Project Management Certification Program
Glossary & Diagrams

Glossary:

Adoption: Adoption is typically measured as a success metric to illustrate the acceptance of the project's outcomes. It helps the Project Manager and Stakeholders understand how employee behavior has changed.

Agile- Agile software development is based on an incremental, iterative approach. Instead of in-depth planning at the beginning of the project, agile methodologies are open to changing requirements over time and encourages constant feedback from the end users. The goal of each iteration is to produce a working product.

As Is Process Diagram: This diagram is typically a workflow document that visually depicts the current process steps. The "as-is" identifies where the customer is experiencing pain or where opportunity lies.

Baseline- The defined and approved version of the work used as a measure which all future measurements will be compared. A baseline is a fixed schedule or a point of reference, and can help determine if the project has deviated from the plan. In project management there are three baselines – schedule baseline, cost baseline and scope baseline. Once the work has been baselined, all changes must go through change controls for evaluation and impact to the project. Baselining typically occurs at the end of project planning, and before execution and control.

Benefits: The quantitative or qualitative benefits that can be realized in the successful completion of the project, and are referred to as hard or soft benefits. Hard benefits come from firm commitments to make measureable differences in the amount of revenue generated or savings realized. Soft benefits are intangible, and are harder to translate into dollars. They may include improved employee morale and engagement, increased customer satisfaction, reduced risk, increased alignment with market trends, better regulatory compliance, etc.

Budget- The approved estimate of the entire project's cost. Budget can be broken down further into specific phases or tasks.

Business Requirements Document: The Business Requirements Document (BRD) is a prioritized, consolidated list of individual requirements that represent the business needs and customer expectations. It is used to gain clarity and agreement from customers and stakeholders on what needs will be met and to define project scope and determine a solution.

Canceling a project- A project is considered canceled when the stakeholders or sponsor do not support the project, or do not see the benefit or value of completing the project. A project manager communicates this decision to the project team and anyone impacted by the project. The project formally closes, and does not attend any additional gate sessions.

Change Control- A process where modifications to documents, deliverables or baselines associated with the project are identified, documented, approved, or rejected. The change control process in project management ensures that each change proposed during a project is adequately defined, reviewed and approved before implementation. The change control process helps avoid unnecessary changes that might disrupt services and also ensures the efficient use of resources.

Change Impact Assessment: The Change Impact Assessment helps the project team prepare for change management activities that need to be executed in order for change to be adopted. It includes stakeholder groups impacted by the change, ways they are impacted, and challenges the project team may face with stakeholder groups.

Change Log (also known as Change Register) - A document aggregating the comprehensive list of changes made during the project.

Change Management- A discipline that guides how we prepare and support those impacted by a change in the business to successfully adapt in order to drive organizational success and outcomes. Depending on the size of the project, a Project Manager may be accompanied by a Change Manager to drive change efforts.

Change Request- A request for adjusting the scope, schedule or cost of a project.

Close Phase- The final phase of the project life cycle is close-out when project tasks are completed and the client has approved the outcome, resources are reassigned, the project is handed over and the post-project review is carried out to generate lessons learned for future projects to incorporate.

Communications Management- A component of the project or program that describes how, when, and by whom information will be administered and disseminated.

Communications Plan: The communications plan describes how changes and outcomes will be communicated, to what stakeholder audiences, and in what timeframes. It includes a thoughtful sequence of key messages by stakeholder audience and who sends the messages. This ensures audiences hear the messages from those who have credibility with them. The communications plan should be developed from the stakeholder analysis and change impact assessment, and complimentary to the learning plan.

Cone of Uncertainty- A theory that describes the diminishing uncertainty during a project. As more is known about the project, uncertainty decreases over time.

Control- The process of comparing actual performance with planned performance, analyzing variances, assessing trends, evaluating possible alternatives and recommending appropriate corrective action.

Corrective Action- An intentional activity that realigns performance of the project with the project management plan.

Cost- Refers to the investment required to complete the project. It includes resources, materials and labor rates, and travel related expenses for the project team.

Critical Path- The longest overall duration of activities in your schedule. To find it, you must first know when each task occurs.

Decision- A conclusion or resolution made by the project manager, project team member or stakeholder to resolve a conflict, issue or risk.

Decision Log- A document that lists the comprehensive decisions made during the project.

