeholders to build shared understanding of requirements, reduce rework, and help scope emerge. Each revision cycle closes the gap between what the team assumes and what the customer actually needs. *CH 8, pp. 307, 315-317*

Withdrawal (avoidance) A conflict resolution technique in which the parties retreat or postpone a decision on a problem. Because dealing with problems is a PMI-ism, withdrawal is not usually the best choice for resolving conflict, though there may be situations where it is necessary. *CH 9, p. 339*

Work authorization system A set of approval procedures that facilitates governance in a project where work is complex and executed by diverse sub-teams. It ensures that work is only started when a formal authorization is given, preventing resource conflicts such as two trades being scheduled in the same space at the same time. On predictive projects, the work authorization system is often part of the project management information system (PMIS). *CH 4, pp. 122-123, 145, 150*

Work breakdown structure (WBS) A hierarchical decomposition of the total scope of work into work packages. Required on all predictive projects; enables the project manager to clarify scope, plan cost/schedule/resources, identify risks, and find additional scope. *CH 5, pp. 152, 158*

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Work in progress (WIP) WIP is the number of unfinished pieces of work going on at one time. Excessive WIP hides bottlenecks, represents unrecovered investment, and increases the risk of rework. Agile and hybrid approaches place emphasis on limiting WIP to address these risks. *CH 5, pp. 195-196*

Work package The lowest level of decomposition of work in the WBS. Work is decomposed into work packages which are small enough to be estimable for the purposes of schedule and cost estimation, though the level may also be guided by the control needed for project management. *CH 5, pp. 175, 177, 179-184, 187, 192, 200-201; CH 7, pp. 252, 259, 261-262, 265, 275; CH 6, pp. 213-214, 220, 245; CH 10, pp. 375, 382, 384, 388, 390-395*

Work performance data The initial measurements and details about activities gathered during the Manage Project Execution process in Executing. When monitoring and controlling a project, work performance data is analyzed to make sure it conforms to the project management plan and to determine what the data means for the project as a whole. *CH 3, p. 84*

Work performance information The result of analyzing and assessing work performance data against the project management plan to determine how the project is conforming to the plan and what the data means for the project as a whole. *CH 3, p. 84*

Work performance reports Organized work performance information distributed to the various stakeholders who need to receive and possibly act on the information. Reports may accompany formal change requests or status documents. *CH 3, p. 84*

Workarounds Unplanned responses developed to deal with the occurrence of unanticipated events or problems on a project, or to deal with risks that had been accepted because of the unlikelihood of an occurrence and/or minimal impact. Contingency responses are developed in advance; workarounds are not. Project managers who do not perform risk management spend a lot of their time creating workarounds. *CH 10, pp. 393, 400*

Working capital An organization's current assets minus its current liabilities. In other words, the amount of money the company has available to invest, including investing in projects. *CH 3, p. 80*

Work-in-progress (WIP) limits The core control mechanism in Kanban. A maximum number of items is set for any stage of the workflow. When a column on the Kanban board is full, no new work enters it until something moves forward. WIP limits force the team to finish started work before starting something new, control flow, reduce multitasking and context-switching, and expose bottlenecks the moment they form. Flow is achieved through the balancing of resources and WIP limits. *CH 13, pp. 479, 481-482, 500-501*

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