Defect Management Plan: The Defect Management Plan outlines how failed test cases will be managed, prioritized and mitigated. Testers will categorize the failed tests by priority and severity so the project team knows which defects to resolve first, and then re-test.

Dependencies- The relationship of preceding tasks with future tasks in a project. Sometimes a current task may have several preceding or future tasks depending on it. Dependencies can occur inside and outside the project, and inside and outside the company and they can be upstream or downstream.

DMAIC- An acronym meaning Define, Measure, Analyze, Improve and Control. DMAIC is a data-driven quality strategy used to improve processes and places emphasis on defining a process issue, establishing a performance baseline from meaningful data and identifying root causes before considering possible solutions.

Execute Phase- The phase where the planned work to meet the business objectives is completed.

Exit/Success Criteria: Exit/ Success criteria are the criteria or requirements which must be met to complete and close testing.

Gates- Gates are checkpoints to ensure the previous project phase was executed satisfactorily, the project is worth continuing to the next project phase and the resources needed to proceed are reasonable and available.

Go/No Go Checklist: The Go/No Go Checklist is used at a "go/no go" meeting to support the decision making process on whether or not a project is ready to go live. The checklist includes specific criteria for things like business readiness, support readiness, and system readiness, along with acceptable thresholds for any issues or problems. The checklist helps identify gaps and deficiencies that may need to be addressed before go live and ensures all parties are in agreement to move to a production/operational environment before doing so.

Go/No Go Meeting: The Go/No Go Meeting is a critical milestone where the Project Sponsor and stakeholders come together and make a decision on whether or not the project is ready for deployment. It's often held with a larger group and very close to the planned deployment date, or go live date.

Goal: High level descriptions of what completing the project should achieve.Goals are the "what" of the process. In other words, "what" will the project accomplish? Projects may have more than one goal, but many objectives per goal

Initiate Phase- The start of the project, where a proposal is generated with a description of the problem to be solved and includes the projects objectives and benefits. During this phase, it is determined whether the project will benefit the organization and if the timing is right to move forward with the project. This is also when the project manager is identified.

Interpersonal Skills- Skills that enable the ability to establish and maintain good working relationships with people, including stakeholders, sponsors and the project team.

Issue- A problem that has occurred in the course of the project and needs to be resolved.

Issue Log (also known as Issue Register)-A document in which issues, their analysis, responses and owners are recorded and monitored.

Issue Management- The process of identifying, analyzing, recording, responding and controlling issues and materialized risks. Project Managers leverage issue logs to manage these issues.

Learning Plan: The learning plan identifies which stakeholder audiences require what types of knowledge in order to prepare for change. It helps stakeholders move from current state behaviors, processes, job roles, tools to future state. Several types of learning may be part of the plan: instructor-led training, eLearning, webinars, and small group meetings. The learning plan should be developed from the stakeholder analysis and change impact assessment, and complimentary to the communications plan.

Lessons Learned- The knowledge gained during a project which shows how the projects events could have been addressed or delivered, with a purpose of improving on future projects and performance.

Management Plan- The plan that ensures measures are in place and agreed upon for keeping the project on task. Management plans are particularly important when managing large, complete projects where the work must be tightly managed to stay on track.

Milestones- They are significant events along the timeline, and may include key hand offs, communications, deliverables or gates. Detailed milestones are documented in the plan and schedule, and are typically highlighted in the project charter at the onset on a project.

Monitor and Control Phase- The phase where the projects progress is tracked and reported. The project manager and team determine action needed to keep the project on track by monitoring and mitigating risks and issues. They take corrective action when there is a change to scope, schedule or budget.

Monitor- Collecting project performance data with respect to the project plan, produce metrics and report on performance details.

Objective- Specific, measurable outcomes that contribute to achieving the project's goals.

On hold projects- A project may be put on hold for a variety of reasons- the allocated resources may be needed elsewhere, the scope has potential to change (or continue to change) or the project needs additional funding, just to name a few. When a project is out on hold, the project manager is responsible to communicate this to all project team members and stakeholders, and to document the work completed up to that point. The project manager should also plan to revisit the project with stakeholders and sponsor to plan for next steps as needed.

Plan Phase- The phase where the project manager and project team determine project tasks, milestones, resource assignments duration, and dependences. They identify risks issue and assumptions, and determine the project schedule and budget.

Plan Phase-The phase where the project team comes together to establish the total scope of the work effort, define and refine the objective, and develop the course of action required to attain those objectives. They decide how the projects will be executed, monitored and controlled.

Problem Statement- A clear description of 1) the problem that needs to be solved, 2) who is impacted by the problem, and 3) why it's important to solve. By defining the problems and details the benefits of solving it, you can make a case of investing in the project.

Problem Statement: A problem statement is a clear description of the problem that needs to be solved, who is impacted by the problem, and why it's important to solve.

Proceed with conditions- A project manager may be told to proceed with conditions, meaning the proposed plan or next steps may be subject to additional changes, pending the development of new information.

Program Management- The process of managing several related projects, often with the intention of improving business processes or efficiencies. The main difference between project and programs, is that projects have a defined start and end date, where as a program does not.

Project- A temporary body of work with a defined start and end date aimed to create a unique product, service or result. Projects can be simple, like organizing a birthday party or complex like building a space rocket.

Project Center- The single source for managing all HROA projects, designed to provide global visibility across the HROA portfolio and support project management best practices. Click here to access Project Center.

Project Charter- A document issues by the project initiator or sponsor that formally authorizes the existence of the project and provides the project manager the authority to apply resources and begin carrying out the work.

Project Management- A methodological approach to planning and executing a project within the defined limitations of scope, time and cost, where a project team applies knowledge, skills, tools and techniques to meet a customer's requirements.

Project Manager- The person assigned to the project who ensures the project delivers the business value expected by the customer within a set of limitations.

Project Plan- The approved version used to guide both project execution and project control. The project plan is typically locked before the execute phase, and can only be changed through change controls.

Project Schedule- A listing of a project's milestones, activities, and deliverables, usually with intended start and finish dates.

Project Team- The members of the project management team who perform project management activities outlined in the project plan.

RAID Log: RAID is an acronym meaning Risks, Issues, Assumptions and Dependencies. It is a key deliverable the Project Manager uses to keep the project on track and inform stakeholders of project progress. RAID logs allow the Project Manager to document, update and communicate changes to these 4 key areas.

Resource Managers: The managers of the employees who hold the skills and competencies needed for the project in order to execute it. The number and type of project team members may vary depending on the scope and complexity of the project.

Resources- Refers to the people or team(s) responsible to ensure specific activities and deliverables are completed. Project resources can be employees, vendors or consultants.

Risk- Any potential incidents that could threaten the success of the project. Risks are uncertain events if occurs may have a positive or negative impact on the project.

Risk Log (also known as Risk Register) - A document in which risks, their analysis, responses and owners are recorded and monitored.

Risk Management Plan- The plan for responding to risks during a project that enhance the project's success and reduce threats. Risk response planning technique can include the following: acceptance, avoidance, mitigation, transference.

Risk Management- The process of identifying, analyzing, categorizing (impact and probability), responding and controlling risks during a project. Project Managers leverage risk logs to manage both known and unknown risks as they arise.

Scope – The initial scope is first included in the project charter where its characteristic are very high level. It includes what the project will and will not accomplish at a high level. The detailed scope is written during the planning phase, and describes what is in and what is out of scope in more detail. It includes details like business groups, roles, and geographies that will be impacted. It may also include new investments such as headcount, hardware and software, and any assumptions and constraints. The project scope provides a documented basis for making future project decisions and for developing a common understanding of project scope among the stakeholders.

Scope Creep- The uncontrolled expansion to the original project scope without adjusting time, cost or resources, or without customer approval.

Sequence- A particular order in which the tasks and dependences follow.

Sponsor- A person or group who provides resources and support for the project, and is accountable for enabling its success.

Stakeholder Analysis- A technique used to gather both qualitative and quantitative information from stakeholders to understand their interests [and level of interest] about the project.

Stakeholder Assessment: The Stakeholder Assessment provides a 'snapshot' of who the identified stakeholders are and their associated levels of interest and influence over the change. It provides a framework to assess different stakeholders' attitudes to the change and proposes actions to manage, communicate and engage with each stakeholder. It informs all the other change management documents

Stakeholders- Stakeholders are initially documented in the project charter, and are detailed in the project plan. They may be an individual, group, or organization, who may affect, be affected by, or perceive itself to be affected

by a decision, activity, or outcome of a project. Their interests may be positively or negatively impacted by the execution or completion of the project.

Steering/Operating Committee- An advisory committee usually made up of high level stakeholders and/or experts who provide guidance on key issues such as company policy and objectives, budgetary control, marketing strategy, resource allocation, and decisions involving large expenditures.

Success Metrics: Success metrics are determined at the beginning of the project based on the project objectives. Depending on the project, they measure things like adoption, defects, time, and cost over a set period of time. Each metric will have a baseline and target so that performance before and after the solution launched can be compared against what was expected as a result of the project. The Project Manager reports on the success metric results (or results to date) as a part of project closure.

Task- An activity that needs to be accomplished within a defined period of time, and typically rolls up to a greater milestone. Tasks should be assigned to the resources who will be completing them, and what their dependencies are.

Test Cases: Test cases are a set of conditions that have specific steps for a tester to validate functionality is working as designed, with the quality expected by the customer. Each test case should map back to a requirement in the BRD. This helps to ensure test coverage (every requirement is tested) and highlights any ambiguous requirements or missing functionality. Before test cases can be executed, they are signed off by the Project Sponsor and stakeholders.

Test Plan: The Test Plan is a detailed document that guides testers through the testing phase. It includes the test strategy, objectives, scope, schedule, resources, approvers, defect management plan, entry and exit/success criteria, and test cases. The exercise of developing the test plan helps the test team think through what needs to be done to validate the solution. Additionally, test plans help those outside the test team understand how the solution will be validated.

Timeline- The timeline is a visual representation of the sequence of tasks and milestones that need to occur on the project. It can be displayed as an overview of when each project phase will begin and end, or when each milestone will occur.

To Be Process Diagram: This diagram is typically a workflow document that visually depicts the ideal process steps and highlights changes from current state to future state. It helps stakeholders quickly align on the improvements that will be delivered as a result of the project.

Triple Constraint- A combination of the three most significant constraints in project management- scope, time and cost. It is sometimes referred to as the iron triangle. It demonstrates that if any one constraint changes, the others must also change.

Variance- The difference between what is expected (baseline) and what actually is accomplished. Project managers are often identifying variances during the monitor and control phase.

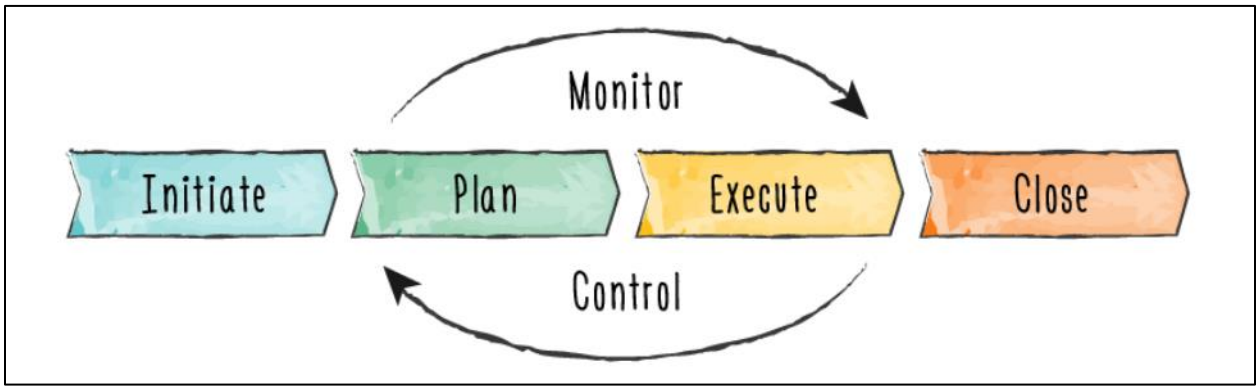
Waterfall- A sequential (non-iterative) design process in which progress is seen as flowing steadily downwards (like a waterfall) through the project management phases.

Work Reports- Reports, statuses or metrics that detail the progress of the project and are typically shared with stakeholders and the project sponsor. Work reports are generally a task completed during the monitor and control phase.

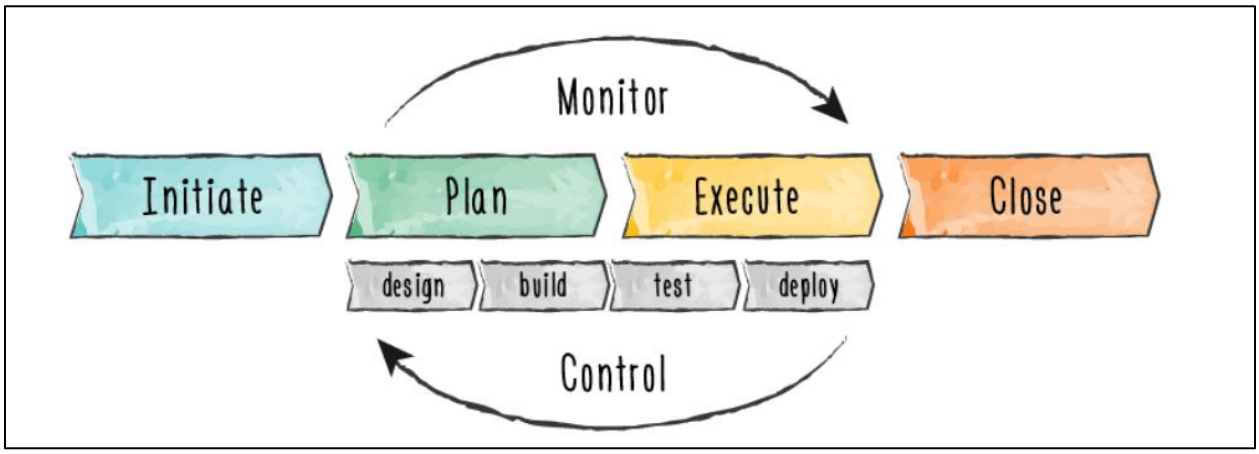
Work Streams- The body of work for a single functional area that is completed with dependencies and from other work streams. For example, technology projects may have a development work stream, a training work stream and

Diagrams:

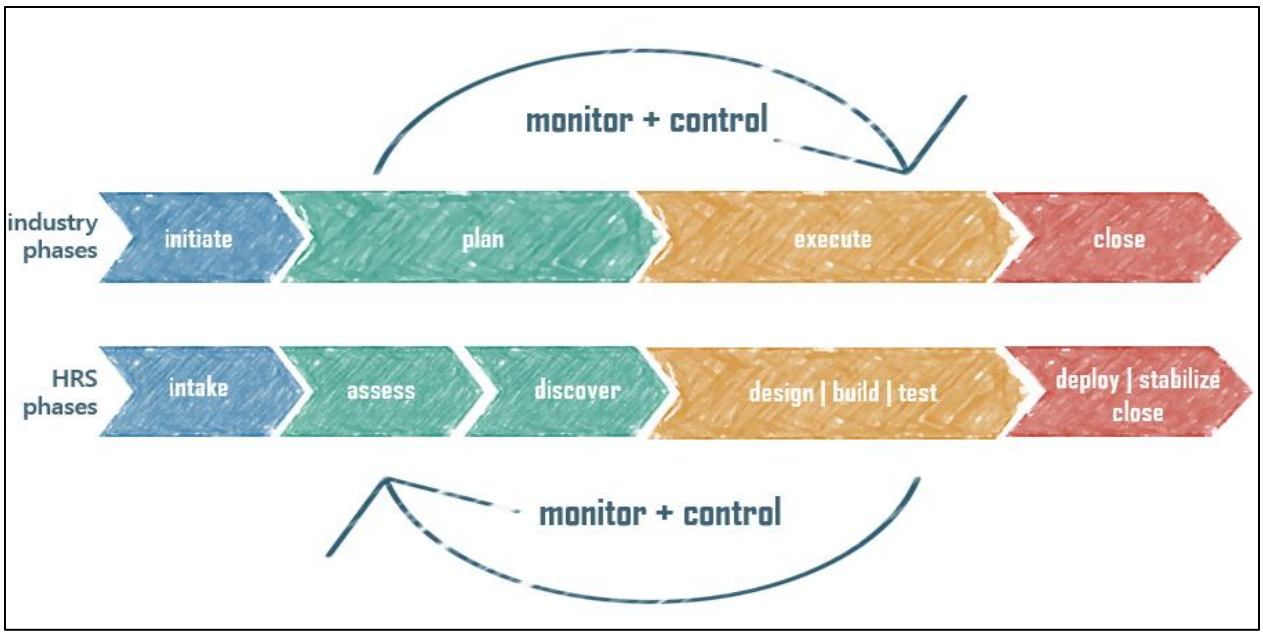
Industry Project Management Life Cycle:



Industry Technology Project Management Life Cycle:



HR Services vs. Industry Project Management Life Cycle



The Triple Constraint: