

THE DEFINITIVE REFERENCE

PROJECT MANAGEMENT • URUK FRAMEWORK

PROJECT MANAGEMENT

Guide and Terminology

GLOSSARY



— 500+ TERMS • ACRONYMS • CONCEPTS —

A Companion Reference for the Entire Strategy to Results Series

URUK PROJECT MANAGEMENT

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Front Matter



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Version Control

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About the Uruk Guides Trilogy

This guide is part of a trilogy of complementary references published by Uruk Project Management. While each guide stands alone and can be used independently, they are designed to work together as a complete ecosystem for building, implementing, and understanding tailored project management methods.

The three guides are:

1. **Guide 1: Value Delivery Methodology – How to Build Tailored Methods** – The strategic blueprint. Explains the methodology principles and the 10-step tailoring model.
2. **Guide 2: Value Delivery Methodology – Stage Deliverables and Gates – Templates** – The tactical toolkit. Provides the copy-paste-ready templates for stage deliverables and gates. You can use as-is or modify to fit your context.
3. **Guide 3: Project Management Guide and Terminology** – The definitive reference. A comprehensive glossary of all project management and Uruk Framework terms, acronyms, and core concepts.

These guides are hosted on the UrukPM website, Knowledge tab, Tools & Templates section: <https://urukpm.com/knowledge/tools-templates/>. Please note that in the Knowledge tab, there are numerous other resources available for you that we are not listing here, although they are relevant to the Value Delivery Methodology. We are maintaining the focus on the three most important guides that support the **Strategy to Results™** series.

Relation to the Strategy to Results Series:

These guides directly supplement **Book 4, Delivering Value**, which details the **Value Delivery Methodology (VDM)™**, and the **In Practice sub-series (Books 5–7)**, which apply these tailored methods to specific project classes and programs. They translate theory from books into actionable, downloadable resources and clear definitions you can immediately apply in your organization or on the **Stratija**¹ platform.

For the recommended reading order and a comparison of the three guides, please see the next section, *“How to Use These Guides.”*

¹ Stratija is a digital solution, a software platform, based on the VDM and the Uruk Framework. In other words, it is a practical and comprehensive solution that allows organizations to seamlessly implement the Uruk Framework to manage their entire portfolio, including its projects and programs.



How to Use These Guides

These three guides are companions to the Uruk Project Management **Strategy to Results** series—specifically supporting Book 4, **Delivering Value** (which details the Value Delivery Methodology) and the In Practice sub-series (Books 5 through 7).

While they are designed to be referenced independently, they form a cohesive ecosystem for building and applying tailored project management methods. Here is how they relate:

Guide	Focus	Best Used For
Guide 1: Value Delivery Methodology – How to Build Tailored Methods	The “Why” and “How” of tailoring. Explains the two core principles, the five significant variables, and the 10-step model for designing your own method.	Understanding the logic behind customization and defining the structure of your project life cycle.
Guide 2: Value Delivery Methodology – Stage Deliverables and Gates – Templates	The “What”. Provides the actual copy-paste-ready templates for stage deliverables (e.g., Project Brief, PDP) and stage gates for all project classes (Micro, SSP, MLP, and Programs).	Building the actual content of your tailored method. Use this when you reach Steps 7 and 8 of the Tailoring Model.
Guide 3: Project Management Guide and Terminology	The “Definitions”. A comprehensive glossary and reference for all Uruk Framework terms, acronyms, and core concepts used across the guides and the Strategy to Results series.	Clarifying ambiguous terms (e.g., Phase vs. Stage, Estimate 1 vs. 2) or cross-referencing industry-standard equivalents

Recommended Reading Path:

Ideally, you should start with the book **Delivering Value**. However, if you have not bought that book, then follow this path.

1. Start with **Guide 1** to define your project classes and life cycle.
2. Use **Guide 2** to populate the stages with the appropriate templates and gates.
3. Keep **Guide 3** open as a reference to ensure consistent terminology across your organization.

We must emphasize that Guide 3 is not limited to the Value Delivery Methodology or the Uruk Framework. It is a terminology guide with hundreds of terms that project management practitioners need and use.

Note: These guides are published under Creative Commons (CC BY-NC-ND 4.0) and are meant to empower you to build your own methods. If you prefer a digital, automated approach, the logic described here is fully embedded in the **Stratija** software that we are currently building. Please check with us or our website for the latest status of Stratija.



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Overview

Introduction and Purpose

We present our readers with a project management guide and glossary of terms. We started this project as a project management dictionary. However, the idea evolved into a project management guide centered around project management terminology. Therefore, these sections include definitions of terms, explanations, examples, and graphics, where possible.

It is essential to note that this is not a complete guide. A comprehensive guide requires hundreds of pages. Therefore, we offer the definitions with basic information as a quick guide. For in-depth learning, we advise you to seek additional resources. Also, Appendix B lists professional associations in project management that publish other guides.

Disclaimer About the Definitions

Many of these definitions align with standard practices and terminology suggested by professional associations and other project management literature. However, in some instances, we offer the author's perspectives and approaches that might deviate from conventional definitions.

Structure of the Guide

We have considered two approaches for the structure of this guide:

1. Alphabetical listing by term.
2. Grouping these topics into related sections.

We adopted the second option because it provides a better learning environment (in book format). In this format, all the terms related to a topic are grouped so you can relate them readily. However, if you prefer an alphabetical listing, please refer to the Index, Appendix C.

We subdivided this guide into sections for the highest-level grouping. There are five sections:

- I. Organizations and Team Structures
- II. Project Management³
- III. Sectors/Domains Specialized Terms
- IV. Uruk Unique Terms

³ In the context of this guide, project management is used as an umbrella term to include the 4PMs and all relevant usage.



V. Strategy to Results series, terms

Each section has parts, each consisting of a few groups of terms. Subsequently, all definitions are at level 4.

Relevant Guidance

We will sequence the terms within a category that makes sense for a better understanding. The following guidance helps you understand the definitions and the color coding that we used.

- When we add examples to a definition or a reference, we use *italics in blue font*.
- For formulas, we use *italics and dark red font*.
- If we have an example that is a case study, we will use *italics and green font*.

Diversity of Practice

In the broadest sense, project management includes many sectors, domains (industries), and project types. Therefore, some of these terms could be applicable or common in one or more domains, but not all of them. Where it makes sense, and there are terms unique to a domain, we will endeavor to segregate them.

We dedicate Section III to these specialized terms.

Keep in Mind

You might find a word or phrase in the definition of a term you are unfamiliar with; we defined it elsewhere in this guide. Therefore, we recommend looking for it. This approach allows us to keep the definitions as concise as possible.

Collaboration

We publish this guide as a PDF under the Creative Commons guidelines and share it openly. Therefore, we are open to your support and contribution. We are primarily interested in the following:

- Correcting any apparent errors, and
- Adding content, such as examples and new definitions.



The Latest Update

Our latest update, this third edition, updates the guide and aligns it with our **Strategy to Results** series, which modified some definitions and added new terms.

Commonly Confused Terms

Some terms in this guide sound similar, or are used loosely as synonyms in everyday practice, but carry distinct meanings in the Uruk Framework. This section flags the most common points of confusion side by side. Each entry here is a pointer to the full definition elsewhere in the guide, not a replacement for it.

Product Scope vs. Project Scope

- Product scope is about the product of the project: what the project will produce when it is done (e.g., a facility, a service, software).
- Project scope is about the work required to deliver the product scope: the methodology and the various stages (e.g., research, writing, editing, and publishing, for a book project).
- *In short: product scope is the “what,” project scope is the “how.”*

Quality vs. Grade

- Quality is about compliance with a standard or specification. It is binary: a project or component either complies, or it does not.
- Grade is a category or rank given to products or services with the same functional use but different technical characteristics (e.g., features, materials).
- Common error: calling something “high quality” or “low quality” when what’s actually meant is high grade or low grade. A low-grade product can still be of high quality (it fully meets its own specification); a high-grade product can still be low quality (it fails to meet its specification).

Stakeholder vs. Shareholder

- A stakeholder is a person or group interested in an enterprise or project; they can affect or be affected by it, with direct or passive influence.
- A shareholder (or stockholder) is specifically an individual, company, or institution that owns shares in a company's stock, i.e., someone with a financial stake.
- Every shareholder is a stakeholder of the organization, but most stakeholders are not shareholders.



PMU vs. PMF

- The Project Management Function (PMF) is the organizational capability for project management: the principles, governance, systems, processes, and competencies that enable disciplined delivery. It is not a department; it is the function the organization must possess.
- The Project Management Unit (PMU) is the organizational structure (division, department, or business unit) that oversees the PMF. It is the formal home of project management, led by a CPO or equivalent.
- In short: the PMF is the capability; the PMU is the organizational structure that houses and delivers it.

PMU vs. PMO

- The PMO (Project Management Office) is a legacy administrative construct, typically focused on reporting, templates, and compliance, often without the authority or permanence of a formally established function.
- The PMU (Project Management Unit) is a formal, permanent organizational unit with defined authority, responsibilities, and leadership, the institutionalization of project management as a core function.
- The PMU is not simply a renamed PMO. “Unit” signals organizational permanence and authority; “office” often signals administrative support. In the Uruk Framework, the PMO is neither the PMU nor the PMF.

Captured Lessons vs. Lessons Learned

- A captured lesson is when the project team identifies and documents a lesson (good or bad), typically added to a database if the organization has that practice.
- A lesson learned, in Uruk usage, is a captured lesson that has been reviewed, validated, and actually applied to a future project. This differs from the widespread industry use of “lessons learned” to simply mean a documented lesson.
- In short: capturing is documenting; learning requires application. A database full of captured lessons that are never applied is documentation, not organizational memory.

Rebaseline vs. Moving Baseline

- A moving baseline (the Four Control Reference Points™) is a planned, progressive refinement of the baseline as the project advances through its stages and the organization’s knowledge deepens; not an arbitrary change.
- A rebaseline is an arbitrary change to a formal baseline, often made because of poor performance and without a corresponding change in scope.



- The distinction matters: rebaselining to mask underperformance is not a management tool; it is an admission that the project was never in control.

Project Completion vs. Project Closure

- PLC Closure (Stage) is the final stage of the project or program life cycle. It closes the governance and stewardship of the investment, capturing lessons learned and preparing for long-term value validation. It happens relatively soon after delivery.
- Project Closeout is the broader, later umbrella term for the project's final accountability, consisting of the *Project Completion Report* (produced at PLC Closure) and the *Final Assessment Report* (produced after sustained operations, validating the value case).
- In short: PLC Closure happens first and closes governance of the delivery effort; Project Closeout is the complete accountability story, finished only once the *Final Assessment Report* confirms whether the value was actually realized.

OPMM vs. PMM

- Organizational Project Management Maturity (OPMM) and Project Management Maturity (PMM) are used interchangeably in the Uruk Framework; both refer to the level of development of the organization's project management practices, typically scored on a 1-to-5 scale. We will use OPMM.

Big Bang Development (BBD) vs. Sequential Development (SD)

- Sequential Development (SD) is the current term for a product development approach where the entire product is delivered as one release at the end of implementation.
- Big Bang Development (BBD) was the term used for this same approach in earlier Uruk material.
- BBD is retired, and the only reason we often mention it is to include a reference for those who might be familiar with our earlier work.

Final Assessment Report (FAR) vs. Project Termination Report (PTR)

- The *Final Assessment Report* (FAR) is produced when a project reaches full closure; it assesses Dimensions 3 and 4 of project success (Product Delivery Success and Objectives Success) after sustained operations.
- The *Project Termination Report* (PTR) is produced when a project is terminated or abandoned before reaching full closure; it documents the reasons for termination, lessons learned, and governance recommendations, without a value assessment.
- Both are components that can feed into the *Project Closeout Report* (PCOR), but they apply to opposite outcomes: FAR is about successful completion, PTR is about termination.



Megaproject vs. Giga Project

- A Megaproject is a project of extraordinary scale, typically costing more than one billion dollars, characterized by high complexity, long duration, and significant risk dynamics.
- A Giga Project is a project or program of extreme scale, typically costing more than ten billion dollars, often structured as a program of multiple interrelated Megaprojects.
- Every Giga Project is effectively built from Megaproject-scale components, but not every Megaproject is part of a Giga Project.



Sec I. Organizations and Team Structures

A. Organizational Types

This part includes information about types of organizations and their relevant terms. Some are limited to the project management field, while others are general.

1. General

Organization

- Organization refers to any entity, such as an *NGO*, *NPO*, government agency, startup, or business.
- We prefer this term to business or company when we need to be generic.
- Further, an *organization* could have many *organizational units*.
- Therefore, in writing and discussions, the context must be transparent to determine if the reference is to the entire organization or a specific unit.

Non-Governmental Organization (NGO)

- A non-governmental organization (NGO) is a non-business entity.
- A non-governmental organization (NGO) is an organization that typically operates independently of any government, with the primary objective of improving social conditions.
- However, some governments might launch or support NGOs in different countries.
- NGOs are typically non-profit institutions and are sometimes referred to as civil society organizations.
- NGOs can be established at a local community, regional, national, or international level and serve various social or political goals.

Non-Profit Organization (NPO)

- A non-profit organization (NPO) is a non-business entity.
- It is a legal organization that operates for the collective, public, or social benefit rather than aiming to generate profits for its owners.
- These organizations can generate revenue and profit. However, the profit stays within the organization as an emergency fund or to fund various activities that fit within the NPO mandate.
- These could be charities, professional and trade associations, etc.



Startup Development Organization (SDO)

- A startup development organization is often a company that focuses on supporting startups.
- These include startup studios, incubators, and accelerators, among others.
- A government agency could also support an SDO.
- An SDO might also be linked to a university.
- For example, the Small Business Administration (SBA) supports startups in the United States. Other countries might have something similar.

Semi-Government Entity

- A semi-government entity refers to a wholly or partially owned business by a government entity.
- Therefore, these entities operate like businesses, semi-independent of the government.

2. Project Management

Project Management Consultancy (PMC)

- A project management consultancy could mean more than one thing based on the context.
- There are two standard definitions of this term.
- One definition is for a company offering consultancy engagements or services related to project management, such as advisory services, methodology implementation, etc. Typically, short-term engagements.
- Another definition, especially when using the PMC acronym, refers to a service provider specializing in managing large projects and programs on behalf of a client. These projects could cost millions or a few billion dollars. Further, alternative terms for this type would be program manager or program management consultancy.

Project Owner

- A project owner could be a person.
- However, this term often refers to the organization (or one of its units) that launches the project, pays for it, owns it, and realizes the benefits generated.
- It is an abridged version of a project owner organization.

Project Owner Organization

- See Project Owner



Service Provider

- A service provider is any organization providing services to a client.
- Alternative terms would be consultants, contractors, and vendors.

Sellers

- Seller is a term used in procurement to define the party selling a service or a product.

Buyers

- Buyer is a term used in procurement to define the party buying a service or a product.
- A service provider is a seller to a project owner, but could also be a buyer of goods or services from other providers.

3. Project Management Associations

Please refer to Appendix B.

B. Team Structures

This group is for different project or program team structure models. There are three major types: functional, matrix, and projectized. Further, the matrix type is subdivided into three subtypes.

Functional Organization

- In a functional organization, the project team members come from within the organizational units (functions), and no one is assigned to lead the work.
- Leading the team is often loosely left to a functional manager.
- This type of structure is suitable for basic projects where most of the work is within an organizational unit.
- It is not ideal for projects with multiple units and many resources.
- It is like operational activities, but is labeled as a project for some formality and due to the temporary nature of the work.

Matrix Organization

- A matrix organization is where the project team members come from different organizational units.



- Team members report to a project manager, team leader, or coordinator who could also come from one of these units.
- Various project management references suggest different sub-categories for matrix organizations, including weak, balanced, and strong matrices.
- This structure results in team members having a dual reporting challenge since they must report to their functional managers and the project manager.
- Figure 1 illustrates the different matrix organization types.

Weak Matrix

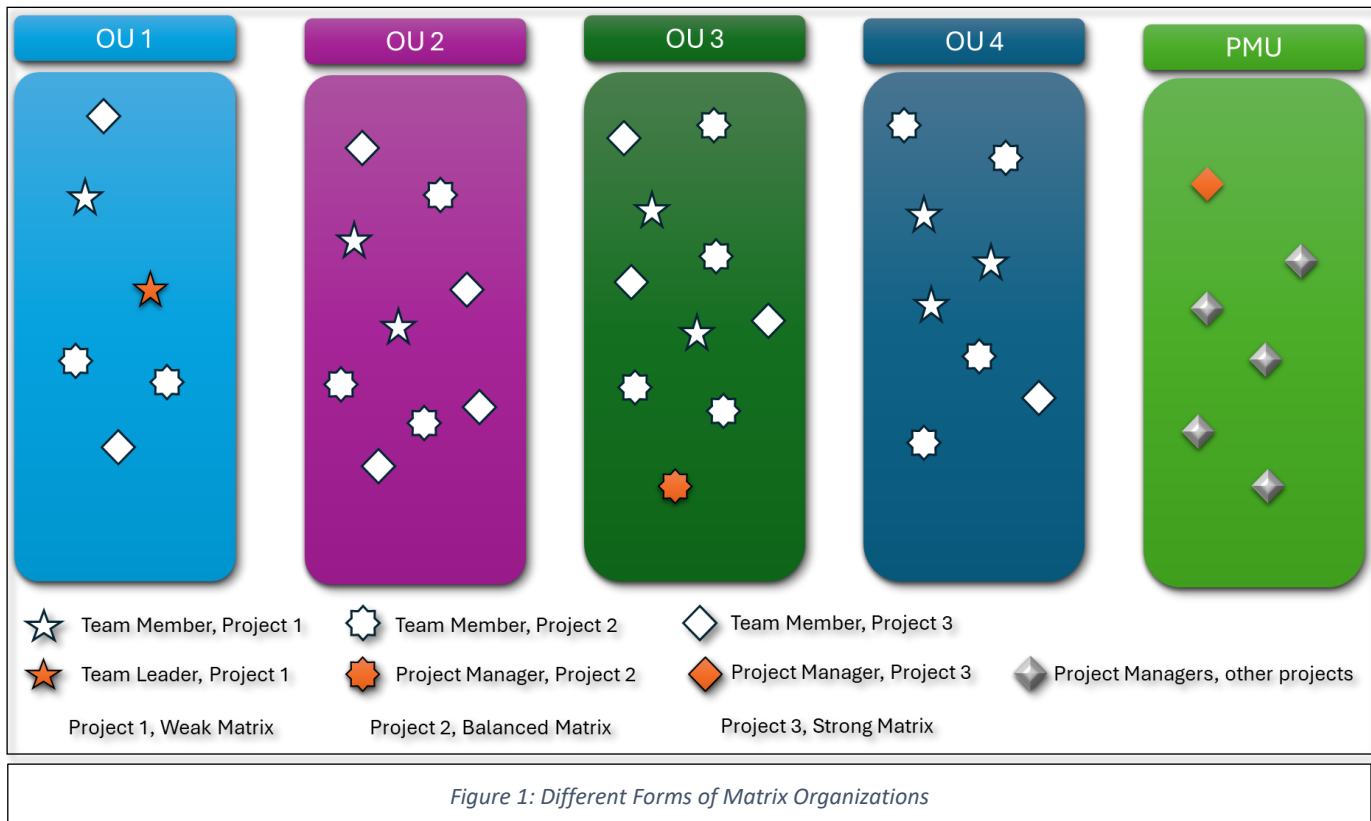
- See matrix organization first.
- A weak matrix is where the project manager's authority is relatively weak compared to a functional manager's.
- It is also likely that a project manager might not exist in this form of organization. Instead, there could be a project coordinator, team leader, or other title.
- The person in charge of the project is likely a member of the organizational unit leading the project.
- Refer to Project 1 in Figure 1.

Balanced Matrix

- See matrix organization first.
- A balanced matrix would allow the project manager somewhat equal authority to a functional manager, although this is not an exact science.
- The person in charge of the project is likely a member of one of the organizational units involved.
- Since the person might not have been trained as a project manager, we often refer to this role as an accidental project manager.
- However, the person leading the work might have a title other than a project manager.
- Refer to Project 2 in Figure 1.

Strong Matrix

- See matrix organization first.
- A strong matrix is where the project manager's authority is more substantial than that of functional managers.
- In these organizations, the project manager likely comes from a project management division or office (PMU in Figure 1). In other words, the project manager's primary job is project management.
- Therefore, this person might be trained as a project manager and currently only manages projects, i.e., no other role.
- Refer to Project 3 in Figure 1.



Projectized Organization

- A projectized organization is one in which team members are assigned to a project, often full-time.
- They could be transferred from various organizational units for the project's duration.
- They could also be hired as dedicated team members for the project and be let go at completion if they are no longer needed.
- As a result, they only report to the project manager instead of dual reporting to a project manager and a functional manager.
- In this context, it is most likely that the project managers are professionals, meaning their job is only to manage projects and they do not have another functional or technical role in the organization.

Integrated Team

- The term integrated team could be used in two contexts.
- The first context is internal within an organization where the team members come from different organizational units. However, this is more or less similar to a matrix organization.



- The second context, which is common in some capital projects, is where the project team might have members from more than one organization, such as from the owner and provider organizations.

C. Project Management Roles

Project management involves many roles. We cover this topic in Section II, Part E, Sub-Part 12, People Aspects.

Sec II. Project Management

A. Introduction

Two perspectives describe project management.

- The standard perspective concerns the processes and methods to manage a single project.
- However, in a broader sense, it refers to the bigger picture of managing projects, which we call **organizational** project management.

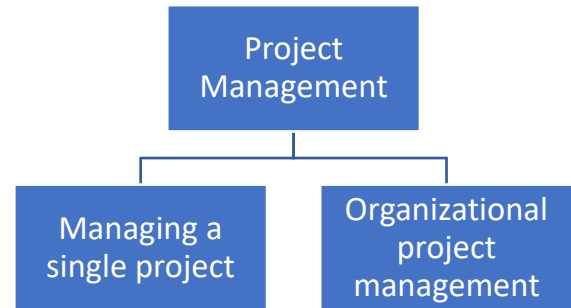


Figure 2: Two Project Management Perspectives

Our definitions in this section include the above and related topics, such as stage management, product development, and project management methodology. Since this is a massive section, we subdivide it into many parts.

In this substantial section, we have the following parts:

- Organizational Project Management
- The 4PMs
- Project Management Methodologies
- Project Management Actions
- Miscellaneous Terms

B. Organizational Project Management

Organizational Project Management (OPM)

- Organizational project management presents a broader view of project management, focusing on the organization instead of single projects.
- We include the word “organizational” to emphasize the organizational focus, instead of single projects. Some might prefer to exclude “organizational” from the phrase. Therefore, the reader must determine the context.
- OPM might refer to the framework, which we can also convert into a system. For example, we might say OPM Framework or OPM System. Alternatively, we can use the PM Framework or the PM System.
- This term encompasses organizational project management maturity, governance, and PMO, among many other things.

- Further, OPM also includes the 4PMs: project, program, product, and portfolio management.
- *Figure 3 presents some topics we consider part of organizational project management.*

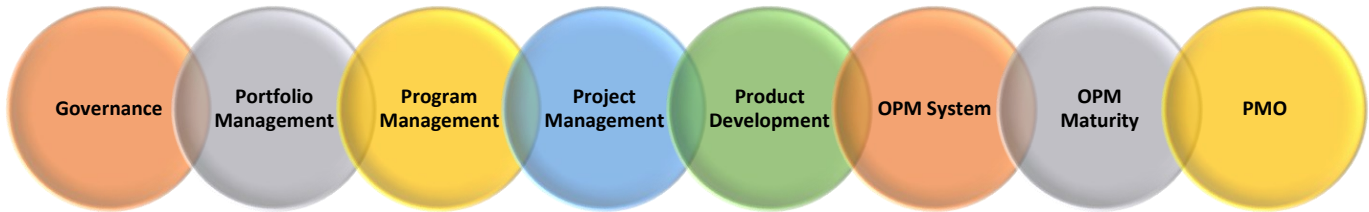


Figure 3: Organizational Project Management: Relevant Terms and Components

Governance

- Governance is the rules, procedures, and policies determining how projects, programs, and portfolios are managed and overseen.
- As part of the oversight process, governance also determines the metrics by which project success is measured.
- When discussing governance, we need to understand the context, such as organizational governance versus portfolio or project governance.

Steering Committee

- A steering committee is a form of organizational governance.
- It often comprises a group of senior managers responsible for project business issues.
- This committee could have budget approval authority and make decisions about changes.
- A project sponsor might be part of or report to the steering committee.
- It is essential to stress that organizations might have different rules on their steering committees, if they have them.

Project Board

- See steering committee

Organizational Project Management System (OPMS)

- An organizational project management system is a reference for project management systems.
- It is about standardization and consistency, which could be very strict or loose.
- The word system does not mean technology; it refers to policies, procedures, methodologies, guidelines, and frameworks, which may include or exclude technology.
- An alternative term is the project management system.

Project Management System (PMS)

- See organizational project management system.

Organizational Project Management Maturity (OPMM)

- Organizational project management maturity is often linked to a scale and scoring model to define the level of development of the organizational project management system.
- An alternative term is project management maturity.
- It is not limited to the system's existence but also the degree of compliance and performance.
- It is noted that organizations with a higher level of maturity achieve higher performance.
- There is no unified maturity model, but many use a model with five levels, from 1 to 5. Others might include level 0 as a starting point.
- Since the OPM System has many processes, it is possible that within the same organization, some of the processes could be at level 3 maturity or higher, while others are at lower levels.
- Figure 4 is the Uruk Framework perspective.

	Level 1	Level 2	Level 3	Level 4	Level 5
PM awareness →	Limited awareness	Some awareness	Good awareness	High awareness	Center of excellence
Formal PM function →	Does not exist	Basic	A PMO might exist	Possibly formal structure	Formal structure
OPM processes & methods →	Does not exist	Some processes might exist	Processes established	Processes exist, continuous improvement	Processes in excellent shape

Figure 4: The Uruk Perspective on Different Levels of Organizational Project Management Maturity

Project Management Maturity (PMM)

- See organizational project management maturity.

Project Management Information System (PMIS)

- The project management information system is typically a centralized software solution.
- It could include the historical records and project archives.
- It should include the project information in an organized way for ready reference and analysis.

Project Management Office (PMO)

- A project management office is an organizational unit dedicated to project management.
- It could also refer to a program management office, a portfolio management office, and many other terms.
- A PMO's role, mandate, and staffing could vary greatly depending on needs, organizational culture, and policies.
- A PMO could be operational, at the department level, or strategic, at the corporate level. Further, some organizations may have multiple PMOs.
- If an organization has many PMOs at different levels, we advise connecting the PMOs somehow.
- Some practitioners refer to a project or program management team as a temporary PMO; we do not subscribe to this terminology. We prefer to use a project or program management team to avoid confusion.
- PMI® guides define a PMO as supportive, directive, or controlling. We have a different view and prefer to see the PMO on a continuum; [Figure 5 provides an example](#).
- Finally, we advocate elevating the PMO to a project management department or division equal to the other organizational functions⁴.

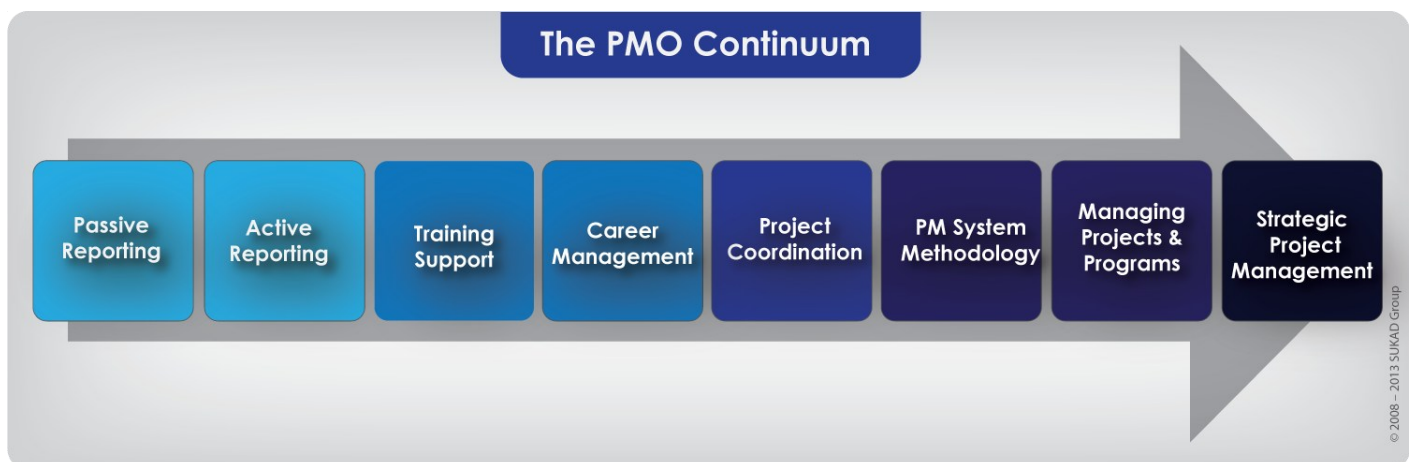


Figure 5: An Example of the Uruk Framework PMO Continuum

⁴ This is the primary focus of a 2025 book by Mounir A. Ajam titled **Vision Realized!** (Revised in 2026).



Project Management Division (PMD)

- See PMU

Project Management Unit (PMU)

- A project management unit is a formal organizational unit within an organization responsible for the project management function.
- Alternatively, in smaller organizations, it could be a project management department, and in larger organizations, it would be a division or a business unit⁵.
- A PMU would be more than an advanced form of a PMO.

Table 1 includes a rough comparison between different types of PMOs and the Project Management Unit.

Table 1: Comparing Different PMOs to the Project Management Unit⁶

Work/Scope	Supportive	Division ⁷	Corporate	PMU
Project Reports	Yes	Yes	Maybe	Yes
Program Reports	Yes	Yes	Maybe	Yes
Portfolio Reports	Maybe	Yes	Yes	Yes
Governance	No	Maybe	Maybe	Yes
Career Management	Maybe	Maybe	Yes	Yes
Professional Development	Maybe	Maybe	Yes	Yes
OPM System	No	No	Yes	Yes
Project Management Methods	No	No	Yes	Yes
Project Selection	No	No	Yes	Yes
Project Delivery	No	Yes	No	Yes
Change Management	No	Maybe	Maybe	Yes
Experts/Consultative Support	Maybe	Yes	No	Yes
Support Strategy Formulation	No	No	Yes	Yes
Centralized Resource Management	No	No	Maybe	Yes

⁵ A Mounir Ajam book, ***Successful Transformation***, presents a simulation for building the project management function and unit.

⁶ This table is extracted from the ***Successful Transformation*** book.

⁷ Depending on the organizational setup, anything in this column would be limited to one division, department, or business line.



Project Management Function (PMF)

- A project management function refers to project management as a core organizational function, like human resources, information technology, or finance.
- It is typically organized around a centralized project management unit (PMU) and led by a Chief Project Officer (CPO).

Business-Integrated Project Management (BIPM)

- Business-integrated project management is a term that represents a different perspective on project management.
- We use it to emphasize the need to stress that project management must be an integral part of organizations, and that we cannot manage projects without tight integration with other functions.

3PM (P3M)

- 3PM and P3M could be used interchangeably in the project management community to mean project, program, and portfolio management.

4PM

- 4PM refers to project, program, product, and portfolio management.
- 4PM includes the product aspect, which is not included in the 3PM.
- We prefer 4PM over 3PM since we view project and program objectives as delivering the product(s).
- We also use this term as the name and theme of the UrukPM Podcast, The 4PM Podcast.

C. The 4PMs

Technically, this is part of OPM, but we separate it for emphasis.

1. Portfolio Management (PM⁸)

Portfolio

- Portfolio refers to all the projects and programs in the organization.
- Organizational units would have their portfolios. However, these are sub-portfolios of the parent organization's portfolio.

⁸ Unfortunately, many terms have the same abbreviations. Therefore, do not use an abbreviation without spelling out the full term first.



Sub-Portfolio

- Sub-portfolio refers to all the projects and programs within an organizational unit.

Portfolio Management

- Portfolio management is coordinating the entire portfolio and its projects and programs.
- The work often includes supporting the strategy formulation.
- It also includes converting the formulated strategy into initiatives, programs, and projects.
- The coordination includes executive dashboards, reporting, portfolio planning, analysis, reviews, and other actions.

Integrated Portfolio Management (IPM)

- Integrated portfolio management is a term in Uruk referring to integrating the 4PMs.
- In this context, it includes the 4PMs, methodologies, and project management actions.
- However, this term does not have to be unique to Uruk since it is about managing an organization's entire portfolio in an integrated way.
- Another way of thinking about this is that project management must be embedded in the organization as a strategic imperative and coordinated across the organization, horizontally and vertically.

2. Program Management (PM)

Program

- The program is a group of related projects and associated non-project work.
- Some practitioners/references view a program as a “bigger” project, which could be true in some contexts.
- Although we believe that projects and programs are relatively similar, some distinctions lead us to separate them.
- Some programs might be operational, where an organization has ongoing initiative-based programs that might repeat annually.

Sub-Program

- A sub-program is still a program.
- However, we use the term sub-program to emphasize that it is a subset of an extensive or strategic program.

Program Management

- Program management is the coordinated management of a program and its projects.
- Program management is like project management, except a program typically includes a few projects.

Program Life Cycle (PLC)

- The program life cycle is the 'span of time' for a program, from idea to closure.

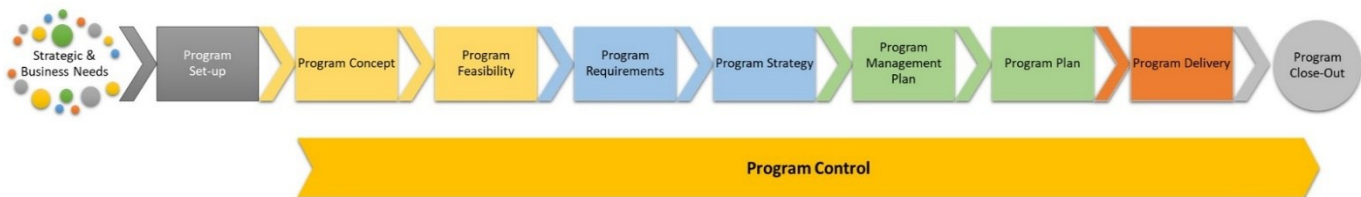


Figure 6: The Value Delivery Methodology, Program Life Cycle

- Like the project life cycle, it would have phases and stages, stage deliverables, and stage gates.
- The Uruk Framework model is presented in Figure 6.

Program Management Team (PMT)

- Defined in Section II, Part E, Sub-Part 12, People Aspects

Program Team (PT)

- Defined in Section II, Part E, Sub-Part 12, People Aspects

Project-Based Program

- It is a program.
- It consists primarily of projects and some tasks unrelated to a project.
- Example: Building Stratija is managed as a strategic program with many projects, where each project is to deliver working software (often new modules).

Initiative-Based Program

- An initiative-based program is an ongoing program that might be funded annually.
- Most of these programs would be related to the given initiatives that might repeat from year to year.



- They could include some projects or significant areas of work.
- An alternative term might be an operations-based program.
- Example: The Corporate Social Responsibility program by an organization.

Blended Program

- A blended program is a program that could have projects and initiatives.

3. Project Management (PM)

Project

- A project is a change initiative to create something from scratch or a significant change to something existing.
- It has clearly defined objectives.
- It follows a 'project life cycle' covering the project from ideation to operations.
- We realize that some practitioners might use the term project to refer to a stage or piece of a project. However, the vital differentiator for us is that a project is end-to-end.

Project Management

- Project management is the coordinated management of a project.
- It includes managing a project across the entire life cycle and managing the relevant actions, such as scope, cost, risk, and change.

PLC Management

- PLC management is a term in Stratija for managing a project across the stages (the life cycle).
- We also use it in program management, which refers to managing a program across its stages.
- However, this term does not have to be limited to Stratija.

Project Management Team (PMT)

- Defined in Section II, Part E, Sub-Part 12, People Aspects

Project Team (PT)

- Defined in Section II, Part E, Sub-Part 12, People Aspects



Project Life Cycle (PLC)

- The project life cycle is a project's "span of time" from beginning to end⁹.
- The PLC consists of phases or stages; in the Uruk Framework, we use both terms.
- The Uruk Framework Value Delivery Methodology subdivides the PLC into three phases.
- The number of stages will vary based on the specific tailored method.
- At the highest level, it is typical to think of the PLC in two parts: (a) the front end, from beginning to final approval¹⁰ and (b) the delivery, including implementation and handover¹¹.

Five Levels of Project Management Mandate™

- The five levels of project management mandate is a concept where Uruk explains the diversity of practice and the five levels.
- The proper level to use depends on the party leading the work, the type of project, organizational preferences, and other variables.
- The levels, from 1 to 5, respectively, are: task management, stage management, technical project management, product delivery management, and value delivery management.
- We list these levels here, but for more information, please refer to this video: https://youtu.be/MQc_w5SZF7o.
- Please refer to Figure 7 for an illustration.

Task Management (Level 1)

- Task management is where the project management practice is limited to managing project tasks.
- Often, teams that follow this practice do not follow a project life cycle methodological process.
- This practice might be suitable for straightforward projects (tiny/micro), where the work could be accomplished in days or weeks.
- The team can use basic tools, like a Kanban board or a spreadsheet.

⁹ These points (beginning and end) might vary depending on the organizational preference or guides used.

¹⁰ Per the Uruk Framework methodology, this work consists of the Discovery and Development Phases.

¹¹ Per the Uruk Framework methodology, this is the Delivery Phase.

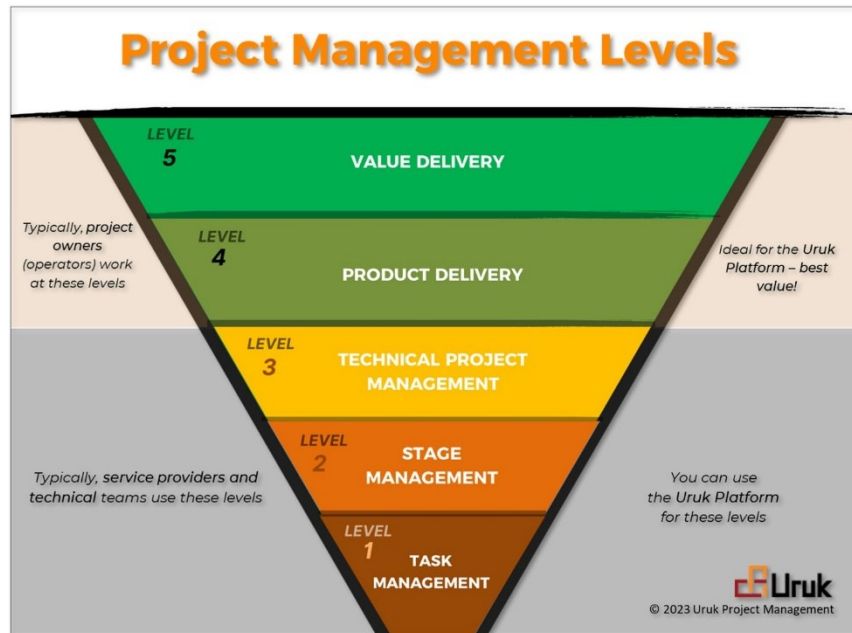


Figure 7: Uruk Framework: The Five Levels of Project Management Mandate

Stage Management (Level 2)

- Stage management is where the project management practice is limited to managing a stage of a project.
- Teams that follow this practice might often use PMI® or ISO process groups.
- This level is common among service providers.
- It is also possible that organizational units (like information technology) might also use this practice.
- Although the work is to manage a stage, practitioners still call it project management.
- Examples: A software development unit building an app for an internal customer. In this case, the project is only the implementation stage of the business project (limited to the product development work). Another example is the engineering or construction stages of a facility project.

Technical Project Management (TPM) (Level 3)

- We use technical project management to refer to the conventional thinking that a project starts with a charter and ends with an output (product, service, etc.).
- In other words, this is only a piece of the project and is a subset of the Uruk definition.
- In this case, project management covers multiple stages but is limited to the boundaries defined (charter to output).



Product Delivery Management (Level 4)

- Product delivery management is broader than technical project management since it typically includes the discovery work pre-project charter.
- However, the emphasis is on delivering the product. Some might call this a product-driven method.

Value Delivery Management (Level 5)

- Defined in Part D in this section.

4. Product Management (PM)

Product

- A product (in the project management context) is a project's final output or deliverable.
- For example, a water bottling **factory** is the product of a project to establish the factory.
- The water bottles produced by the factory would be the factory's product, not the project.
- A product has a product life cycle with phases.
- Products could be software, hardware, gadgets, phones, cars, etc.

Product Management (PM)

- Product management refers to managing a product across the entire product life cycle.
- This would include design, development, maintenance, enhancements, etc.

Product Delivery

- Product delivery is a term we use to refer to a project where the objective is to deliver the project's product.
- An example is a water bottling plant that is the product of a project.
- Therefore, product delivery methodology focuses on delivering the product.
- This is project management level 4, per this video: https://youtu.be/MQc_w5SZF7o.
- The product delivery project would be somewhat equivalent to the acquisition phase of a product life cycle.

Product Life Cycle (PLC)

- The product life cycle typically consists of a few phases (four or five) covering the product from product vision until dissolution or end-of-life.
- That life cycle, also known as useful life, varies depending on the product. For example, a building might have 20 or 25 years of life, whereas computers might have 3 years.



- In this context, end-of-life is when the owner removes a product from the market.
- The names of the phases in the product life cycle also vary, but the following are typical: acquisition, growth, maturity, decline, and withdrawal. Some references on this subject do not include withdrawal.

Product Breakdown Structure (PBS)

- A product breakdown structure, or PBS, looks like a WBS.
- However, PBS presents the hierarchy of the product.
- In other words, it visualizes the final product (output) and its various components.
- We prefer the WBS for stage planning when working on large projects since it relates to project work. On the other hand, PBS focuses on the final output, the project's product.
- Therefore, we use PBS as a tool/technique when the team needs to define the project requirements and explore stakeholders' expectations.
- One final comment: WBS is project (and stage) work that should lead to achieving the PBS.
- For example, a PBS for a house could include indoors and outdoors at the highest level, then subdivide each into more levels and details.

Proof of Concept (POC)

- Proof of concept (POC) is a crucial step in product development.
- It demonstrates the feasibility and viability of an idea or project before committing significant time and resources.
- A POC is the process of gathering evidence to support the feasibility of a project.
- Project managers perform a POC in the early stages to assess whether an idea can be successfully executed.
- It helps demonstrate project viability to product teams, clients, and stakeholders.

Minimum Viable Product (MVP)

- A minimum viable product (MVP) concept from Lean Startup emphasizes learning during new product development.
- An MVP is the most pared-down product version that can still be released.
- It includes just enough features to be usable by early customers.
- The goal is to gather feedback for future product development.

SaaS Product

- A SaaS product refers to software products available in the market through a subscription and where the software is hosted "in the cloud."



- It stands for Software as a Service.

Software as a Service (SaaS)

- SaaS refers to software products; see SaaS Product.

5. Stage Management

Stage management is a concept shared between project and program management. It involves managing a given stage of a project or program. Many practitioners use the terms phase and stage interchangeably. In Uruk, we prefer to separate them.

Phase

- In the Uruk Framework Value Delivery Methodology (VDM), we divide the project life cycle into three phases, which we view as fixed, regardless of project context.
- These phases are discovery, development, and delivery.
- Each phase consists of one or more stages.
- Because the phases are fixed, the stages may vary, and we focus our discussion on stage management.

Stage

- The VDM standard model has nine stages.
- However, the number of stages will vary depending on the tailored method.
- The Uruk built-in tailored methods range from four to eleven stages.

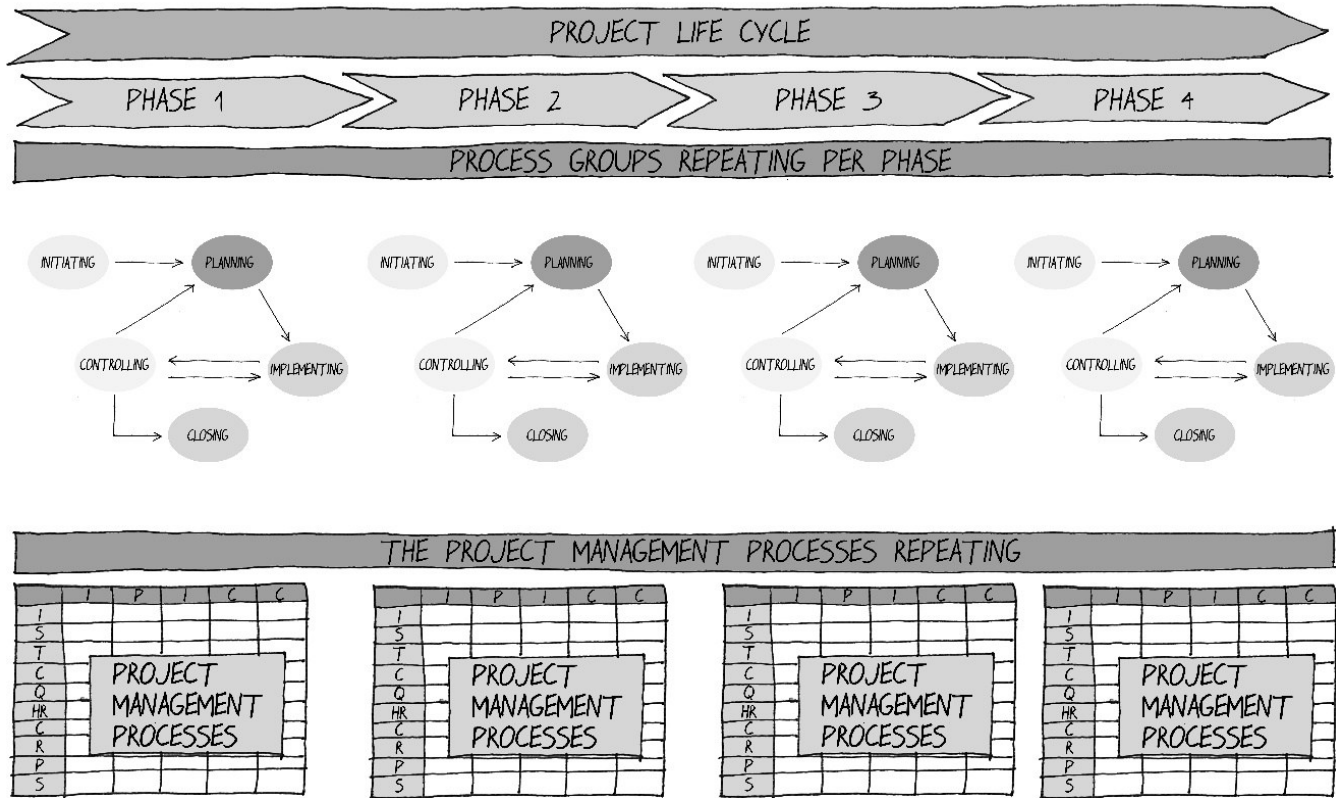
Process Groups

- Process groups are a term PMI®, and ISO uses. PMI recently changed the name to Focus Areas.
- It refers to the five process groups in their guides¹².
- Each of these process groups has one or more processes.
- The idea is that these process groups repeat in every project stage.
- Despite common misconceptions, the process groups ARE NOT project phases or stages.
- Refer to Figure 8 for an illustration.

Stage Management Processes

- Stage management processes are terms that might be specific to Uruk.

¹² The Project Management Institute® Guide to the Project Management Body of Knowledge, and ISO 21500:2012.



© 2017 Mounir A. Ajam | Mapping the process groups to a generic project life cycle

Figure 8: The Repetition of the Processes Group Per Phase (or Stage)

- They are like process groups.
- The Uruk Framework offers six processes.
- Each process consists of a few process steps.
- Refer to Figure 9.

Stage Management Process

- A stage management process is one of the six stage management processes.
- These are: authorize, plan management, plan details, implement, control, and close the stage¹³.

Process Step

- A process step is one of many steps in a stage management process.
- It would be equivalent to a process in PMI®/ISO language.
- Please refer to Part D, VDM Related Terms, for the processes and steps.

¹³ For more details, refer to our books **Project Management Beyond Waterfall and Agile** or **Delivering Value**.

Simplified Stage Management

- The simplified stage management module is related to Stratija.
- It is straightforward and suitable for small stages with limited effort.
- It consists of four (simplified) stage management processes.
- These are for planning the stage work, implementing the stage work, controlling the stage work, and closing the stage.
- Each of the above processes has a few process steps.

Advanced Stage Management

- The advanced stage management module is also related to Stratija.
- It is substantial and is suitable for significant stages that require a great deal of work.

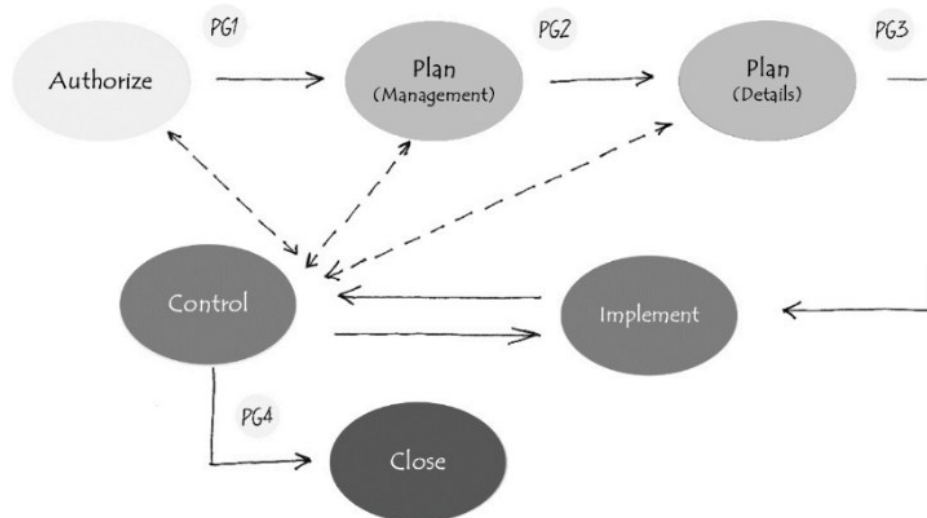


Figure 9: The Uruk Framework: Advanced Stage Management Processes

- It includes all six stage management processes and their process steps.
- For the advanced stage management processes and their steps, please refer to Part D, VDM Related Terms.
- Refer to Figure 9 for an overview of the advanced stage management processes.

Stage Deliverable

- Generally, each stage in a project life cycle has one primary stage deliverable, although it is possible to have more than one.
- Also, a stage deliverable could be subdivided into many subsidiary deliverables in large projects.



- Simplistically, it is the output of the stage.

Stage Gate

- A stage gate is used to review one of the stage deliverables and decide how to proceed.
- These often require the approval of the project sponsor.
- Depending on the industry, some organizations do not use the term; they might be satisfied with other terms like decision point.
- In other industries, these gates could have well-defined criteria. Further, the criteria could be strict for critical gates, like the final approval of the project plans.
- In some cases, an organization might have a person assigned as a gatekeeper.

Process Deliverable

- A process deliverable is the output of a given process within the stage management processes.
- These include the stage authorization document, stage management plan, stage detailed plan, etc.

Process Gate

A process gate is used to approve one of the stage management processes.

Process gates are optional and often approved by the project manager. Meanwhile, stage gates usually require approval from the project sponsor.

D. Project Management Methodologies

This section includes general information about project management methodologies. We also define the Uruk Framework Value Delivery Methodology (VDM) and define relevant terms.

1. Essential Definitions

Project Management Methodology

Per the Uruk Framework perspective, a project management methodology:

- It is a methodological process, a general framework for tailored method development.
- It should be about managing the entire project from vision (ideation) to initial operations/PLC Closure, and beyond, until final success assessments.
- We use it as the foundation for building tailored methods.
- It consists of six components (<https://youtu.be/SiUkQrHQAHY>).



Project Management Method

- A project management method is specific to a context; please refer to tailored methods.
- We use approaches, techniques, and even “methods” while managing a project. Some practitioners refer to these as project management methods, which is fine if we understand they are limited to specific tasks or actions. An example of this would be the Critical Path Method.

2. Methodology Concepts

Plan-Driven Method

- Plan-driven method is a common term in the project management community, often used with the “waterfall” thinking.
- It implies that the **project** plan is finalized early (in detail) and then somewhat set in stone.
- Therefore, the team must follow the pre-set plan and will not allow or consider changes.
- A related term is predictive methodology.
- We do not like to use this term since we do not see it as a logical condition for real-world project management.

Predictive Method

- See plan-driven method
- Like plan-driven, we do not like to use this term since we do not see it as a logical condition for real-world project management.

Product-Driven Method

- The product-driven method is often used as a counterpoint to plan-driven, implying that we should focus on the product instead of being driven by a plan that could have become outdated.
- This is a better approach than plan-driven, but it is still not the preferred Uruk Framework since it focuses on the product, not the value.

Value-Driven Method

- The value-driven method is often used to counter the idea of plan-driven, implying that we should focus on value instead of being driven by a plan that could have become outdated.
- We subscribe to the view that competent project management has always been (or should be) value-driven. Hence, the Uruk methodology is named the Value Delivery Methodology.
- However, some in the project management community use this term to refer to agile as the logical approach focusing on value. In other words, they think organizations can only generate value

through agile. We cannot agree with this thinking since we believe project management (regardless of the approach) must focus on value and benefits realization.

Six Components of a PM Method(ology)

- This is part of the Uruk Project Management Framework.
- We propose that every project management method must have these six components.
- References: UrukPM Website, <https://urukpm.com/uruk-framework/> and this video, <https://youtu.be/SiUkQrHQAHY>.
- Also, refer to Figure 10.

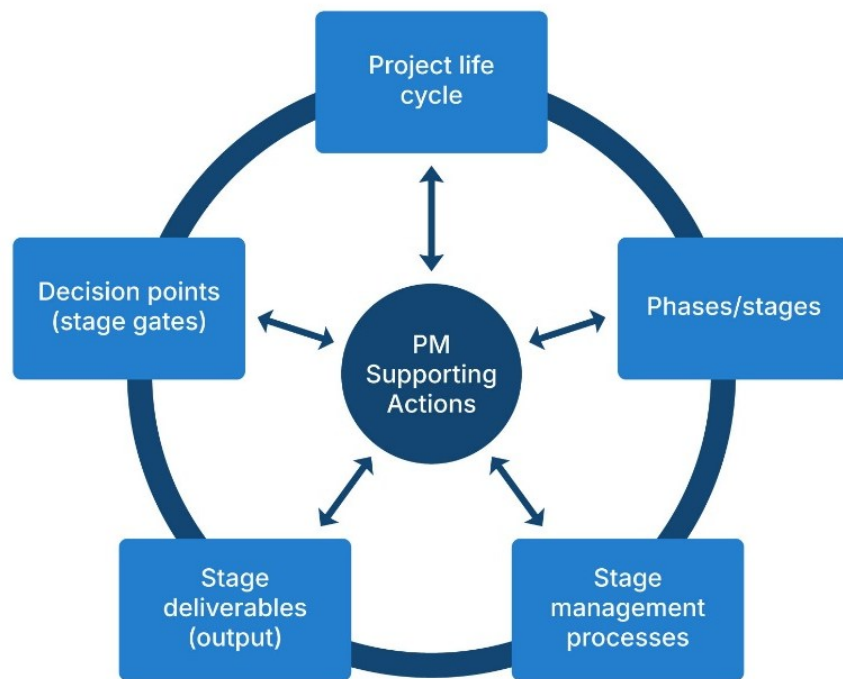


Figure 10: The Six Components of a Project Management Method

3. What Is Not a PM Methodology

The following are concepts often labeled as project management methodologies but are not. They are limited to product development or parts of the project. It is important to note that product development is the focus of a project's implementation stage.

Agile

- The term Agile is often used loosely and without context.



- Most practitioners' use of the term Agile is about agility.
- Another usage often relates to the Manifesto of Agile Software Development.
- Any reference to “agile project management” or “agile project management methodology” is not logical. This is a lengthy discussion that we leave outside this guide.
- Here is a link to a short video: https://youtu.be/MEnuDDp_uME.

Waterfall

- A waterfall is where water cascades down from a higher terrain to a lower elevation.
- In project management, some equate waterfall to traditional project management, which is inaccurate.
- The idea of “Waterfall” in project management is not logical. Therefore, any reference to waterfall project management is not realistic.
- Here is a link to a relevant video: <https://youtu.be/URwG2SqQb8I>.

Hybrid

- Hybrid is intended to be some combination of waterfall and agile, which does not make sense since neither agile nor waterfall is a project management method.
- Most of what we have seen written about hybrid methods is traditional practices by competent project managers and mature organizations.
- Therefore, we do not see hybrid as a new project management method; it is just relabeling.
- Here is a link to a relevant article: <https://blog.urukpm.com/2024/02/27/what-is-traditional-project-management/>.

Scrum

- Defined in Sec. III, Part D.

Agility

- Agility is about being flexible, dynamic, and responsive to changes.
- It is not a project management concept.
- It is a valuable mindset that can help us in our lives, organizations, and projects.

Agile Development

- Agile development is about using the values and principles of the Manifesto of Agile Software Development and similar concepts.
- Typically, this can be iterative and incremental development or both.

4. Existing Methodologies

The following are some of the existing methodologies.

Customizable and Adaptable Methodology for Managing Projects™ (CAMMP™)

- CAMMP is The Customizable and Adaptable Methodology for Managing Projects.
- Although the name implies project management, it is about value delivery since it covers a product from product vision until it is in operation and delivers value.
- Mounir Ajam's book, *Project Management Beyond Waterfall and Agile*, is the primary reference for CAMMP, Version 3.
- Subsequently, Stratija uses Version 4 of CAMMP, where CAMMP is the foundation of the knowledge base for the project and program management elements of Stratija.
- In 2022, Uruk rebranded CAMMP as the Value Delivery Methodology.

Value Delivery Methodology (VDM)™

- Value Delivery Methodology is a rebrand of CAMMP, which we modified for Stratija.
- We might use VDM and CAMMP interchangeably. However, unless we are referring to history, VDM is the adopted term that we currently use.
- We also refer to this methodology as the Level 5 model. This video discusses the project management levels: https://youtu.be/MQc_w5SZF7o.
- The methodology covers the entire project life cycle from product vision to operations (beneficial use) and final assessment.
- *Please refer to Figure 11 for the standard model.*

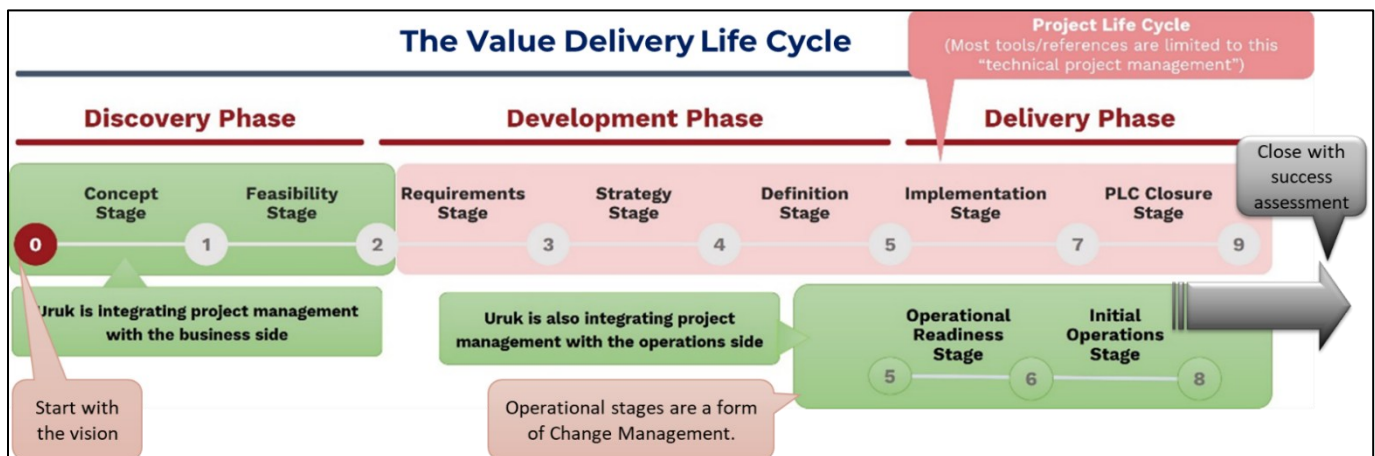


Figure 11: The Uruk Framework: Value Delivery Life Cycle, the Standard Model

Projects Integrating Sustainable Methods (PRISM®)

- Projects Integrating Sustainable Methods is a principles-based methodology focusing on sustainable development throughout the project life cycle.
- It is a methodology developed by Green Project Management.

Projects in Controlled Environments (PRINCE2®)

- Projects in Controlled Environments is a project management method.
- It is also a reference to a few related certifications.

Project DPro

- Project DPro is a reference to Project Management for Development Professionals.
- It is a methodology by PM4NGOs.

5. VDM Related Terms, Stage Management

The section includes the terms related to Value Delivery Methodology.

We start with the terms related to stage management.

Figure 12 repeats an earlier figure and shows the Uruk Framework stage management processes. It is important to note that similar documents might exist at the project level. To differentiate, we always include “stage” or “project” to eliminate ambiguity.

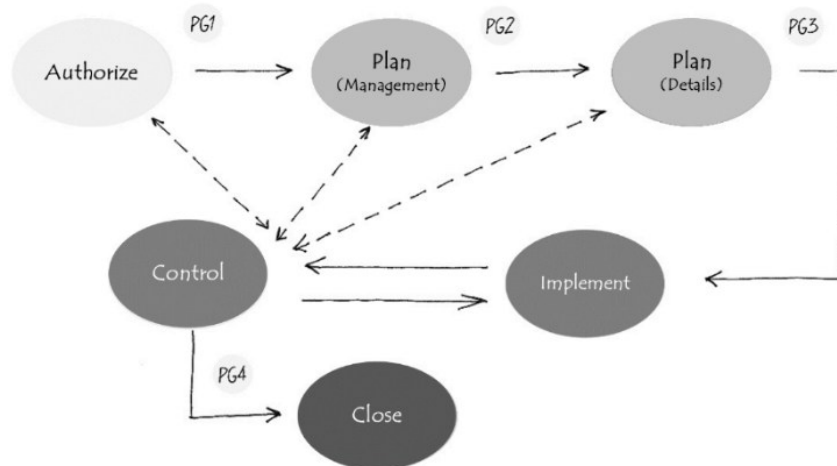


Figure 12: The Uruk Framework: Stage Management Processes



Also, please remember:

- Stratija has a simplified version of the Uruk Framework stage management processes. We use it for straightforward stages.
- Stratija also has an advanced version, which is what we describe here.
- These stage management processes, and their steps, are necessary for stages that require substantial effort, often requiring significant funds, a few months' duration, and numerous team members.
- **Also, some process steps might not apply even in substantial stages.**
- Finally, if your project work is mainly within a stage, such as application development, engineering, or construction, and you are not using the entire project life cycle, these processes would be vital for effective management.

Stage Authorization Document (SAD)

- The stage authorization document outputs the “authorize” process.
- There are four process steps under this process per the Uruk Framework, which apply as needed in every stage or phase. [Refer to Table 2.](#)
- These are the steps required for authorization and to produce a stage authorization document.
- The stage authorization document goes through Process Gate 1.

Table 2: The Uruk Framework, Stage Management, ‘Authorize’ Process, and its Steps

No	Process Step
1	Mobilize project manager
2	Identify stakeholders
3	Establish stage success criteria
4	Develop stage authorization document

Stage Management Plan (SMP)

- The stage management plan is the “plan (management)” process output.
- Seven process steps are necessary to complete the stage management plan at every stage.
- The content of the stage management plan, from one stage to another, is similar. Therefore, one can copy, paste, and modify the content from stage to stage.
- These are the steps to help manage a project stage.
- The stage management plan goes through Process Gate 2.

Table 3: The Uruk Framework, Stage Management, 'Plan Management' Process, and its Steps

No	Process Step
1	Mobilize (project) management team
2	Develop a change management plan
3	Develop a control plan
4	Develop a configuration management plan
5	Develop an initial stage schedule
6	Develop an initial stage cost estimate
7	Develop the stage management plan

Stage Detailed Plan (SDP)

- The stage detailed plan is the “plan (details)” process output.
- There are 20 process steps necessary to complete the stage’s detailed plan for every stage.
- The content of the detailed plan for each stage would vary based on the scope of the stage.
- However, regarding topics, the SDP includes the detailed scope of work, WBS, schedule, cost, quality, and all other functions—but for the given stage, not the project.
- The detailed plan for the stage goes through Process Gate 3.

Table 4: The Uruk Framework, Stage Management, 'Plan Details' Process, and its Steps

No	Process Step
1	Explore expectations
2	Create stage PBS and WBS
3	Develop stage scope of work
4	Develop stage schedule
5	Optimize stage schedule
6	Develop stage cost estimate
7	Determine stage budget
8	Identify and clarify risks
9	Assess risks
10	Plan responses to risks
11	Define quality standards
12	Define process improvements
13	Define HSE compliance requirements
14	Mobilize detailed planning team

No	Process Step
15	Determine implementation roles and staffing requirements
16	Develop stakeholders' engagement plan
17	Determine communications requirements
18	Determine resources requirements
19	Develop procurement documents
20	Outline stage detailed plan

Implement Stage Work

- The implementation process includes nine process steps.
- They are mostly related to completing the work and managing resources and contracts.
- There is no specific deliverable document for this process. However, we include sections for the project manager's comments in Stratija.
- However, the "stage work" is completing the stage deliverable.

Table 5: The Uruk Framework, Stage Management, 'Implement' Process, and its Steps

No	Process Step
1	Mobilize implementation team
2	Acquire resources
3	Select and mobilize service providers
4	Manage team
5	Manage stakeholder engagement
6	Manage communications
7	Manage contracts
8	Lead and manage stage work
9	Complete work packages

Control (Special Message)

- Some practitioners are sensitive about the word "control," especially concerning some steps (e.g., Control Team).
- The concern is about the misconception that "control" is about autocratic, dictatorship-style management.
- If that is true, one must question the organization's culture, not the term.



- Control is related to the idea that we must monitor performance and that the implementation is happening per the plan. If there are deviations or changes, the team must act to correct or adjust. This is the definition of control.

Control the Stage Work

- The control process includes sixteen process steps.
- These would be active from the start of the stage to close the stage.
- Process Gate 4 helps the team assess whether all the work on the stage is complete and whether the team is ready to submit the stage work to the stage gate (and close the stage).

Table 6: The Uruk Framework, Stage Management, 'Control' Process, and its Steps

No	Process Step
1	Control scope
2	Control schedule
3	Control costs
4	Control risks
5	Carry out quality assurance
6	Control quality
7	Carry out HSSE assurance
8	Control HSSE
9	Control team
10	Control stakeholder engagement
11	Control communications
12	Control resources
13	Control contracts
14	Control stage work
15	Control changes
16	Assess performance

Stage Completion Report (SCR)

- The stage close-out report is the output of the “close” process.
- Eight closing process steps are required to close every stage and publish the stage close-out report.



Table 7: The Uruk Framework, Stage Management, 'Close' Process, and its Steps

No	Process Step
1	Validate product
2	Close resources
3	Close contracts
4	Reconcile stage work
5	Document captured lessons
6	Assess stage success
7	Close-out report
8	Demobilize team

Please remember, the above processes and process steps are substantial. All of them (and more not listed here) might be required in some of the stages of a capital project costing millions of dollars. However, for most projects and stages, we need the six processes, but we do not need all their steps.

6. VDM Related Terms, Project Life Cycle

The following terms relate to the entire project life cycle. You can refer to Figure 11 for reference. We are including information about the stage deliverables only. Please note that we are not including the content of these deliverables or the stage gates. For details, please refer to another Uruk Guide: **Value Delivery Methodology – Stage Deliverables and Gates – Templates**.

Please note that these are the stages for medium—to large projects. A core principle of the value delivery methodology is tailoring and tailored methods. Therefore, some methods could have four stages only, whereas others could have as many as eleven.

Project Brief (PB)

- This is the output of the concept stage.
- It documents the project purpose, justification, short descriptions, and strategic alignment.
- In other words, it is a business case.



Feasibility Study Report (FSR)

- This is the output of the feasibility stage.
- It documents the feasibility study's results, which typically include topics like significant risks, market research, initial cost and schedule estimates, assessment of the organization's capabilities to deliver success, and a few other issues.
- In the Uruk Framework, the feasibility study differs from the business case. The business case documents the needs, whereas the feasibility study determines the viability of success.

Project Requirements Document (PRD)

- This is the output of the requirements stage.
- It documents the project requirements and stakeholders' input.
- It includes the product breakdown structure and the initial work breakdown structure.

Project Management Plan (PMP)

- This is the output of the strategy stage.
- It documents the project management plan, including the project management team, and updated cost and schedule estimates.

Project Detailed Plan (PDP)

- This is the output of the definition stage.
- It documents the project's detailed plan, including the project team, detailed scope of work, and the updated cost and schedule estimates that the team uses for the final funding request.
- The PDP includes many subsidiary plans for team and communication management, quality and procurement management, etc.

Implementation Summary (IS)

- This summarizes the actions and things happening during the implementation.
- During implementation, this would be a live document, like a journal, where the project manager enters the relevant information to keep the project's story alive. It can also be used for reconciliation during closure.
- It documents variations/deviations, lessons learned, changes, and other relevant information.

Operational Readiness Summary (ORS)

- This is the output of the operational readiness stage.



- It documents the project operational readiness activities, such as go-to-market strategy, recruiting, training, and numerous other activities highly dependent on the product type.
- Some projects might not have “operations”; therefore, they will not need this deliverable.

Initial Operations Summary (IOS)

- This is the output of the initial operations stage.
- It documents the project’s initial operations, such as commissioning and startup.
- Some projects might not have “operations”; therefore, they will not need this deliverable.

Project Completion Report (PCR)

- This is the output of the PLC closure stage.
- It documents the project’s completion.
- It includes the project reconciliation, a summary of lessons learned, success assessment¹⁴, and organizing the project information to upload to the project’s archive.

Project Termination Report (PTR)

- If the project was terminated before completion, the PTR will replace the PCR.
- In this case, it would document any relevant information, including the reason for the termination.
- It is a deliverable that documents the termination and associated information.

Project Close-Out Report (PCOR)

- The end of governance in the Value Delivery Methodology.
- If the project was completed, then the PCOR will be issued after the last success assessment.
- It is the responsibility of the project management unit and operations, not the project manager.
- The shift in responsibility is because the PCOR must include the final success assessment¹⁵, which cannot happen until months or years after project completion.
- The PCOR would update the PCR and include any additional information and the results of the success assessments.

¹⁴ If the organization subscribes to the Uruk Four Dimensions of Project Success, the team can only complete the assessments for the first two dimensions, technical success and project management success.

¹⁵ If the organization subscribes to the Uruk Four Dimensions of Project Success, the remaining two success assessments are product delivery success and objectives success.



7. Other Terms

Standard Model

- Standard model is a term that refers to the base model that we use in the Value Delivery Methodology.
- It is the starting point for building tailored methods.
- As is, the standard model might apply to medium-moderate or large-complex projects.

Tailored Method

- A tailored method is a bespoke project management method that applies to a given project type, class, and other variables.
- It is customized and adapted to fit a specific context.
- Please refer to a follow-up book for an in-depth discussion of the Uruk Tailored Methods and other unique Uruk terms.

Project Charter (PC)

- For Micro and Small-Simple Projects, we combine the concept and feasibility stages.
- The project charter is the output of the combined stage, providing the initial authorization for the project.

Project Plan (PP)

- For Micro and Small-Simple Projects, we combine the strategy and definition stages.
- The project plan is the output of the combined stage, leading to the project's final approval.

Sequential Development (SD)

- Sequential Development is a product development approach where the entire product is delivered as one release at the end of implementation.
- Also known as Big Bang Development (BBD).
- Reference: Strategy to Results, Book 4, Delivering Value.

Big Bang Development (BBD)

- See Sequential Development.



Iterative/Incremental Development (IID)

- Iterative/Incremental Development is a product development approach where the product is delivered via multiple releases.
- Also known as Agile Development.
- Reference: Strategy to Results, Book 4, Delivering Value.

E. Project Management Supporting Actions

Earlier, we covered the six components of a project management method; see Figure 10. To manage projects, one must manage across the life cycle, manage every stage, and manage the project management supporting actions, which we cover in this part.

This is a large part, and it consists of many topics. It is helpful to list these topics before we provide the explanations.

- 1) Scope management
- 2) Cost management, estimating
- 3) Cost management, control
- 4) Schedule management, planning
- 5) Schedule management, control
- 6) Change management
- 7) Change-related cost terms
- 8) Change-related schedule terms
- 9) Financial terms
- 10) Earned value management
- 11) Performance and reporting
- 12) People aspects
- 13) Captured lessons learned
- 14) Risk management
- 15) Resource management
- 16) Procurement management
- 17) Success
- 18) Quality management
- 19) Sustainability management



1. Scope Management

Scope

- Scope, without relevant context, could mean many things.
- We will offer a few definitions here with the relevant context.

Product Scope

- Product scope is about the product of the project; what the project will produce when it is done.
- The product could be a facility, a service, software, or other deliverable.
- It should include a description of the product and its characteristics.
- *Example: A 200 square meter modern house. A book that offers a tailored methodology for leading megaprojects and includes a project simulation using this methodology.*

Project Scope

- Project scope is about the work we must do to deliver the product scope.
- This would include the methodology and the various stages.
- *Examples: For a book project, the project scope will likely include research, writing, editing, type-setting, and publishing the book. For a facility project, the project scope would include preliminary design, engineering, construction, and commissioning.*

Scope of Work (SOW)

- The scope of work is often a document (or package) that outlines the work to be performed.
- It could be for the entire project or a given contract.
- Although the title uses “scope,” this document typically includes other information, such as schedule information, specifications, etc.
- A relatively equivalent term is the statement of work.

Statement of Work

- See scope of work.

Boundaries

- Boundaries are often necessary to clarify the scope of work and identify what is and is not included in the SOW.



- *Example: The SOW is limited to building the structure and interiors of the museum but not the outdoor facilities. The only exterior work to be included is the connections to power, water, and other services.*

Decomposition

- Decomposition is one of those mortal terms that are used in project management.
- It is used in planning to subdivide the project work into higher-level deliverables, then subdivided further to reach a working level, which we call work packages.
- Depending on the nature of the work, we could end up with 2 to 5, or more levels.
- Graphically, this would look like an organization chart or inverted tree, and we call it a work breakdown structure (WBS).
- In scheduling, we take these work packages (lowest level) and subdivide them further into activities, which would be the lowest level on a schedule.

Work Breakdown Structure (WBS)

- Work breakdown structure, or WBS, is a hierarchical representation of the scope of work.
- Graphically, it is like an inverted tree with the main and sub-branches.
- Therefore, a WBS shows the hierarchy of the scope of work.

Work Package (WP)

- Work Package is a common term in project management, and it means a work item to produce a deliverable.
- It is often the lowest practical level of a WBS.
- By practical, the intent is NOT to have the WP too detailed, down to the infinite details, or too large, not enough detail.
- A good rule of thumb is the 4/40 (or 8/80) rule.
- For example, the 8/80 rule implies that the work should not be detailed to less than a day (8 hours – for a team/crew) or longer than 80 hours (2 weeks). The reason is to maintain reasonable control.
- A work package typically includes a few activities.
- *Example: Building a foundation would be a work package (deliverable). To accomplish this work, a crew will need to excavate, clean the excavation, set steel reinforcements, pour concrete, and cure the concrete. These are the activities.*

Scope Creep

- Scope Creep is the addition of scope, often stealthily or without formal documentation.



- In other words, scope creep should be treated as a project change request, which could be approved or declined.
- However, it is common for those creating the scope creep to know it would be rejected as a change, so they try to sneak it into the project.

Scope Change

- Scope change is a type of change where one or more stakeholders ask for a change in scope.
- It is often used out of context or interchangeably with “change.” The challenge is that not all changes are scope-specific, especially if we limit the definition of scope to work (excluding quality, time, etc.),
- Even if the change is in scope, does that mean a product or project scope change? There is a significant difference, including in how to fund the change.
- For example, a change in project scope that changes something within the project objectives is typically covered by contingency. However, if the change is in the product scope and its objectives, this would typically require going back to management and possibly requesting additional time or cost. [See the section on Change Management for more information.](#)
- As a result, we avoid this term since it is ambiguous. We prefer other terms, such as contract change, project change, and objective change, which we cover in the Change Management section of this document.

Progressive Elaboration

- Progressive elaboration is a concept where the product scope is clarified and expanded from one stage to another.
- The idea is to start a project with a brief statement of work or a product vision without details. [Example: Build a 4-star hotel in Houston.](#)
- In the next stage, the team will expand on this statement of work with more information, but it may still not be detailed enough. [Example: Now, we might have architectural sketches.](#)
- The process continues until there is enough clarity to proceed to final approval. [Example: architectural design and preliminary engineering.](#)
- Therefore, as we progress from one stage to the next, we elaborate on the product scope.
- This is a form of iterative development of the project work.

2. Cost Management, Estimating

Many of the terms we define here also apply to time estimates (schedule).

Estimate

- Like scope, the term estimate on its own is often misleading.



- We must clarify if we are talking about cost or time.
- Also, there could be many estimates for a given project.
- It is common for many practitioners to consider “estimate” as a cost estimate.
- It is also not common to use the term “time estimate” and instead use schedule.

Estimating Techniques

- It is a technique that we use to estimate cost or time.
- See the following terms!

Analogous Estimating

- Analogous estimating is an estimating technique.
- It is typically conceptual and used in a project’s early stages, often in the feasibility stage.
- It provides project estimates based on similar past projects but at a high level, like total cost.
- Therefore, its accuracy is low and unsuitable for project control, but it should be good enough for early decisions.

Bottom-up Estimating

- Bottom-up estimating is an estimating technique.
- It is often used in detailed estimates since it depends on estimating from the bottom (work package level) and summarizing upward.
- Since this is a detailed estimating technique, it is often used for the estimate that will be used for final approval and funding.

Parametric Estimating

- Parametric estimating is an estimating technique.
- It is mathematical and depends on quantities and unit rates.
- It could be used with other estimating techniques (like bottom-up or analogous).
- It could be used with conceptual estimating early in the project or with other techniques later.

Cost estimating across the project life cycle

- See the following terms!

Estimate Classification

- An estimate classification system defines the different types of estimates we develop on projects.



- AACE, the Association for the Advancement of Cost Engineers, has up to five classes of estimates. However, only a few of them might be used on projects.
- On capital projects, using up to three estimates in the front end is common.
- Each estimate class requires specific requirements and produces estimates with different details and accuracy levels.

Conceptual Estimate

- See Estimate 1.

Order of Magnitude Estimate

- See Estimate 1.

Contingency Reserve

- This is the amount of money we include in the project to cover uncertainty, risks, estimating errors, and other items that we know happen from past projects.
- For organizations with good historical records, this is typically a percentage of the estimated costs. The percentage varies and depends on the estimate's class and organizational preferences.
- Alternatively, this amount could be generated from the risk assessment and the expected monetary value of risks.
- Other terms include contingency (on its own; one word) or contingency allowance.
- The contingency reserve amount would be part of the project baseline (approved cost). Therefore, it should be under the control of the project manager.

Contingency Allowance

- See contingency reserve.

Management Reserve

- This is the amount of money we include in the project to cover the unknown unknowns. These are things that the team cannot anticipate or are outside the team's control.
- For organizations with good historical records, this is typically a percentage of the approved project costs. The percentage varies and depends on the estimate's class and organizational preferences.
- The management reserve amount would not be part of the project baseline (approved cost). Therefore, it should be under the control of management, not the project manager.

The following terms are related to how we manage estimating in Stratija (or per the Uruk Framework).

Estimates per the Value Delivery Methodology

- We recommend three estimates for medium-to-large projects
- One estimate is often enough for micro projects.
- For small-simple projects, 1 or 2, depending on the situation.
- Figure 13 presents the estimates for medium to large projects, which are three estimates. These are to the left of the blue line representing the project's final approval.

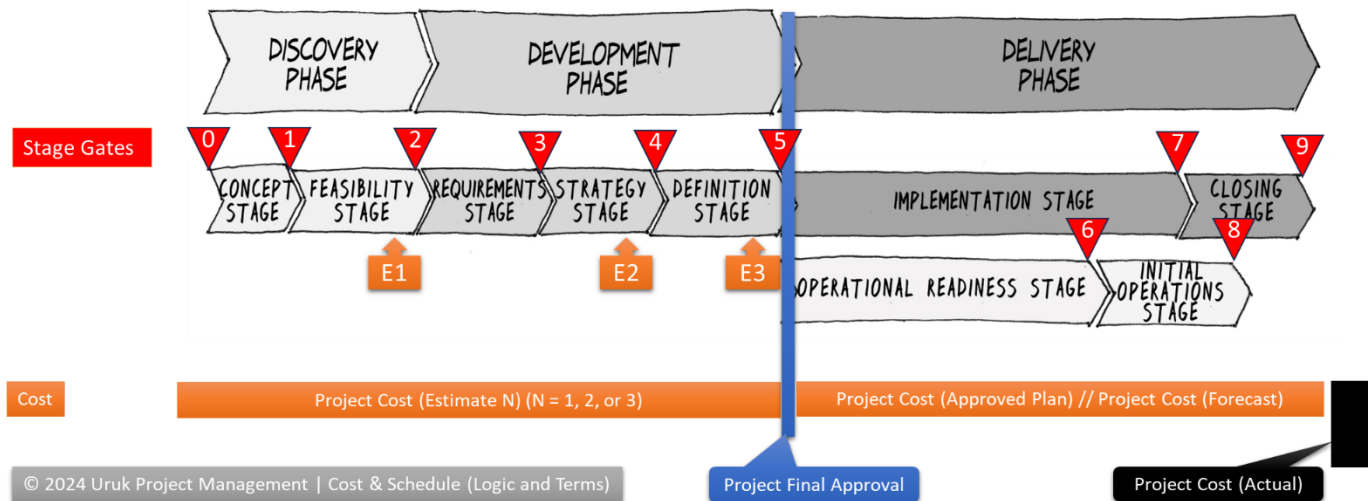


Figure 13: The Uruk Framework: Cost-Related Terms Used Across the Project Life Cycle

Types of Estimates

- The types of estimates and their names might vary from one organization and domain to another.
- Estimate types might be used interchangeably with estimate classes.

Estimate 1

- Estimate 1 is the estimate we recommend for the discovery phase during the feasibility study.
- This estimate is conceptual since the team still does not know enough about the project and likely depends on analogous estimating using comparisons with previous projects if the organization keeps the historical records.
- Alternative names would be conceptual and order-of-magnitude estimates.



- The level of accuracy of these estimates is relatively low. However, with sound systems in place, it is good enough for management to decide if the project should proceed to the next stage.

Estimate 2

- Estimate 2 is the estimate we recommend once the team has the design basis and requirements.
- It is developed during the development phase with the project management plan.
- This estimate is approximate since the team still does not know enough details about the project.
- The accuracy level of this estimate has significantly improved over the first estimate, but it is still not good enough for the final approval.
- However, with sound systems in place, it is good enough for management to decide if the project should proceed to the next stage.
- This estimate is necessary to support advanced funding, which might be required for capital projects and long lead purchases.

Estimate 3

- Estimate 3 is the estimate we recommend using for final project approval.
- It should be developed during the last stage of the development phase with the project's detailed plan.
- This estimate is semi-detailed and depends on a detailed plan, like FEED or preliminary engineering.
- The accuracy level of this estimate has significantly improved over the earlier estimates.
- Since Estimate 3 is used for funding, it becomes the baseline for project control during the delivery phase.

3. Cost Management, Control

Control

- Please refer to our definition of Control elsewhere in this document.

Cost Terms Across The PLC

- Figure 13 helps identify the cost-related terms we use across the project life cycle.
- Please note that the focus is on the overall project cost. This is why the word “project” is included with these terms.
- This project life cycle is suitable for medium-moderate and large-complex projects. However, we use the same logic for small, simple, and micro projects.



Project Cost – Estimate n¹⁶ (PC-E)

- Project cost estimate 'n' is the estimated cost for the entire project.
- Depending on the project class, we could have multiple estimates.
- Therefore, we typically add a number to the name to refer to the appropriate estimate.

Project Cost – Approved Plan (PC-AP)

- This is the project cost per approved plan and represents the approved amount for the entire project.
- In the Uruk Framework methodology, this happens at the end of the development phase (the project's final approval).
- The development phase ends at Stage Gate 5 in the standard model. However, the SG numbers could be different for other tailored methods.
- If the management accepts the final estimate, the PC-AP should equal the project's estimated cost (per the last estimate).

Project Cost – Forecast (PC-F)

- The project cost – forecast is the anticipated final cost of the project.
- We will use the term forecast once the project has moved into the delivery phase.
- At approval, the forecast would equal the PC-AP.
- At closure, the forecast would equal the project's actual cost.
- The above means that the forecast could change regularly between the approved plan and the final status. The change is due to performance matters.

Project Cost – Actual (PC-A)

- The project's actual cost is the final cost of the entire project, which we will not know with certainty until project completion.

Budget

- We do not recommend this term independently since it is often used out of context.
- If you must use it, please add a qualifier, like what we did with project cost.

Project Budget

- Project budget is often used out of context and could mean different things (same as budget).

¹⁶ N = 1, 2, or 3 so it is to clarify which estimate is the basis.



- Therefore, we avoid using this term and prefer the earlier terms linked to where we are on the project life cycle.

Project Cost

- Like the project budget, this is also used out of context.
- Therefore, as we shared here, we avoid using this term without the clarifier.

Cost Control

- Cost control is about the various actions to control the cost, which include preventive and corrective actions.
- Many of the following terms are related to cost control.

Committed Cost

- Committed cost is the cost of purchased items or services the buyer is likely obligated to pay, even if they cancel the order.
- It could include the amount already paid (expended), if any, but it could also include the outstanding amount.
- An alternative could be incurred cost.

Expended Cost

- Expended cost refers to the amount already paid for purchases or services.

Direct Cost

- In capital projects, there would be the permanent facilities that remain post-completion.
- Direct cost refers to the cost of labor, materials, and permanent equipment to build these facilities.
- *Example: Let us use building a foundation again; direct cost will be the cost of excavation, steel, concrete, and labor. It does not include the cost of management or equipment used.*

Indirect Cost

- Indirect cost refers to the cost of various things in support of building the product.
- It is for equipment, offices, management, and other things that **would not be left** in the product or permanent facility.
- *For example, construction equipment, project management, and other costs.*



Overhead Cost

- The overhead cost is a category that must be included in the project cost.
- In addition to direct and indirect costs, some costs might not be readily linked to a particular project. For example, PMO or management costs. In these situations, organizations allocate their project-related overhead to projects on a prorated basis.
- The overhead costs might not be limited to the project management unit costs¹⁷; they could include other things, such as office space and equipment costs.
- Why is this practice necessary? There could be more than one reason, such as (1) knowing the actual costs of projects instead of limiting the contractors' costs, and (2) this would help determine the cost to use for capitalization of the asset for taxation and depreciation.
- *Example: An organization has \$5 million in management costs related to the overall management of projects (or the entire portfolio) but not to specific projects. In the previous year, they spent \$500 million on projects. Therefore, they calculate $5/500 = 1\%$. Then, they add 1% to the projects this year for management costs.*

Project Management Cost (PMC)

- Project management cost is the cost of managing the project.
- It could be with internal or external resources or both.
- It is an excellent metric to have for many reasons. An organization can analyze whether it is wasteful or lean and determine the optimal project management level for a given type of project.
- We have seen the PMC anywhere from 1% to 15%, depending on the project type, context, and domains.

Contingency Rundown

- Contingency rundown is a concept we use to help develop the cost forecast for a project.
- We will elaborate on this in future editions, possibly with a separate document dedicated to this topic.

Forecast

- We defined it elsewhere in this document.

Project Cost Index (PCI)

- We could have used Cost Performance Index (CPI). However, we leave that term for Earned Value Management to use with work packages.

¹⁷ This situation might be related to the concept of a Profit Center, defined under the Financial Terms.



- The project cost index is a metric that shows the relation between the project cost forecast and the project cost-approved plan.
- The formula is like the cost performance index (CPI), but in this case, it is for the entire project and not specific work packages.
- *Formula: Project Cost Index (PCI) = Project Cost-Approved Plan / Project Cost-Forecast*

Over Budget

- Over Budget is self-explanatory and refers to when a project is over the project-approved budget.
- Some practitioners classify these projects as failures or in an overrun situation.
- *Case Study: We know of at least one organization that does not consider over-budget a failure since they expect projects to be x% over or under budget. If the project is over by less than 10%, they label it over-expended and do not require any financial control actions.*

Overrun

- Overrun is a term that could mean over budget.
- However, we prefer to use the term over-expended if it is less than 10% over and use overrun for more than 10% over.
- *In the same organization, they use the term overrun only when that forecast is 110%+ of the approved plan. As a result, they require the project to be put on hold and re-evaluated.*

4. Schedule Management, Planning

Plan

- A plan is broader than a schedule.
- A plan in the context of project management must include many variables, such as scope, cost, time, quality, and others.
- A plan helps the team follow a path, a road map, ideally to success.

Schedule

- A schedule logically represents the project plan with time. Therefore, the schedule is not the plan, a common misconception.
- Building a schedule (a model) involves many steps, such as identifying the activities and their logical relations, leading to the network diagram.
- From the network diagram, scheduling software allows us to view the schedule as a bar chart or a network diagram.
- A typical schedule provides the WBS for the project and includes activities, relations, sequence, durations, and dates.



Schedule Levels

- Schedule levels refer to the different levels of detail in a schedule.
- Five levels (or more if necessary) are expected in capital projects.
- Level 1 is the least detailed and might also be called the milestones schedule. Another term might be the executive summary schedule.
- Each subsequent level has more details than the previous level (like a WBS).
- In capital projects, level 3 (which should be semi-detailed) is often used to support funding or contract awards for engineering/construction stages. Some clients require a resource-loaded level 3 schedule with the proposal documents.
- Level 5 schedule is often used in construction, with enough details down to the activities of work packages. These could be used for weekly planning or weekly lookahead.

Milestones Schedule

- A milestones schedule is a level 1 schedule that could be one sheet of paper, even for a megaproject.
- It only shows the project stages and critical milestones, such as contract award, start of construction, and project completion.
- An alternative name is the executive summary schedule used for management reporting.

Executive Summary Schedule

- See milestones schedule.

Resource-Loaded Schedule

- A resource-loaded schedule, especially level 3, is a schedule that has the estimated resources at the lowest level in the schedule. In level 3, the lowest level could be substantial deliverables, not work packages.
- This schedule is often required with the proposals for the project implementation work.
- The value of this schedule is that it indicates that the contractors have done enough planning to maximize the chance of success. However, we have seen these schedules manipulated to give the illusion of good planning.

Network Diagram

- A network diagram is a graphical illustration showing the project's activities and their logical relationship interdependencies.



Bar Chart

- A bar chart is a timeline representation of the schedule.
- It shows the activities or summaries of the schedule plotted against the project timeline.
- An alternative name is Gantt Chart.

Gantt Chart

- See bar chart.

Critical Path

- The critical path is the most prolonged in a schedule, determining the shortest project duration.
- Consequently, it is the path with the least amount of float.
- As a result, any delay to any of its activities would increase the path length, often delaying the project.

Critical Path Method (CPM)

- The critical path method is a method used to calculate the longest path on a project.
- Typically consists of a forward and backward analysis of the entire schedule, which leads to the path of the least float.

Activity

- Activity is a scheduling term typically referring to the lowest item (row) on a bar chart displayed within a branch.
- An activity could be extremely specific, limited in scope, and assigned to resources in a schedule that provides the necessary details at the working level (this would be like a task).
- It is essential to note that the project management team may have the schedule developed down to the work package only, not the activity level. Therefore, the lowest level within a branch might not be an activity.

Effort

- Effort is one of the variables that we use to define an activity.
- It is about how much work it will take to complete an activity, measured in hours or days.

Duration

- Duration, without context, does not tell us much except the time for something.



- In the scheduling context, activity duration is the calendar time for an activity, which is different from effort.
- *Example: An activity requires 8 hours of work (effort) by one team member. However, the team member can only work 2 hours/day. Therefore, to complete the activity, the duration is 4 days. Further, if the team member starts the work on Thursday morning, the work will finish on Tuesday afternoon. Therefore, this is a six-day (calendar days) task accounting for the weekend.*

Three-Point Estimate

- A three-point estimate is an estimating technique (cost or time).
- It uses three points to estimate something: optimistic, pessimistic, and most likely.
- These estimates could then be used in statistical modeling software to determine the project's likelihood of completion at specific targets (cost or time).

Float

- Float is how long an activity can be delayed without becoming critical, i.e., extending the critical path duration.
- Some use an alternative term, Slack.
- There are different types of "float." These include total float and free float.

Free Float

- Free float is how long an activity can be delayed without delaying the subsequent activity.

Total Float

- Total float is the float on the critical path, not restricted to a single activity.
- It is used when the target completion date differs from the calculated date.
- Therefore, a negative float indicates a delay.
- On the other hand, a positive float indicates a buffer.

Milestone

- A milestone is a significant point in the project.
- It is usually about completing or starting a significant deliverable or event.
- Examples: Contract award date, kick-off, project completion date, etc.

Slack

- See Float



Planning Phase

- Many practitioners and organizations have included a planning phase in their methods or approaches. They do so because they think of the process groups as project phases.
- This is not logical for two reasons: (a) the process groups are not project phases; accordingly, the planning process is not a phase, and (b) planning is happening at multiple levels within and throughout the project¹⁸.
- Refer to rolling wave planning.

Rolling Wave Planning (RWP)

- Rolling wave planning is an iterative planning technique.
- It starts with a high-level plan (view) of the entire project, which would be highly conceptual (the green arch in Figure 14).
- Then, for each stage, we will iterate the high-level view into a (semi-) detailed plan (the red arches in Figure 14).
- If the stage is substantial in duration and effort, the team might develop a detailed monthly, bi-weekly, or weekly plan (the blue arches in Figure 14).
- Graphically, this would look like the rolling waves on a beach
- Here is a video on the subject: <https://youtu.be/kPqaVV9jBXg>.

¹⁸ This is a frequent topic in social media, and this link is to a recent discussion: <https://shorturl.at/d92U8>.

Rolling Wave Planning

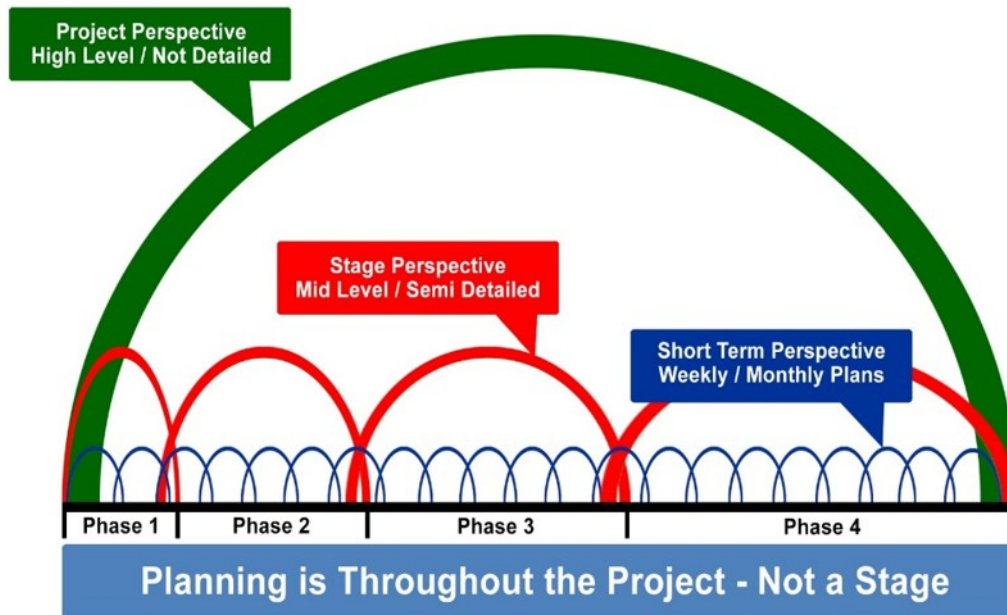


Figure 14: An Illustration of the Rolling Wave Planning Concept

5. Schedule Management, Control

Schedule Terms Across the PLC

- Figure 15 helps identify the schedule-related terms we use across the project life cycle.
- Please note that the focus is on the overall project. This is why the word “project” is in all these terms.
- We have two variables of interest for the schedule: duration and completion date.

Project Completion Date – Target

- The target project completion date refers to a management-shared date.
- The date could be a preference, “good to have.” However, it could also be mandatory, a constraint, or an imposed date.

Project Duration – Estimate n¹⁹ (PD-E)

- The estimated project duration is the estimate of the duration for the entire project.
- Depending on the project class, we could have multiple estimates.

¹⁹ N = 1, 2, or 3 so it is to clarify which estimate is the basis.

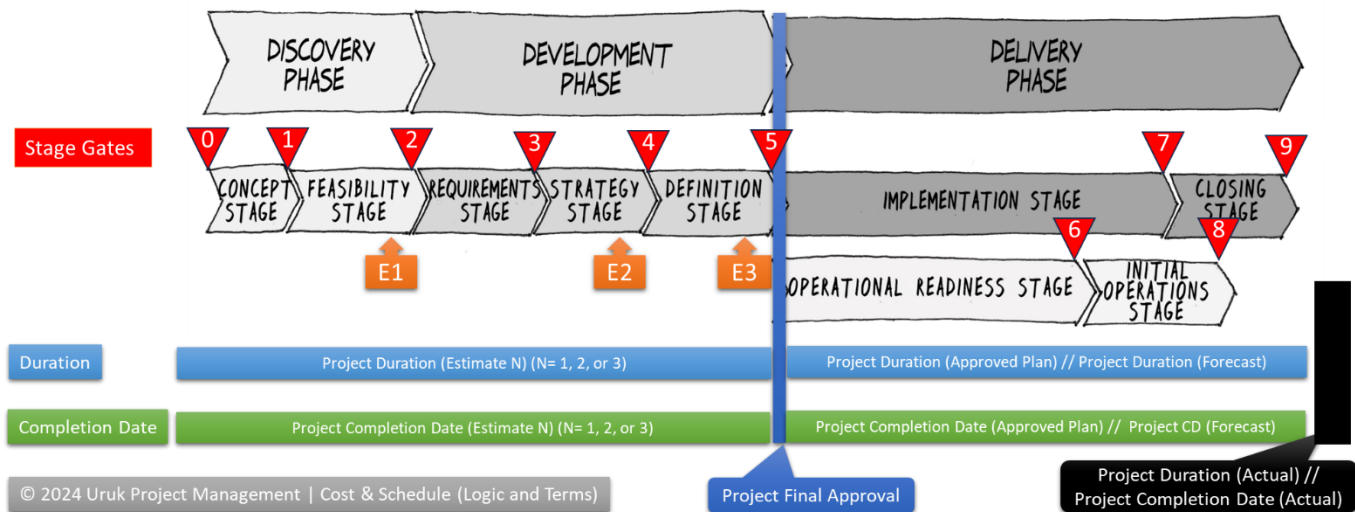


Figure 15: Uruk Framework: Schedule-Related Terms Used Across the Project Life Cycle

- Therefore, we typically add a number to the name to refer to the appropriate estimate (see Figure 15).

Project Duration – Approved Plan (PD-AP)

- The project duration – approved plan represents the approved duration for the entire project.
- In the Uruk Framework, this happens at the end of the development phase (the project's final approval).
- The development phase ends at Stage Gate 5 in the standard model. However, the SG numbers could be different for other tailored methods.
- If the management accepts the final estimate, the PD-AP would equal the project's estimated duration (per the last estimate).

Project Duration – Forecast (PD-F)

- The project duration forecast is the anticipated final duration of the project.
- We will use the term forecast once the project has moved into the delivery phase.
- At approval, the forecast would equal the PD-AP.
- At closure, the forecast would equal the PD-A.
- The above means that the forecast could change regularly between the approved plan and the final status. The change is due to performance matters.

Project Duration – Actual (PD-A)

- The project's actual duration is the final duration of the entire project, which we will not know with certainty until closure.



Project Completion Date – Estimate (PCD-E)

- The project's estimated completion date is the estimated completion date for the project.
- Depending on the project class, we could have multiple estimates.
- Therefore, we typically add a number to the name to refer to the appropriate estimate (see Figure 15).

Project Completion Date – Approved Plan (PCD-AP)

- The project-approved completion date represents the completion date for the entire project.
- In Stratija, this happens at the end of the development phase (the project's final approval).
- The development phase ends at Stage Gate 5 in the standard model. However, the SG numbers could be different for other tailored methods.
- If management accepts the final estimate, the PCD-AP will equal the PCD-E (per the latest estimate).

Project Completion Date – Forecast (PCD-F)

- The project completion date forecast is the anticipated completion date of the project.
- We will use the term forecast once the project has moved into the delivery phase.
- At approval, the forecast would equal the approved plan date.
- At closure, the forecast would equal the actual.
- The above means that the forecast could change regularly between the approved plan and the final status. The change is due to performance matters.

Project Completion Date – Actual (PCD-A)

- The project's actual completion date is the completion date of the entire project, which we will not know with certainty until closure.

Schedule Control

- Schedule control is about monitoring and controlling the schedule.
- Like other control activities, this includes capturing variations, taking preventive and corrective actions, handling change, etc.

Schedule Compression

- Schedule compression is shortening the project schedule to meet imposed deadlines.
- There is more than one technique to shorten a project schedule, including crashing and fast-tracking.



Crashing

- Crashing is a schedule compression technique where the team trades costs for time.
- In other words, increase spending to shorten one or more activities or work packages.
- *Example: Paying for air freight versus ocean or land shipping to expedite the delivery of a critical item.*

Fast Tracking

- Fast-tracking is a schedule compression technique that shortens a schedule by accepting higher risks.
- *Example: Starting work based on preliminary data instead of waiting for final data, design, etc.*

Resource Leveling

- Resource leveling is a technique to smooth or level specific resources on a project.
- It is often necessary when the schedule leads to dramatic changes in the resources required from one period to the next, and it does not make sense to mobilize and demobilize resources too frequently.
- For optimal performance, it is preferred to increase or decrease resources gradually instead of significant fluctuations.
- Resource leveling might lead to extending a project's duration.

Project Duration Index (PDI)

- The project duration index is a performance indicator, a metric showing the relation between the forecast and approved plan.
- *Formula: Project Duration Index (PDI) = Project Duration – Approved Plan / Project Duration – Forecast*

Project Completion Date Variance (PCDV)

- The project completion date variance is a performance indicator, a metric showing the relation between the forecast and the approved plan.
- *Formula: Project Completion Date Variance (PCDV) = Project Completion Date – Approved Plan (-) Project Completion Date – Forecast*

6. Change Management

Change

- A change typically refers to a conscious decision to change a plan (or an existing condition).



- It is used on projects and in organizations independent of projects (e.g., organizational change).
- Usually, a change (on projects) would start as a change request and then become an approved change, a change order, or a change initiative if approved.

Organizational Change Management (OCM)

- Organizational change management refers to the processes relevant to managing organizational change.
- Typically, these are organizational changes, such as transformation, re-engineering, re-organization, etc.
- Depending on various variables and organizational policies, OCM can be independent of or integrated with project management.

Project Change Management (PCM)

- Project change management refers to the processes and relevant information for managing project changes.
- It is a system (a subset of the organizational project management system) that would include policies, forms, guides, governance, etc.
- Although most projects are change initiatives, in this context, we focus on change within a project, not organizational change.
- The Uruk Framework has different categories of changes, such as project, contract, and objective change, which we define separately.

Change Initiative

- Change initiative is a term we often use with organizational change management or strategic planning.
- A change initiative might start as an idea and become a program or project.
- Every project is a change initiative since we change existing conditions or create new things.

Change Control

- Change control can be used interchangeably with change management.
- It is about the processes and tools we use in project change management.

Change Control Board (CCB)

- A change control board is a team within a project or the organization with the authority to decide on requested changes if the project manager and the project sponsor do not have that level of authority.



- The CCB members include representatives from the relevant stakeholders.
- This is not a common practice for most projects. However, it is helpful in some cases.

Change Request

- A change request is a formal request to make a change.
- Often, the relevant stakeholders (within the project) can make the request if authorized.
- However, a request is not an approval.
- The change request would have to be reviewed per the change management guidelines and either approved or rejected.

Change Type

- We use the term change type as one of the variables that we use in project change management.
- Typically, we have contracts, projects, and objective changes.
- Then, we could have “change category” and “change source” within each type.

Contract Change

- A contract change is a change to a specific contract.
- The contractor, the client, or a third party with the authority could initiate/request it.
- It starts with a change request, and once approved, we typically refer to it as a contract change order.
- An alternative term in some domains or regions would be a variation order.

Project Change

- A project change refers to a change within the project objective. In other words, it does affect the project plan but not the project objectives.
- Various events can trigger a project change.
- Typically, the project manager can approve a project change.
- A project change could result from or trigger a contract change.
- The contingency reserve often covers these changes.

Objective Change

- An objective change is a change that affects the objective of the project, its product, and expected benefits.
- Some organizations have strict rules to define what would be considered an objective change.
- Some might use the term scope change for this type of change.



- The objectives are defined based on the project authorization²⁰.
- These changes would require sponsor approval.
- They are likely to necessitate a change in the approved plan²¹ (cost and time).

Change Category

- A common practice is to use the term scope change for all changes. This is not good practice.
- Ideally, we need to categorize the change.
- Change categories include scope change, but could also include schedule, quality, and team changes without changing the scope.
- However, a scope change could impact the other variables, such as the team and schedule.
- Therefore, a change category would define the primary purpose of the change, and it applies to all types.

Change Source

- A change source defines the source of change: who or which group initiated it.

7. Change-Related Cost Terms

Change Cost Impact (CCI)

- Change cost impact is a metric to determine and document the impact of a given change.
- This term could also mean the total cost impact of all changes. However, we should use 'total change cost impact' in these situations.

Total Change Cost Impact (TCCI)

- The total change cost impact is the impact of all changes on the project.
- In this metric, negative and positive changes could cancel each other.
- *Example: Let us say we have many changes resulting in a \$10,000 increase for the project. Also, we have made a few changes leading to an \$8,000 decrease in project costs. The TCCI will be \$2,000 only (10,000 - 8,000).*

Absolute Change Cost Impact (ACCI)

- The absolute change cost impact is the impact of all changes on the project.
- Per this metric, negative and positive changes are additive since we use the absolute value.

²⁰ These high-level objectives define the anticipated value of the project per its business case.

²¹ This means requesting additional funding or an extension of time authorized at the same level that authorized the project.



- The value of this metric is a recognition that even cost-saving changes have a disruptive impact on the project.
- *Example: Let us say we have many changes resulting in a \$10,000 increase in the project cost and a \$8,000 decrease in the project cost. The ACCI will be \$18,000 ($|10,000| + |-8,000|$).*
- *Case Study: We had numerous changes on one megaproject, including adding and removing complete process units²². The TCCI for that project was about 2%, which is considered reasonable and low. However, when we calculated the ACCI, it was significant and disruptive. This was one of the factors that led to substantial delays and cost problems in the project. In other words, the TCCI can give the team a sense of false security, whereas the ACCI is a good indicator of the disruptive cumulative impact of changes.*

Change Cost Impact Index (CCII)

- The change cost impact index is the ratio of the impact of all changes as a percentage of project cost.
- However, when we present the CCII, we must clarify if the ratio is per the project's approved budget, cost forecast, or actual cost.
- If there is no reference, the default would be the percentage of the Project Cost-Approved Plan.
- *Formula: Change Cost Impact Index = Total Change Cost Impact / Project Cost-Approved Plan*

Absolute Change Cost Impact Index (ACCII)

- The absolute change cost impact Index is the ratio of the impact of all changes as a percentage of project cost.
- However, when we present the ACCII, we must clarify if the ratio is per the project's approved budget, cost forecast, or actual cost.
- If there is no reference, the default would be the percentage of the Project Cost-Approved Plan.
- *Formula: Absolute Change Cost Impact Index = Absolute Change Cost Impact / Project Cost-Approved Plan*

8. Change-Related Schedule Terms

Change Duration Impact (CDI)

- Change duration impact is a metric to determine and document the impact of a given change.
- This term could also mean the total duration impact of all changes. However, we should stress that this total change in duration impacts these situations.

²² A processing unit is a semi-independent part of industrial projects, like a mini plant. However, these are significant and cost tens of millions.



Total Change Duration Impact (TCDI)

- The total change duration impact is the impact of all changes on the project.
- In this metric, negative and positive changes could cancel each other.
- Example: Let us say we have many changes resulting in a 50-day increase in project duration. Also, we have had a few changes leading to a 20-day decrease in project duration. The TCDI will be 30 days.

Change Duration Impact Index (CDII)

- The change duration impact index is the ratio of the impact of all changes as a percentage of the project duration.
- However, when we present the CDII, we must clarify if the ratio is per the approved duration, forecast, or actual.
- If there is no reference, the default would be the percentage of the Project Duration-Approved Plan.
- *Formula: Change Duration Impact Index = Total Change Duration Impact / Project Duration-Approved Plan*

9. Financial Terms

CAPEX

- CAPEX is a common term that refers to capital expenditure.
- When the project is complete, capital expenditures are funds that would become part of the organization's capital assets.
- This term is related to taxation rules since capital assets depreciate over the product's useful life.

OPEX

- OPEX is a common term that refers to operating expenditure.
- These would be expenditures reported as expenses in the year spent.
- This term is related to taxation rules.

Advanced Funding

- Advanced funding is a common practice in the capital projects sector.
- It is temporary funding until the full funds are approved and released.
- Why is it needed? (1) Some of the work in the development phase might require significant funding. More funds than typically allowed from operating budgets. (2) The project might also need to place purchase orders/contracts for long lead items (before final funding).



- Therefore, the organization's governance and financial control rules might require advanced funding, which might be 3-10% of the estimated project cost.
- These advanced funds will be kept in a temporary financial control account until final funding is secured.
- Upon final approval, the funds will move from the temporary to the capital accounts.
- If the project is canceled before final approval, the expenditure will move into an expense account for taxation purposes.

Final Funding

- Final funding refers to the final approval when the organization authorizes the funds for the project.
- It typically happens with the approved plan at the end of the development phase.
- In industrial projects, an alternative term is the Final Investment Decision (FID).

Opportunity Loss

- Opportunity loss refers to the potential benefits or advantages foregone when choosing one alternative over another.
- It represents what could have been gained if a different decision had been made.
- *An example: A company is evaluating two projects; one will lead to \$1 million in profit, and the other will provide \$1.2 million. If the company can only manage one of these two projects, it will likely select the \$1.2M project (higher profit). Then, they can also say that there is a \$1M opportunity loss, which is the value of the other project.*

Opportunity Cost

- See opportunity loss.

Final Investment Decision (FID)

- See final funding

Net Present Value (NPV)

- Net Present Value (NPV) is commonly used in capital budgeting and investment analysis.
- It is a financial metric used to evaluate the profitability of an investment or project.
- It accounts for the time value of money, recognizing that the value of money changes over time due to its earning potential.
- It represents the difference between the present value of cash inflows and outflows over a specific period, discounted to the present value using a specified discount rate.



Return on Investment (ROI)

- Return on investment (ROI) is a financial metric that evaluates the efficiency or profitability of an investment.
- It measures the amount of return relative to the investment's cost.

Profit Center

- The profit center is a division that operates within specific guidelines.
- The division has costs but can also generate revenues for its services.
- In some situations, this concept is used internally, where a division can charge other divisions for their support work.
- Therefore, the division designated as a profit center must fund its work, at least at the breakeven point, but it could also earn a small profit.
- *Example: Some organizations treat the project management department (division, business unit) as a profit center, even though all their projects are internal. Therefore, where project management personnel are assigned to a project, they bill their 'customer' for the service²³.*

10. Earned Value Management

The part includes the primary variables and metrics used in earned value management.

Earned Value Management (EVM)

- Earned value management is a systematic approach that we use on projects.
- It helps us determine the health of a project since it integrates scope, cost, and time.
- It helps determine whether work is progressing per plan or experiencing deviations.
- It is also used to help update the project forecast (cost, duration, completion date).

Earned Value Analysis (EVA)

- Earned value analysis is the team's analysis using the earned value management approach.
- This would include determining EV, PV, AC, and other variables
- It should be from the bottom up, i.e., starting at the work packages level.

Earned Value (EV)

- Earned Value is an earned value management term.
- It refers to a work package's budget, but only for the completed work (performed, achieved).

²³ In Mounir Ajam book, *Successful Transformation*, there is a chapter dedicated to this topic.



- An alternative term is Budgeted Cost of Work Performed (BCWP).
- In Uruk, we use EV instead of BCWP.

Planned Value (PV)

- Planned Value is an earned value management term.
- It refers to a work package's budget, but only for the work scheduled to date, regardless of whether it was completed.
- An alternative term is Budgeted Cost of Work Scheduled (BCWS).
- In Uruk, we use PV instead of BCWS.

Actual Cost (AC)

- Actual Cost is an earned value management term.
- It refers to a work package committed or expended cost.
- An alternative term is the Actual Cost of Work Performed (ACWP).
- Although we prefer terms like ACWP, in Uruk, we use AC instead of ACWP.

Budgeted Cost of Work Performed (BCWP)

- See Earned Value

Budgeted Cost of Work Scheduled (BCWS)

- See Planned Value

Actual Cost of Work Performed (ACWP)

- See Actual Cost

Budget at Completion (BAC)

- Budget at Completion is an earned value management term.
- It refers to a work package's entire budget. We are unsure of the reason for "at completion" since the budget should be fixed from beginning to end.
- If there is an approved change, the budget could change.

Estimate at Completion (EAC)

- Estimate at Completion is an earned value management term.
- It refers to the expected cost of a work package when completed



- Therefore, it is another way of saying the forecast.

Estimate to Complete (ETC)

- Estimate to Complete is an earned value management term.
- It refers to the estimated cost to complete a work package.
- Alternative terms would be the remaining cost or cost to complete.

Cost Variance (CV)

- Cost Variance is an earned value management term.
- It is the difference between the earned value (EV) and actual cost (AC).
- *Formula: $CV = EV - AC$*

Schedule Variance (SV)

- Schedule Variance is an earned value management term.
- It is the difference between earned value (EV) and planned value (PV).
- *Formula: $SV = EV - PV$*

Cost Performance Index (CPI)

- The cost performance index is an earned value management term.
- It is about cost efficiency.
- It is a ratio: The earned value (EV) over actual cost (AC).
- *Formula: $CPI = EV / AC$*

Schedule Performance Index (SPI)

- The schedule performance index is an earned value management term.
- It is about work productivity.
- It is a ratio: The earned value (EV) over planned value (PV).
- *Formula: $SPI = EV / PV$*

Time-Phased Budget

- A time-phased budget is a technique and typically a chart that shows the budget of work packages, deliverables, or the entire project over the project's timeline.
- This time-phased budget can help assess project performance, create a forecast, and be useful for cash flow management.



Forecast

- A forecast is a prediction of the final status.
- The term 'forecast' concerns cost, duration, and completion date.
- The forecast would change as the project progresses based on various variables and the project's performance.
- At final approval, the forecast would equal the approved budget, duration, or completion date.
- At closure, the forecast would become the actual cost, duration, or completion date.
- The official Uruk terms are project cost – forecast, project duration – forecast, and project completion date – forecast.
- *Formula: Forecast = AC + ETC.*
- However, there are many ways to calculate ETC.
- Further, the actual act of forecasting is much more intensive than a formula. Refer to the Six Steps of Performance Management.

11. Performance & Reporting

Dashboard

- A dashboard visualizes and displays various performance metrics and charts in one place.

Executive Dashboard

- We use this term interchangeably with dashboards.
- The word executive (in the name) emphasizes that the dashboards are designed for executives' view.

Key Performance Indicator (KPI)

- Key performance indicators refer to specific metrics that provide input on how something is performing.
- In Uruk, we avoid using this term and prefer metrics.

Metrics

- We use metrics in project management to represent an index or a performance indicator.
- A metric would be a mathematical calculation of two or more variables, with ratios being widespread metrics.
- For example, we shared information about PCI, CPI, TCCI, etc. These are metrics.



Performance Chart

- Typically, it is a graphical representation of one or more metrics.
- It could be related to a project, program, or portfolio.
- We can have performance charts for the various project management actions.
- Some charts could show information about performance on the report date, like the PCI = 1.1 (per the latest report). Other charts would show the PCI trend over the project time span.

Project Status

- A field we use to define the status of the project.
- In Uruk, we have six status conditions: Future, Active, Hold, Terminated, Completed, and Closed.

Project Performance Status

- A label we use to define how the project is performing.
- This could be a series of labels.
- For example, over or under budget, overrun, ahead or behind schedule, etc.
- We could also use other designations, such as healthy (green), caution (amber), troubled (red), etc.

Project Status Report (PSR)

- The project status report summarizes the project status and progress.
- It typically includes information about progress, issues, risks, changes, performance, etc.

Troubled Project

- A troubled project is a project in trouble.
- The criteria for designating a project in trouble vary and highly depend on the organization's culture and systems.
- We recommend not using this term for reasonable variations of the performance metrics and only using it when a project is likely to fail, leading to termination, or maybe it should be canceled.

Abandoned Project

- A project that is being abandoned before completion.
- These types of projects are often killed without notification.
- We do not think this is good practice; instead, the project should be formally terminated.



Terminated Project

- A project that is being terminated before completion.
- In this case, the project manager/sponsor should complete a Project Termination Report.

Recovery Plan

- A recovery plan is a term that we avoid for many reasons.
- When a project is in trouble, it isn't likely to recover fully (i.e., finish within the original plan parameters).
- Likely, the team could still complete the project, but with some damage, failing to meet some objectives.
- Therefore, the term is misleading, and we prefer an alternative term, re-plan.

Re-Plan

- A re-plan might be required when a project faces challenges and is at risk of failure.
- A proper re-plan would start with understanding the root causes of the challenges and accepting that some damage has been done.
- Therefore, a re-plan would often require an extension of time or accepting that the project will be over budget or overrun.
- Depending on organizational policies, the re-plan might require additional funding.

Reconciliation

- Reconciliation is used when closing a stage, the project, or every forecast update.
- It explains what happened (good or bad), which we can determine by comparing the actual with the plan.

12. People's Aspects (Roles)²⁴

Project Manager

- The project manager is the person leading a project.
- However, based on industry and type of project, the role and associated authority can vary greatly; see Project Management Levels.

²⁴ We do not include all possible roles here because the list increases in size significantly.



Accidental Project Manager

- An accidental project manager has not yet been trained in project management.
- Someone is moved into a project manager role from another role.
- This person might be a good performer in their prior role, and management assumes it is good enough to be assigned as a project manager.
- This is a risky practice and might lead to problems on a project if not for failure.
- We are not against the concept; however, organizations must manage it better.

Project Coordinator

- A project coordinator is a person assigned to coordinate with other team members on a project.
- This role might exist when there is no need for a dedicated project manager.
- In these situations, the coordinator might report to a functional manager.

Team Leader

- A team leader is a generic term for anyone leading a team, within and outside project management.

Stage Leader (SL)

- A stage leader is a role for someone on the project management team who leads a given stage's work.
- The authority is like a project manager, but only for the given stage.
- An alternative would be a stage manager, often using the stage's name, e.g., engineering manager.
- Stratija includes this role.

Team Member (TM)

- A team member is any member of the project team.
- The team member could be one of the project management team members or outside the PMT.

Project Management Team (PMT)

- The project management team comprises the resources to help the project manager manage the project.
- In some organizations and certain project types, the PMT might be limited to the project manager.
- The team members are project professionals, not those doing technical work.
- These project management specialists include positions like cost estimating, cost control, planning, etc.



Project Team (PT)

- The project team consists of different professionals working on a project.
- For reference, we call these technical specialists.
- These include the project manager, team leaders, project management team members, and technical team members doing the technical/functional work.
- Some references consider the project sponsor part of the team; others show the sponsor is engaged with the team through the project manager, but not embedded with the team.
- We see the project sponsor as part of the extended project team since this role oversees all.

Extended Project Team (EPT)

- The extended project team is a Uruk term uncommon in the community.
- In certain domains, we can use it interchangeably with the project team.
- However, we prefer to use it as a different term from the project team.
- The EPT includes the PT and the operations personnel, who are responsible for commissioning and operating the project product.

Project Sponsor

- The senior manager or executive within an organization who is accountable for a project.
- Uses authority to clear project roadblocks, such as negotiating with other organizations and securing resources.
- The project sponsor's role is for those who can approve the stage gates (decision points).
- They are the ones who can activate, reject (cancel), hold, and remove the hold on projects.

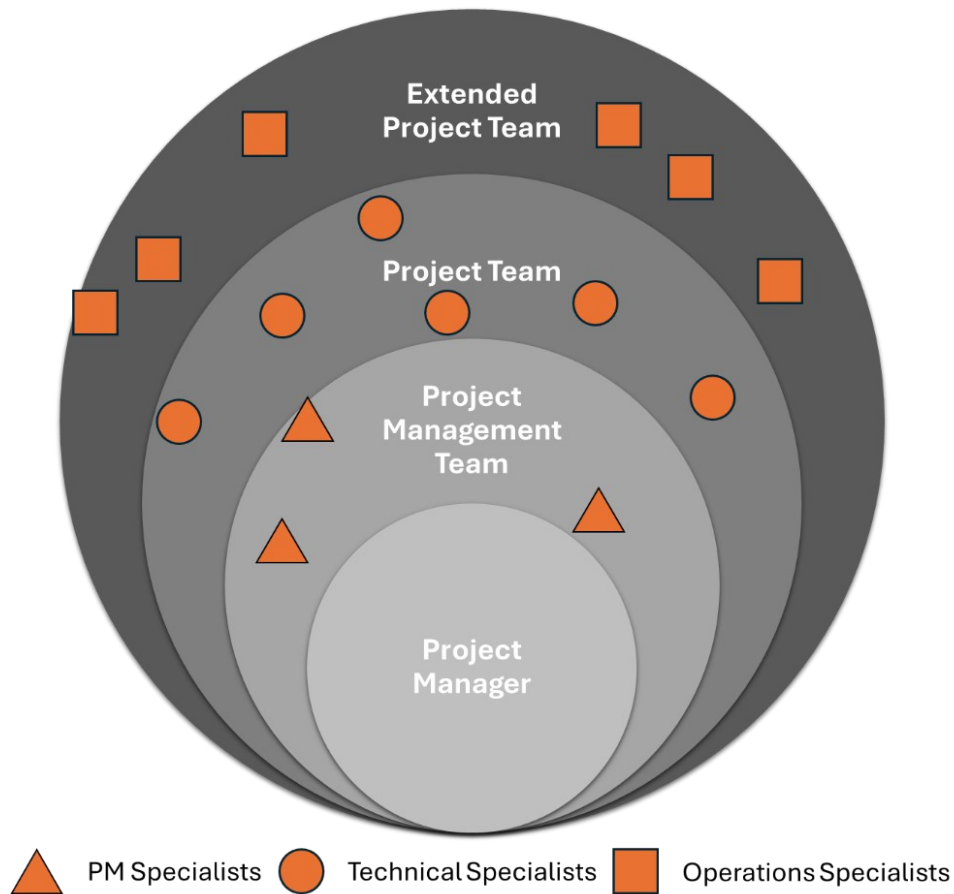


Figure 16: The Relationship Between "Teams" in a Project

Project Executive

- A project executive is often an alternative term to project sponsor.
- It is the preferred term in the capital project sector.

Functional Manager

- A functional manager is a department or division manager in an organization.
- Basically, this refers to an organizational function, like finance, marketing, etc.
- In Uruk, we use an organizational unit manager.

Organizational Unit Manager

- Organizational unit manager is a Uruk term that generically refers to an organizational unit's head.
- The OU could be a division, department, section, business unit, etc.
- In this context, the "manager" could be a manager, director, VP, EVP, CxO, etc.



- In some situations, the OU Manager is a Functional Manager.

Program Sponsor

- A program sponsor is the same as a project sponsor, except it is for the program.

Program Manager

- A program manager leads a program, including all its projects.
- Therefore, the program manager can access all projects within the program and oversee the project managers.

Program Management Team (PMT)

- The program management team is a group of people who will help the program manager manage the program.
- These are project and program management specialists, not those doing the technical work.
- Those technical resources will be part of the program team.

Program Team (PT)

- The program team includes the program manager, program sponsor, program management team, and the technical resources performing program work.

Shareholder

- A Shareholder, also known as a stockholder, is an individual, company, or institution that owns shares in a company's stock or holds shares in a mutual fund.
- These could be investors or venture firms.
- The key factor is that these people/entities have a financial stake in an organization.

Stakeholder

- A Stakeholder is a person or group interested in an enterprise or a project.
- These individuals or entities can either affect or be affected by the project.
- Some might have direct influence, while others might be passive or have limited influence.

Interested Party

- An interested party is a recent term replacing stakeholders.
- We are not sure why this term is considered the preferred politically correct term.
- We have seen cartoons linking the change in terms to avoid offending vampires 😊.



Gatekeeper

- A gatekeeper is a role that might exist in organizations that follow the stage gate model and must ensure a high level of governance.
- In these situations, the role would be a manager who helps coordinate the stage gate reviews.

PMO Specialist

- A PMO specialist is a generic role that exists within a PMO.
- It is like a project management specialist, but the role is linked chiefly to PMO activities.

PMO Manager/Director

- A PMO manager is the manager of a PMO.
- In some organizations, this could be at the director's level.

Chief Projects Officer (CPO)

- A Chief Projects Officer (CPO) is an executive-level position.
- If the organization recognizes project management as a core function, the CPO would be the leader of the project management function.
- An alternative title could be chief project management officer or vice president – projects (or project management).

13. Captured Lessons Learned

Captured Lesson (CL)

- A captured lesson is when the project team members encounter a lesson and document it.
- Typically, this is limited to identifying, documenting, and adding the lesson to a database if the organization adopts that practice.
- A lesson could be something good or a problem encountered.
- Generally, any time the team runs into a situation that could have been avoided or planned, that would be a captured lesson.
- An alternative widespread term is a lesson learned, but we avoid it since we use it to mean something else.

Lesson Learned (LL)

- A lesson learned, as used in the community, is a captured lesson in Uruk.



- We use this term to mean something else: a reference that the organization has learned that lesson.
- Here is our logic. We often run into organizations that might discuss their lessons (calling them lessons learned), but the process ends there. Other organizations might document the lessons (captured) and add them to a database, only to be forgotten. What we are implementing in Stratija is a process to capture and learn from the lessons.

Captured Lessons Learned (CLL)

- This is the name of a module in Stratija. It includes the CLL database, workflow, and other relevant information.
- For more information, we have a document that explains this concept, which we include in the Knowledge Portal.

CLL Cost Impact

- The CLL cost impact is a metric showing the cost impact of a captured lesson on a project, a program, or the entire portfolio.
- This could be estimated, or we would prefer to capture the actual cost if possible.

CLL Net Cost Impact

- The cost impact of all captured lessons on a project, a program, or the entire portfolio.

CLL Time Impact

- The CLL time impact is a metric showing the duration or completion date impact of a captured lesson on a project, a program, or the entire portfolio.
- This could be estimated, or we would prefer to capture the actual cost if possible.

CLL Net Time Impact

- The CLL time impact is a metric showing the duration or completion date impact of all captured lessons on a project, a program, or the entire portfolio.

CLL Avoided Cost

- CLL avoided cost is a metric showing the estimated cost savings from past captured lessons learned if the team could apply them to the current project, a program, or the entire portfolio.
- In Stratija, we encourage project managers and teams to review the CLL during stage planning and identify potential opportunities that could lead to cost avoidance.



CLL Avoided Delay

- The CLL delay avoidance is a metric showing the estimated delay avoidance if the team can apply past captured lessons learned to the current project, a program, or the entire portfolio.
- In Stratija, we encourage project managers and teams to review the CLL during the planning process and identify potential opportunities that could lead to delay avoidance.

14. Risk Management

First, we start with a few general terms.

Risk Management

- Risk management is about the processes used to manage risks.
- It starts with the risk management system, part of the organizational project management system.
- Then, on projects, it includes many process steps, such as identifying, assessing, responding, etc.

Risk

- A risk, or risk event, is uncertain; if it happens, it could impact the project or its objectives.
- In the past, we viewed risk as Threats and Opportunities.
- However, most practitioners view risks as threats, so we separate threats from opportunities.

Threat

- A threat is an uncertain event; if it happens, it could negatively impact the project or its objectives.

Opportunity

- An opportunity is an uncertain event; if it happens, it could positively impact the project or its objectives.
- Some might call this a positive risk. However, we disagree with that reference.

The following few terms are related to how we analyze risks.

Probability

- Probability is about the likelihood, the chance of an uncertain event occurring.
- In qualitative terms, we typically use high, medium, and low.
- In quantitative terms, we might have an actual number or a percentage to represent this probability.



Impact

- Impact, or consequence, results if an uncertain event (threat or opportunity) occurs.
- In qualitative terms, we typically use high, medium, and low.
- In quantitative terms, we might have an actual number, an amount of money, or days, positive or negative.

Expected Monetary Value (EMV)

- Expected monetary value is used in risk management.
- It helps in understanding the relative value of an uncertain event.
- It is used when we have quantitative analysis.
- It is calculated by multiplying the probability by its expected impact.
- *Formula: EMV (Expected Monetary Value) = P (Probability) x I (Impact)*

Qualitative Risk Analysis

- Qualitative risk analysis is the qualitative analysis of the risk events, probability, and impact.
- By qualitative, we mean using a general high, medium, and low scoring.

Quantitative Risk Analysis

- Quantitative risk analysis is the quantitative analysis of the risk events, probability, and impact.
- In this case, we should have enough data to estimate the probability as a rough number (reasonably accurate).
- Also, we should be able to determine the impact on cost and schedule.
- The impact could be on other project areas, like team, quality, procurement, etc. However, we always attempt to convert that impact into cost or duration.

Monte Carlo Analysis

- Monte Carlo analysis is a technique used in risk management to assess the potential outcomes of "X."
- X could be cost or schedule, or a completion date.
- It is a mathematical simulation involving many trials, leading to a range of distributions.
- Example: A Monte Carlo Analysis can tell us the probability of completing the project on a specific date, a 50% chance of completing the work on March 25, 2025, or a 90% chance of achieving it on August 11, 2025.



The following few terms are related to how we respond and manage risks.

Risk Mitigation

- Risk mitigation is a risk response strategy that minimizes the impact and consequences of a risk event.
- In these situations, the team spends some money and effort on a significant risk to reduce its probability of occurrence or impact.

Risk Avoidance

- Risk avoidance is a risk response strategy that focuses on changing the plan to avoid the risk.
- The risk will be resolved in these situations and is no longer a concern.
- However, it could lead to a secondary risk (like a side effect) that would be lower in probability or impact.

Risk Transfer

- Risk transfer is a risk response strategy that focuses on transferring the risk to another party to manage it.
- In this case, the risk does not go away; it is still a concern, but someone else is responsible.
- Responsible means the other party will manage and deal with the consequences.
- Insurance is a form of risk transfer.

Workaround

- A workaround is a passive form of risk response.
- It is used with low-priority risks that could be numerous and that are part of every project. In other words, the effort to respond to them in advance might not be justified.
- Therefore, the decision would be to “work around” these risks when they occur.

Contingency Plan

- A Contingency plan is like a backup plan.
- It is different from contingency allowance or contingency reserve.

Contingency Reserve

- Defined in the cost management part.



Management Reserve

- Defined in the cost management part.

15. Resource Management

Resource Management

- Resource management is about managing the project's resources.
- We could also use the term for a program, a portfolio, or an organization.
- We prefer to use 'team management' for the people side of resources.
- Limit the use of resource management for physical resources.

Resource

- A resource could be a person, machine, tool, etc.

Resource Center

- Resource center is the name of a module in Stratija's portfolio management element.
- We have not built it yet, but we intend to have two sections, one for the people's aspects and another for the physical resources.

Physical Resource

- A physical resource could be a machine, tool, or office and furniture, especially on capital projects.

Resource-Loaded Schedule

- We defined elsewhere in this document.

16. Procurement Management

Request for Information (RFI)

- A request for information is often an official correspondence from a service provider to clarify some ambiguous points or issues.
- It could also come from the project owner.

Request for Bid (RFB)

- A request for bid is when a "buyer" requests bids from various potential "sellers."



- The terms bid and proposal might be used interchangeably. However, a bid is often used when the scope is clear, and the request is mostly for pricing. On the other hand, a proposal is asking for a solution and pricing.

Request for Proposal (RFP)

- A request for proposal is when a “buyer” requests a proposal from various potential “sellers.”
- It could be a request from one seller or a single source.
- The terms bid and proposal might be used interchangeably. However, a bid is often used when the scope is clear, and the request is mostly for pricing. On the other hand, a proposal is asking for a solution and pricing.

Purchase Order (PO)

- A purchase order is often used with defined specifications when purchasing materials.
- It is issued by a buyer to a seller.

Contract

- A contract is an agreement between two parties, often subject to the laws of a specified jurisdiction.

Contract Award

- A contract award is about the official issuance of a contract.

Letter of Intent (LOI)

- A letter of intent is a letter that a prospective buyer might sign indicating they are seriously considering a purchase or a contract.
- It could also be from a buyer to a seller indicating they are seriously considering awarding a contract or making a purchase.
- The LOI is used because one or both parties are not ready to commit yet.
- An LOI is often not legally binding.
- However, if some work is conducted under an LOI, there will be a mechanism for paying for the services.

Claim

- A claim results from disputes between the parties to a contract or purchase agreement.
- If the claim is unresolved through mediation or arbitration, it could go to court.



Mediation

- Mediation is a technique used where a designated mediator works with two parties to resolve a dispute amicably.

Arbitration

- Arbitration is used when two parties have a dispute and want to resolve it outside the court system.
- Often, the parties would have agreed to use arbitration when they signed the contract.
- The arbitration is expected to use three arbitrators, one named by each party and the third selected through other means, which the other two arbitrators may choose.

Arbitrator

- An arbitrator is often registered with a court system to participate in arbitration proceedings.
- This person will often have enough expertise in the work industry under dispute and may have some legal or contractual experience, but not necessarily be a lawyer or a judge.

Buyer

- Buyer is a term for the party wanting to purchase something or obtain contracts.

Seller

- A seller is the party offering services or materials.
- A seller could also be a buyer.
- For example, a contractor selling services to a buyer might need to hire subcontractors or do some of the work.

Long Lead

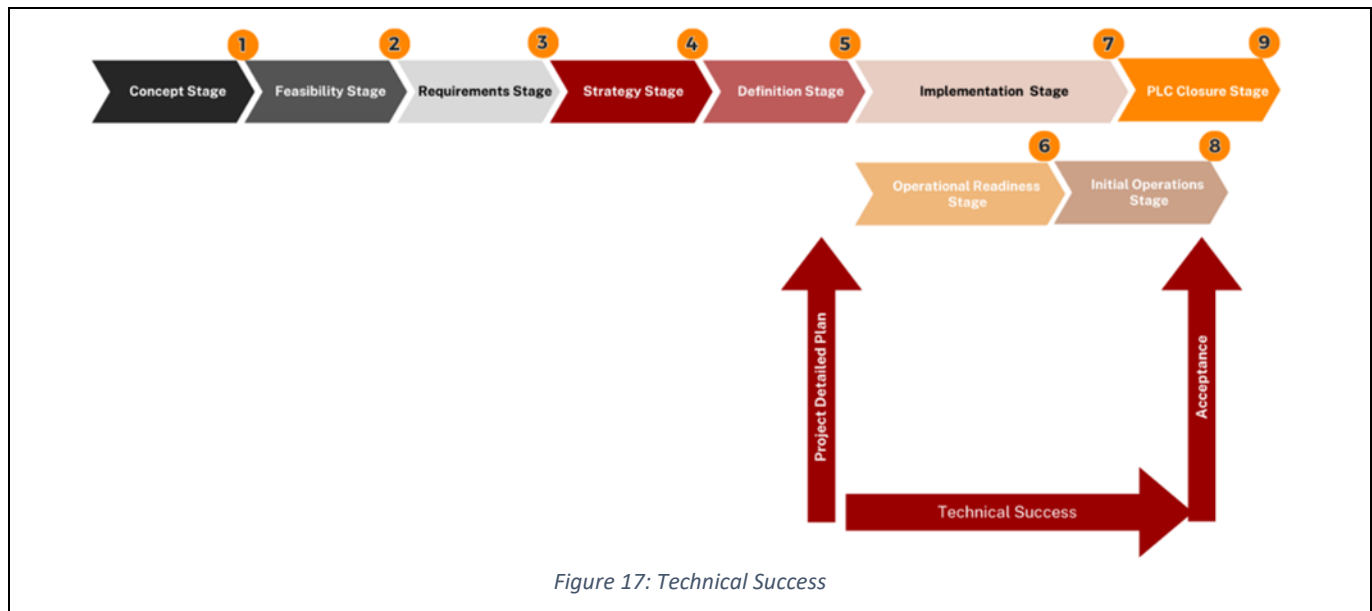
- Long lead is a term we often use with long lead equipment (or something like that).
- It is for things that will take a long time to deliver after the purchase or contract award.
- It is common in the capital projects sector.
- Consequently, organizations might order these items sooner than the ideal time based on preliminary design data (increasing risks). This is a form of fast-tracking.

17. Success

Four Dimensions of Project Success

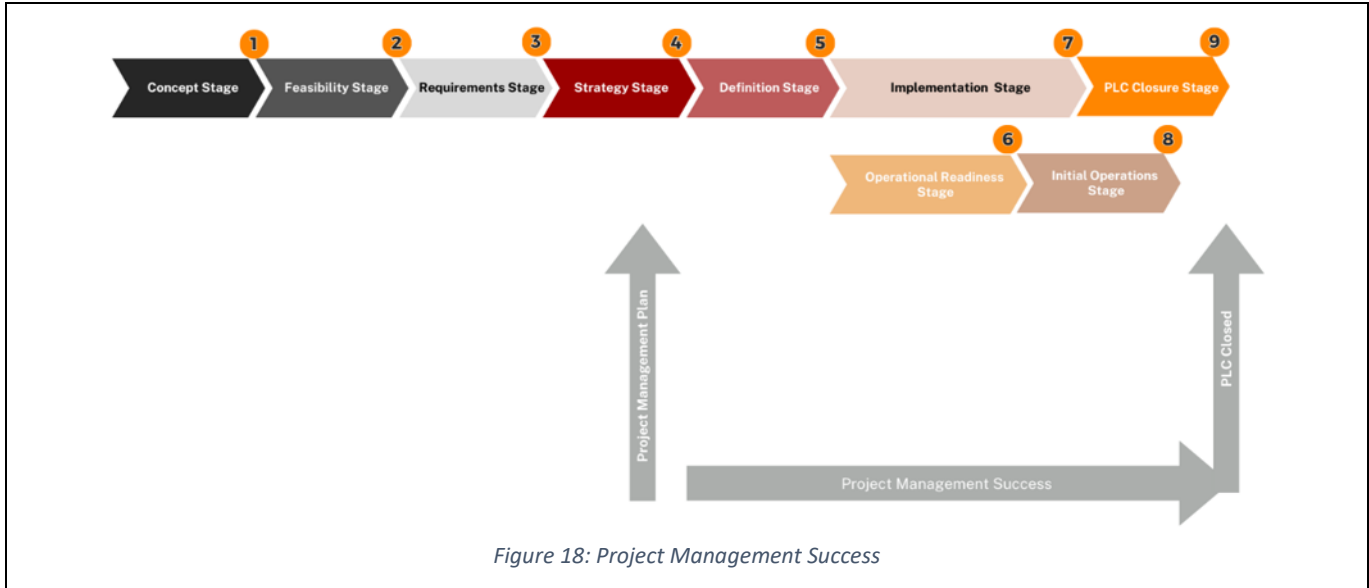
- The Four Dimensions of Project Success is one of the Uruk Framework solutions.
- It offers a model for assessing project success for projects and programs.
- Reference: UrukPM Website - <https://urukpm.com/the-four-dimensions-of-project-success/>, and a video - <https://youtu.be/z2Vr6Qz1sBw>.

Technical Success



- Technical success is the first dimension.
- It is about assessing the success of the delivered product in terms of scope and quality.
- The reference point is the project's detailed plan at the end of the development phase.
- Assessment is possible with final acceptance during the PLC Closure Stage.
- Please refer to Figure 17.

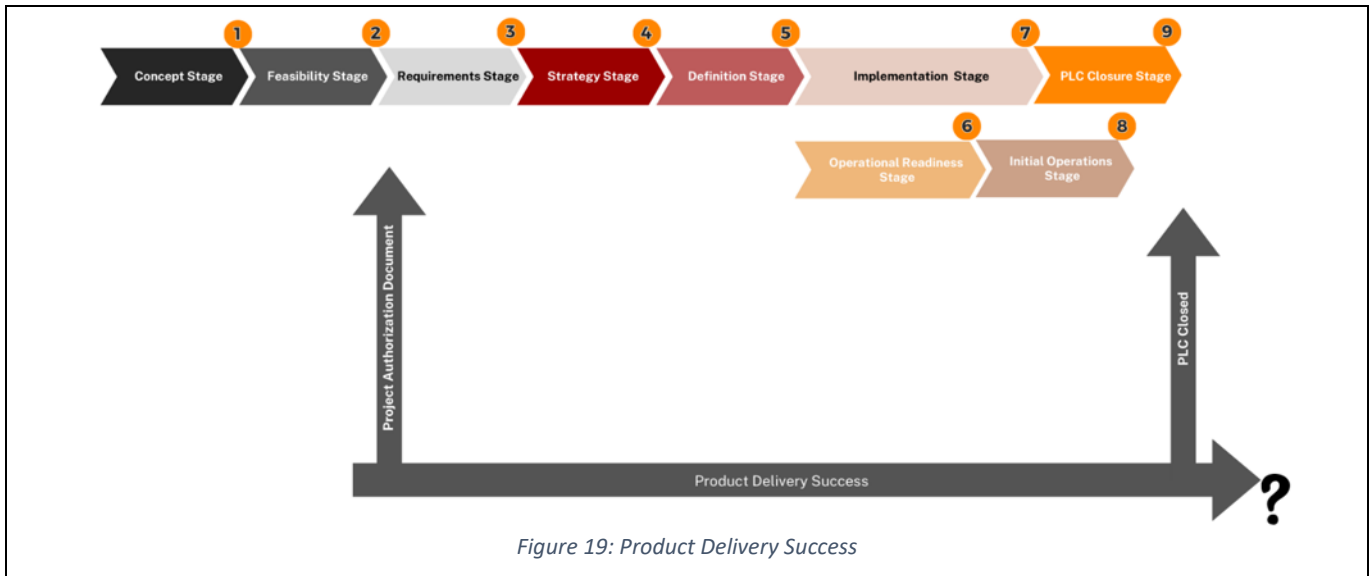
Project Management Success



- Project management success is the second dimension.
- It is about assessing the success of the project management effort in terms of cost and schedule.
- The reference point is the project management plan.
- Assessment is possible during PLC Closure.
- Please refer to Figure 18.

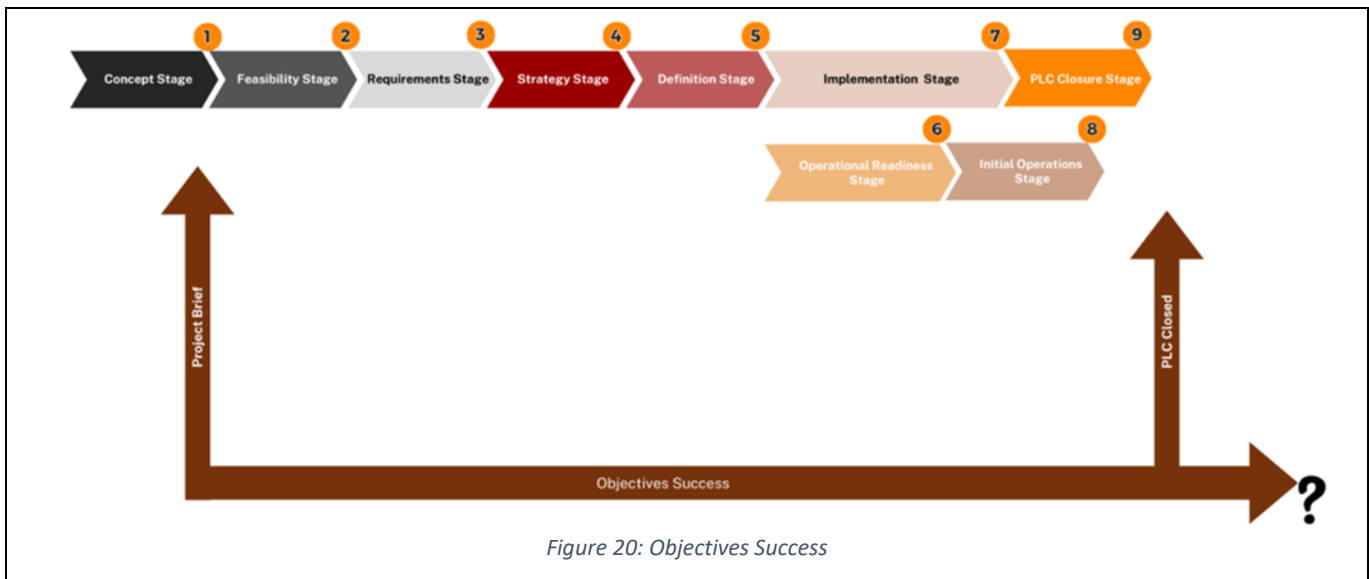
Product Delivery Success

- Product delivery success is the third dimension.
- It is about assessing the success of the delivery approach, which includes the first two dimensions and maybe other factors.
- The reference point is the project authorization document (project charter).
- Assessment is often not possible during PLC Closure. Therefore, it could happen sometime in the future.
- Please refer to Figure 19.



Objectives Success

- Objective success is the fourth and last dimension.
- It is about assessing the success of the project's objectives.
- The reference point is the project brief (business case).
- Assessment is not possible during PLC Closure. Therefore, it will happen sometime in the future, possibly long after the project is completed.
- Please refer to Figure 20.



Success Criteria

- The success criteria are the qualitative and quantitative targets the team can use to assess success.
- The criteria must cover all four dimensions.
- Criteria must be established early in the project life cycle, before final approval and the delivery phase.

18. Quality Management

Quality Management

- Quality management is about managing quality on a project or program.
- Quality can be a huge topic in some sectors, like capital projects.

Quality

- Quality is about compliance with a standard or specifications.
- The idea is that every project or its components must comply with a given standard, design, or specification.
- We often view quality as binary; we comply or do not.
- However, it is common to say high or low quality, which is erroneous and an indication of confusion between quality and grade.

Grade

- Grade refers to a category or rank given to products or services with the same functional use but that differ in technical characteristics.
- It's a way to differentiate between items based on features that may be desirable to the customer but not necessarily related to the product's quality.
- For example, a high-grade product may have additional features or be made with better materials. In contrast, a lower-grade product has fewer features or is made with lesser-quality materials.
- Therefore, a team would set the grade for a product or service, which could be a low grade. If the team delivers to that standard, we say quality is achieved.
- *Example of Grade: A hotel rating system using a star system.*

Defect

- A defect results from a product deviating from the design or specification.
- It should be noted that a defect must be repaired, reworked, or scrapped and replaced.



Cost of Quality

- Cost of quality is a technique to determine the optimal balance between prevention and corrective actions.
- The formula is provided below but requires clarification; see the other definitions.
- *Formula: Cost of Quality = Cost of Conformance + the Cost of Non-Conformance*

Cost of Conformance

- In quality, the cost of conformance is about the cost spent to be preventive.
- It usually includes the cost of improving the processes, systems, training, etc., to ensure quality.

Cost of Non-Conformance

- The cost of non-conformance is the money spent if quality is not achieved.
- This would include the cost of rework, scrap, etc.

Exception Item

- An exception is an item that is incomplete at handover.
- However, these items do not affect the product's operation.
- Therefore, the operations team might grant the implementation team provisional acceptance.
- This provisional acceptance is on the condition that these exception items will be resolved before closing implementation and final acceptance.

Exception Items List

- A list of all the exception items.
- An alternative term could be a snag list.
- It is an output of the handover stage gate that includes all items that are still incomplete but do not affect the handover or operations.

Snag List

- See the exception items list

Inspection

- Inspection checks and reviews work to verify if it complies with the standards or specifications.



Non-Conformance Report (NCR)

- A non-conformance report is issued by an inspection or review team when they find a defect or an item that does not comply with the standard or specification.

19. Sustainability Management

P5™

- People-Planet-Prosperity-Product-Process; this is from Green Project Management.
- The P5™ Standard is a robust framework for sustainable project management.
- It is a beacon for organizations seeking to embed sustainable practices into their project management processes.

P5 Impact Assessment

- This is a model for assessing the impact of the project or initiative in line with the P5.

Sustainability Management Plan (SMP)

- The sustainability management plan is another reference from Green Project Management.
- It is practical to include sustainability considerations while planning a project.

Sustainability Development Goals (SDGs)

- The Sustainable Development Goals (SDGs) are also known as the Global Goals.
- They were adopted by the United Nations in 2015. They serve as a universal call to action, aiming to achieve a certain level of these goals by 2030.

F. Miscellaneous Terms²⁵

Three Pillars of Successful Management (People, Processes, and Technology — PPT)

- The three pillars an organization must build for consistent value delivery: People (competence, leadership, culture), Processes (governance, policies, methods, systems — the OPMS), and Technology (tools, platforms, digital enablers).
- The PMU is responsible for all three. The People System owns the people pillar; the OPMS owns the processes pillar; the technology pillar is mostly tied to processes.

²⁵ These are terms that do not fit perfectly into any other group or common between more than one group.



- Referred to throughout the series as PPT.
- Reference: Strategy to Results, Book 1, Vision Realized!, with Book 2 building OPMS and the People System as its operational expression, and Books 3 and 4 returning to PPT as a recurring lens.

Acceptance

- Acceptance on its own does not provide the proper context.
- However, in most contexts, it is about accepting “something,” like a deliverable, an increment, or the entire product.

Acceptance Criteria

- Acceptance Criteria outline the conditions for accepting that “something.”

Assumption

- Assumptions are used in project management when we do not have enough information and cannot wait to find out.
- Therefore, we make assumptions to proceed with the work because we will revisit these assumptions when it is possible to resolve them.
- If we do not resolve these assumptions when necessary, they become risks.
- *Example: We assume we will get the permit on or before the required date.*

Constraints

- Constraints are strict conditions that affect the team’s ability to work freely.
- The constraint could be time, money, resources, or other conditions.
- These are usually mandated by management, nature, or other conditions.
- *Examples: The team cannot construct at night in a neighborhood. The new school building must be completed before the start of the next school year.*

Triple Constraints

- Triple Constraints is an established project management framework of scope, time, and cost.
- Also known as the Iron Triangle, a term the Uruk Framework considers a faulty concept.
- Reference: Strategy to Results, Book 4, Delivering Value.

Beneficial Use

- The term beneficial use refers to the period after product handover and when the owner starts receiving benefits.



Business Case

- The business case is the justification for the project.
- It indicates that the project (and its product) is of value to the organization.

Project Charter

- A project charter is a document that authorizes a project.
- In Uruk, we use it for micro and small, simple projects.

Baseline

- A baseline is a point of reference generated with the approved plan.
- Typically, during the delivery phase, the team will assess performance compared to the baseline and determine whether the project is progressing per plan, lagging, or ahead.
- In Uruk, we promote the idea of a moving baseline, which we call the Four Control Reference Points.

Rebaseline

- A rebaseline is an arbitrary change to a formal baseline, often made because of poor performance.
- Rebaselining because the original baseline is no longer achievable, without a corresponding change in scope, is not a management tool, it is an admission that the project was never in control.
- This is explicitly distinct from the Moving Baseline/Four Control Reference Points, which is a planned, progressive refinement of the baseline as the project advances through stages, not an arbitrary reset.
- Reference: Strategy to Results, Book 4, Delivering Value.

Moving Baseline

- See the Four Control Reference Points.

Deviation

- A deviation, also known as a variance, is a deviation from the plan, positive or negative.
- A deviation occurs due to variance in the work, such as lower or higher productivity, lower or higher material costs, etc.
- This differs from change or scope creep since those are conscious decisions to change the plan.



Corrective Action

- A corrective action is an action the team takes to correct for a deviation or lower-than-planned performance.

Preventive Action

- A preventive action is the team's proactive action to avoid deviating from the plan.

Deliverable

- In the project management context, a deliverable is any tangible item we need to produce.
- The deliverable could be a study, a document, or a physical product.
- Since the term could mean many things, we will avoid using "deliverable" independently.
- In Stratija, we have two categories of deliverables: stage and process.

Issue

- An issue is anything that the team needs to resolve.
- It could be a request for information or clarification, a problem, an idea, etc.
- We prefer to separate issues from tasks, and Stratija has a dedicated module for each.
- An issue could be resolved with no further action. Alternatively, it could lead to a task or a change.

Task

- A task is work to be done.
- It could be an activity (schedule) or a work package (scope).
- In Uruk, a work package could be equivalent to a task. However, the default is that a work package could consist of many tasks.

Outcome

- Outcome is related to results or benefits that should be generated from the capabilities that the project will create.
- *Example: The outcome of the new software tool is increased productivity.*

Output

- Output is a deliverable, the output of a process or action.
- The output of a stage is a stage deliverable.
- The output of the project is the product that the project is delivering.



- *Example: a software tool, a clinic, a book.*

Plan-Do-Check-Act (PDCA)

- Plan-Do-Check-Act is a concept used in association with processes.
- The idea is that we should plan our work and then do it according to plan.
- However, since deviations and changes are likely to occur, we must check (monitor) if things are going as planned or deviating.
- Finally, the team must take corrective action (act) if deviating.
- It is also possible to take preventive action to prevent or minimize deviations.

Post-Mortem

- A post-mortem is one of those morbid terms that some practitioners use.
- It is about the analysis and reviews performed after completing the project to understand what happened, especially if things do not go well.
- We prefer post-project review or reconciliation.

Post-Project Review

- A post-project review is an exercise that the organization conducts at the end of a project to understand what happened between the plan and the final situation.
- It is to identify any deviations or changes not captured earlier, positive or negative trends, etc.
- This exercise could include capturing lessons the team might have missed earlier.
- A related term we use is reconciliation, one of the process steps in the PLC Closure Stage.

Useful Life

- Useful Life is a term used to describe the life of an asset, where the asset is functional and contributing to the owner's operations.
- The term is often linked to asset depreciation for tax purposes.
- *Examples: Useful life of facilities, equipment, electronics, etc.*

Value Engineering

- Value engineering is a systematic technique that aims to increase the value of something.
- Usually, it is about substituting materials or other things with similar functional uses but offering higher value.
- The higher value could come from a longer helpful life or a lower cost of the alternative materials.



- Some organizations treat this as a cost-reduction exercise. However, a cost-reduction exercise aims to reduce costs, not necessarily increase value.

Value Management

- See value engineering.

War Room

- War room is a space where the project team gathers to plan and collaborate.
- It could be a conference room dedicated to the team with boards, charts on the wall, etc.



Sec III. Sectors/Domains Specialized Terms

This part includes project management terms that might be unique within a sector or domain. Some of these terms relate to Stratija-tailored methods, but should also be generic.

A. General Terms

Sector

- A sector is the highest-level categorization of projects.
- We use it to help group similar types of projects.
- The primary sectors include academic, capital industries, technology, medical, etc.

Domain

- For some sectors, it helps to subdivide them into domains to narrow the type.
- For example, capital industries, including petroleum, infrastructure, renewable energy, etc.

B. Academic Projects

Capstone Project

- A capstone project is a multifaceted academic experience typically required for students during the final year of an educational program.
- These are often required for graduation.
- It is an opportunity for students to practice what they have learned on real or realistic projects.

C. Capital Projects

Capital-Intensive Project (CIP)

- See capital projects



Capital Project

- A capital project is typically a project that leads to building a facility and requires a large investment.
- These are also called Construction Projects or Capital-Intensive Projects.

Construction Project

- The construction project term is ambiguous and could mean one of two things.
- A capital project (defined elsewhere).
- The construction phase of a capital project.

Megaproject

- A Megaproject is a project of extraordinary scale, typically costing more than one billion dollars.
- Megaprojects are characterized by high complexity, long duration, significant stakeholder numbers, and unique risk dynamics, including risk aggregation, cascading risks, and interface risks.
- Reference: Strategy to Results, Book 4, Delivering Value, and Leading a Megaproject: A Tailored Approach.

Giga Project

- A Giga Project is a project or program of extreme scale, typically costing more than ten billion dollars.
- Giga Projects often exceed the scope of a single Megaproject and may be structured as a program of multiple interrelated Megaprojects, frequently with national or multinational strategic significance.
- The complexity, risk dynamics, and governance demands of a Megaproject are present at an even greater scale, often requiring dedicated national or multi-organizational governance structures rather than a single sponsoring organization.
- Reference: Strategy to Results, Book 4, Delivering Value.

Long Lead

- A long lead is a term we often use when making purchases.
- It is for things that will take a long time to deliver after the purchase or contract award.
- It is common in the capital projects sector.
- Consequently, organizations might order these items sooner than the ideal time based on preliminary design data (increasing risks).
- *Example: On some projects, we might need a machine (pump, compressor) or industrial equipment (reactor, vessel) with a long cycle time from design to delivery. The lengthy cycle time would be*



longer than the project can absorb without delaying the project if one follows the logical sequence. Therefore, organizations might be willing to take a risk and place the order for these long lead purchases using preliminary design information, even before final funding (approval). This practice increases the risks to the parties involved. This is a form of accepting risks to accelerate work (fast-tracking).

Discipline

- In engineering, discipline refers to an engineering field, like electrical or mechanical discipline.

Front End

- The front-end term refers to the early stages of a project's life cycle.
- It is a common term in the capital projects sector.
- It refers to the stages before the final investment decision (final approval).
- This phase includes business case, selection, framing, feasibility, basic design, management planning, and preliminary engineering (FEED).
- In the Uruk Value Delivery Methodology, the Front End is equivalent to the Discovery and Development Phases.
- Please refer to Figure 21.

Execution Phase

- Execution is a common term for the implementation work, including engineering, construction, pre-commissioning, and startup.
- In the Uruk Value Delivery Methodology, the execution phase is equivalent to the implementation and PLC closure stages, not the entire Uruk Delivery Phase.
- Since the execution phase is about building the product, typically by a contractor, it excludes the operational readiness and initial operations stages.
- Therefore, the Uruk delivery phase includes the “execution” and operation-related stages.

Front End Loading (FEL)

- Front-end loading (FEL) is about the project development in the early stages.
- It often includes feasibility analysis, conceptual planning, programming/schematic design, and early project planning.
- It is the process for conceptual development of projects in processing industries such as upstream oil and gas, petrochemical, natural gas refining, extractive metallurgy, waste-to-energy, and pharmaceuticals.

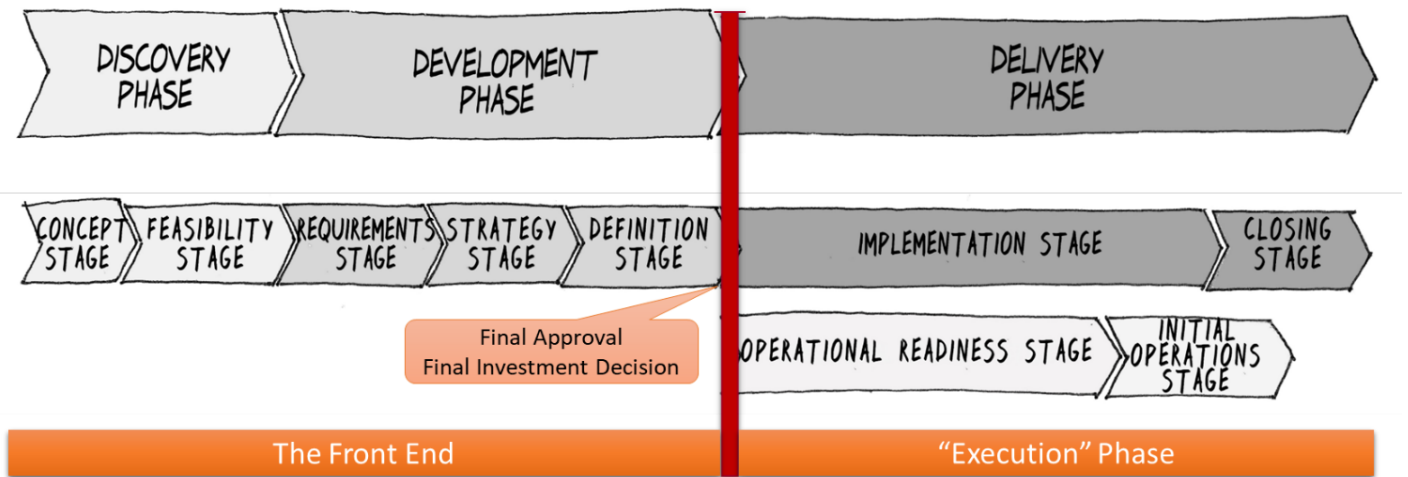


Figure 21: A Project Life Cycle Highlighting the Front End in Comparison to the Uruk Methodology

FEL Index

- The front-end loading index is a quantitative measure to assess the level of development of the project's front end.
- It is a term developed by Independent Project Analysis (IPA).
- It assesses the quality of project definition at various stages, from conceptual design to completion of front-end deliverables before final approval.

Project Definition Rating Index (PDRI)

- The project definition rating index is used in capital projects and developed by the Construction Industry Institute (CII).
- It provides a structured approach to assess the degree of project definition during the front end (development phase in Uruk).
- It is like the front-end loading (FEL) index used by the Independent Project Analysis company. Both use a scoring system to assess the level of development.
- Some organizations use PDRI to look for a specific score before they accept that the project is ready for final approval and funding and proceed into the Delivery Phase. If the score is not per their guidelines, they would require the team to perform more (project development) work.

Preliminary Engineering

- Preliminary engineering refers to the early engineering work for a project.
- It typically takes place before final approval and funding.
- It provides general guidance and requirements for detailed engineering.
- Typically, this is not detailed enough to use for construction.



- In the standard model of Stratija, this would be equivalent to the project's detailed plan.
- An alternative term for the process domains is FEED.
- Examples: For a building project, this might be equivalent to the architectural design that shows dimensions, elevations, etc. For a highway project, it is likely to show the routing, specifications, etc.

Front-End Engineering Design (FEED)

- See preliminary engineering.

Detailed Engineering

- Detailed engineering is the engineering design of the various project-engineered components.
- The product of this work would be drawings and specifications with the designation of Issued for Construction (IFC).
- The output also includes the specifications for equipment and other “gadgets” for purchasing.

Issued for Construction (IFC)

- Issued for construction refers to the engineering design packages, a product of detailed engineering, which are given to the construction team to start working on the next stage of development.

Best Practice (BP)

- The best practices term is misleading; we do not use it in Uruk.
- It implies that there are best practices, but the challenge is determining the best for whom or under what circumstances. What is best in one sector, organization, or condition might not be suitable in another setting.
- Some practitioners refer to the processes of the PMBOK® Guide as best practices, but that is misleading. The PMBOK® Guide refers to good practices.
- It is essential to mention that the Construction Industry Institute (CII) uses this term extensively. They have identified 17 Best Practices. In their context, a best practice would be a set of rules/guidance that, if implemented on projects, would result in performance improvement (cost, schedule).

Value Improving Practices (VIP)

- Value-improving practices are like what the Construction Industry Institute (CII) views as best practices.
- We believe this term originated with a company called Independent Project Analysis (IPA).



Advanced Work Packaging (AWP)

- Advanced work packaging (AWP) is a construction-driven planning and collaboration system for building capital projects.
- Its primary focus is creating a constraint-free work environment in the field.
- AWP requires that detailed work packages be created early in the project life cycle, i.e., in advance. Then, monitored across the entire life cycle from engineering to construction.

Toolbox Meeting

- Toolbox Meeting is a common term in construction, and it refers to the morning meeting that a construction crew would have to discuss the day before starting work.

D. Technology Projects

Scrum

- Scrum is a product development framework.
- It is usually common in software development.
- It emphasizes work in short cycles, called Sprints.

Sprint

- Sprint refers to a time-boxed period of work.
- It ensures work, typically product development, is completed in short increments.
- The Sprint duration is usually one week, but it could be longer.

E. NGO Projects

MEAL

- MEAL is a term used by PM4NGOs that refers to “Monitoring, Evaluation, Accountability, and Learning.”
- It is part of the DPro methodology.

Decision Gate

- PM4NGOs use a decision gate as an alternative to a stage gate.



Sec IV. Uruk Unique Terms

A. Uruk Framework Terms

Uruk Way

- The Uruk Way is a term we use to refer to the solutions that we developed through our project management innovation program.
- We replaced this term with the Uruk Framework.

Uruk Way Project Management Framework

- The Uruk Way Project Management Framework refers to the collective Uruk Way solutions.
- We replaced this term with the Uruk Framework.

The Uruk Framework

- The Uruk Framework is the revised name of the Uruk Way Project Management Framework.
- There are five distinct solutions, which we define in this document.
- These solutions are the Seven Elements of Project Management Maturity, the Value Delivery Methodology, the Four Dimensions of Project Success, the Four Control Reference Points, and the Six Steps of Performance Management.

Seven Elements of Project Management Maturity™ (7Es)

- The Seven Elements of Project Management Maturity is one of the Uruk Framework solutions.
- It focuses on general guides for building the organizational project management system to reach higher levels of project management maturity.
- The seven elements are value delivery methodology, methodology essential actions (supporting actions), tools and technology, leadership and professional development, knowledge management and organizational learning, governance and portfolio management, and strategic and organizational aspects.
- *Reference:* <https://urukpm.com/uruk-framework/>.

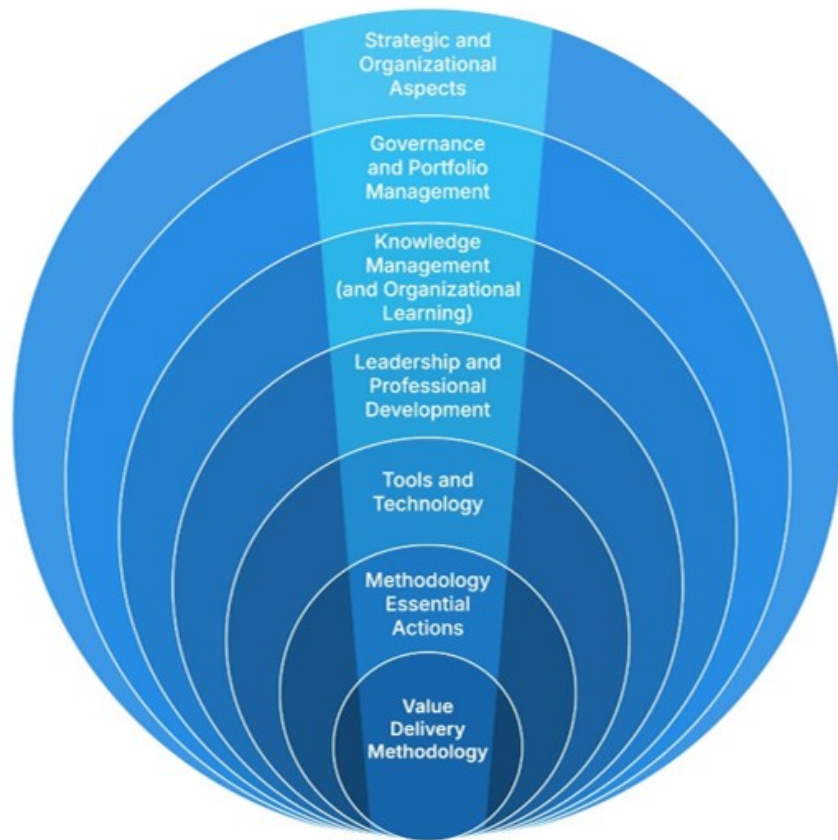


Figure 22: The Seven Elements of Project Management Maturity (7Es)

Value Delivery Methodology (VDM)™

- It is also part of the Uruk Framework Solutions.
- It is a methodological process for leading projects from ideation to operations, emphasizing value delivery.
- Mounir Ajam's book, Project Management Beyond Waterfall and Agile, is the primary reference for version 3 of the methodology.
- Subsequently, due to Stratija, Version 4 of the methodology is now the foundation for the project management element of Stratija.
- Reference: <https://urukpm.com/uruk-framework/>.

Four Dimensions of Project Success™ (4Ds)

- We define it elsewhere in this document
- Reference: <https://urukpm.com/uruk-framework/>.

The Value Delivery Methodology: Project Life Cycle

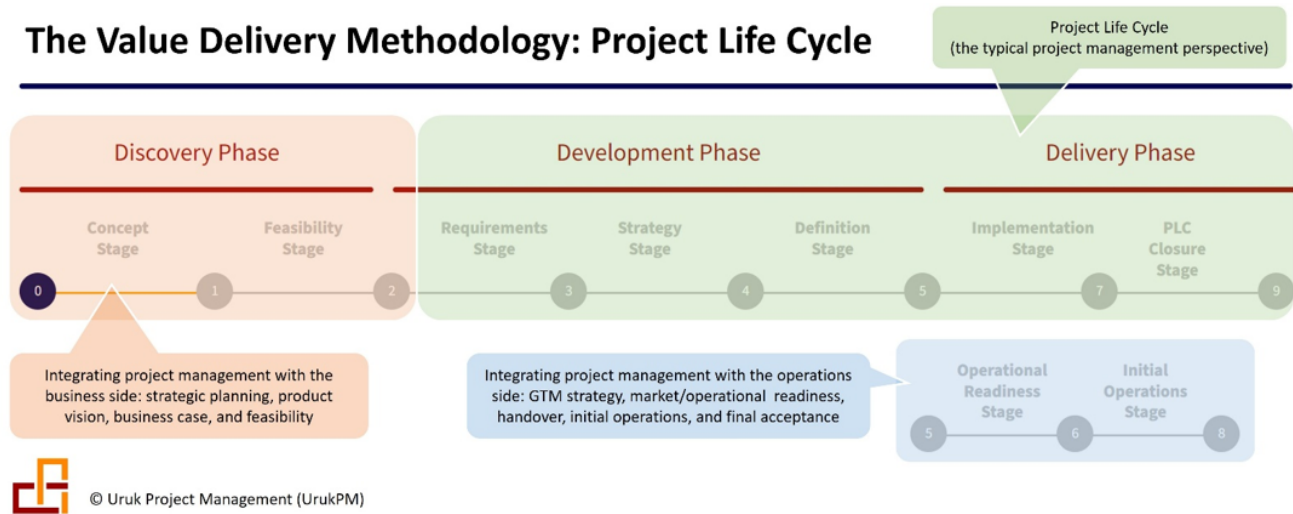


Figure 23: The Value Delivery Methodology

Four Control Reference Points™ (4Cs)

- This is one of the five Uruk Framework solutions.
- It offers a model for determining which point is the latest control reference, which we use to compare performance to that reference point.
- This model is essential for project governance and ensures that project control exists throughout the life cycle.
- The four points are: control in comparison to the project brief, control to project authorization, control to the project management plan, and control in comparison to the official baseline.
- Reference: <https://urukpm.com/uruk-framework/>.

Six Steps of Performance Management™

- This is one of the five Uruk Framework solutions.
- It offers a model for assessing the project's health and updating the forecast.
- The six steps are: define the baseline (what has to be done), know what has been achieved to date, understand what is left to be done, analyze performance versus plan, take corrective action and follow up, and forecast (revise the definition of what has to be done).
- Reference: <https://urukpm.com/uruk-framework/>.

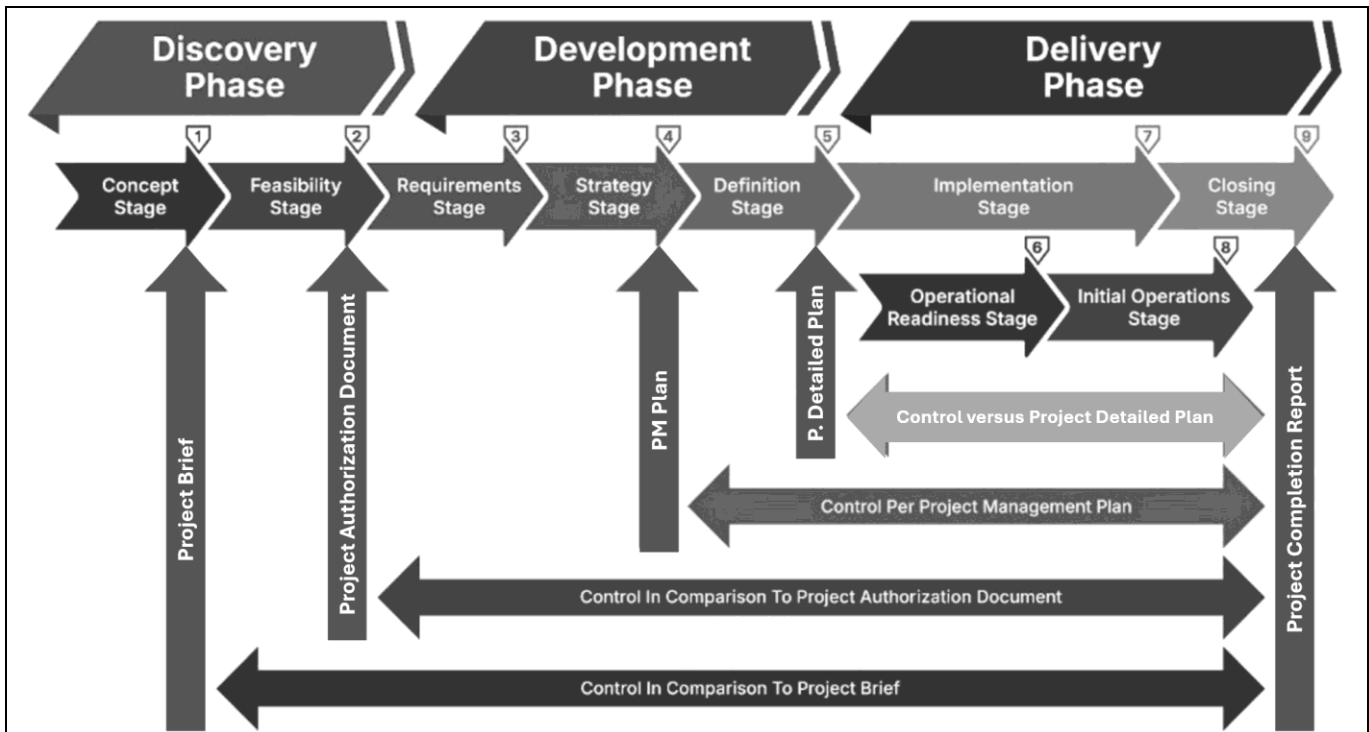


Figure 24: The Four Control Reference Points (4Cs)

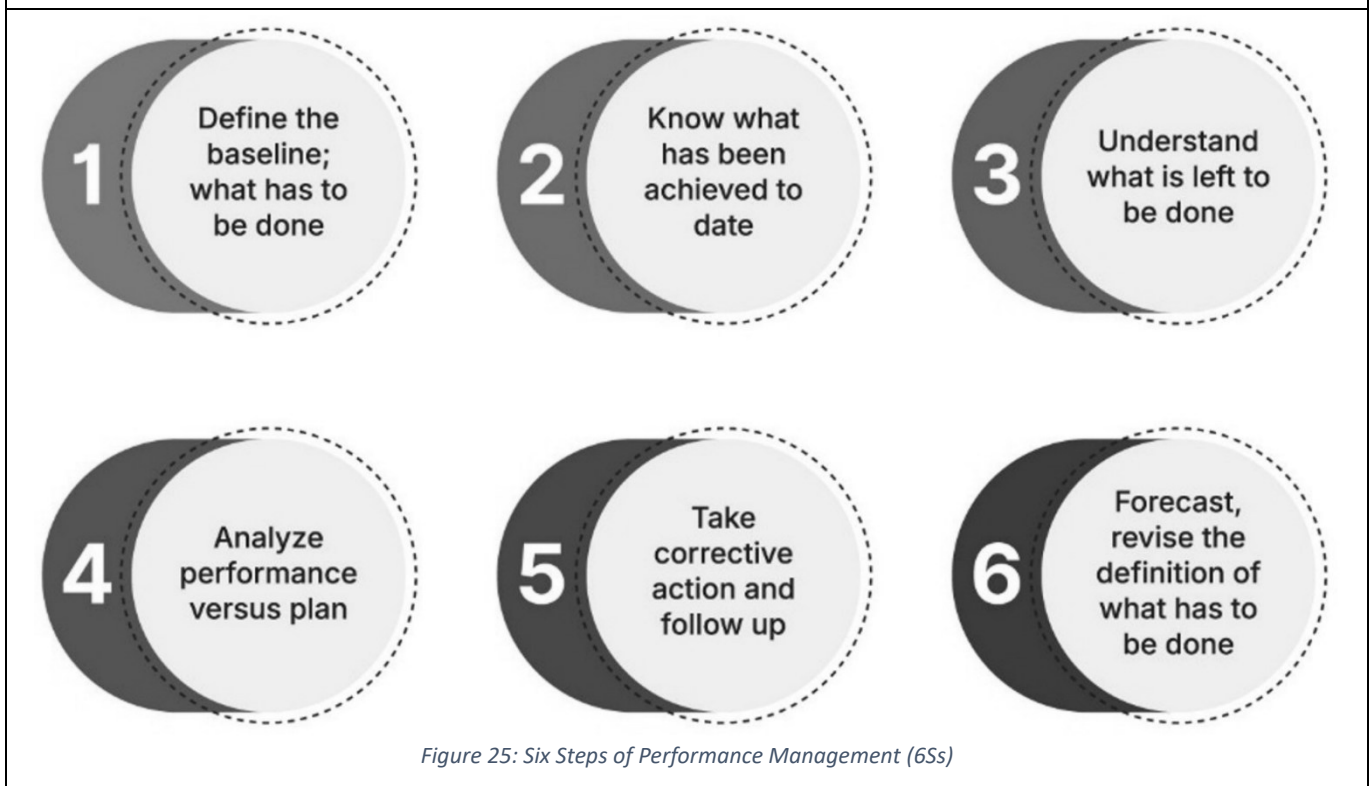


Figure 25: Six Steps of Performance Management (6Ss)

The PCA Model™



- PCA stands for Predetermine, Cultivate, and Assess/Achieve Success.
- It is a three-step governance model: predetermine success during Discovery, cultivate success through stage management across the life cycle, and assess/achieve success against the Four Dimensions of Project Success.
- Originally presented in Practical Governance and referenced throughout Delivering Value.
- Reference: Strategy to Results, Book 3, Practical Governance, and Book 4, Delivering Value.

National Project Authority (NPA)

- This is a term generated from a collaboration between Innavera²⁶ and Uruk.
- The intent is to promote the idea of an authority to manage the project management function for a certain country.
- It can be applied to a state or a province.
- This would be equivalent to a PMU within an organization.

National Project System (NPS)

- This is a term generated from a collaboration between Innavera and Uruk.
- The intent is to promote the idea of an authority building a national project management system.
- It can be applied to a state or a province.

National Project Management System (NPMS)

- This is a term generated from a collaboration between Innavera and Uruk.
- It is one of two subsystems of the NPS.
- It can be applied to a state or a province.
- This would be equivalent to an organizational project management system.

National People System (NPeS)

- This is a term generated from a collaboration between Innavera and Uruk.
- It is one of two subsystems of the NPS.
- It can be applied to a state or a province.
- This would be equivalent to an organization people's system.

²⁶ <https://innavera.com/>



B. Stratija Terms

In this part, we include the various terms we use in Stratija, which are unique and not covered elsewhere in this document.

1. General Terms

Integrated Organizational Solution (IOS)

- The vision for Stratija is to become an Integrated Organizational Solution, supporting the work from Strategy to Results.
- It includes integrated portfolio management elements and adds other elements that would expand the scope and reach of the platform.

Integrated Portfolio Management (IPM)

- Per Stratija's vision, the ultimate objective is to become an Integrated Organizational Solution.
- However, as an intermediate step, we are transforming the platform into an integrated portfolio management solution, including the 4PMs and supporting elements (Administrative and Community of Practice).

Stratija

- The software solution includes its elements and modules.
- It is an integrated, digital, versatile, and comprehensive solution.
- An MVP is expected by the end of September 2026.

Uruk Nexus™

- The Uruk Nexus is the architectural model at the center of Stratija.
- The Value Delivery Methodology sits at the core.
- Six sections connect to the core: Strategy Formulation, Portfolio Management, Product Management, Program Management, Project Management, and Supporting Actions.
- Surrounding and touching these elements is the People System.
- The next layer is Community and Support.
- Governance sits as an umbrella over the entire model.
- *Reference: Figure 27 and <https://urukpm.com/uruk-framework/>.*

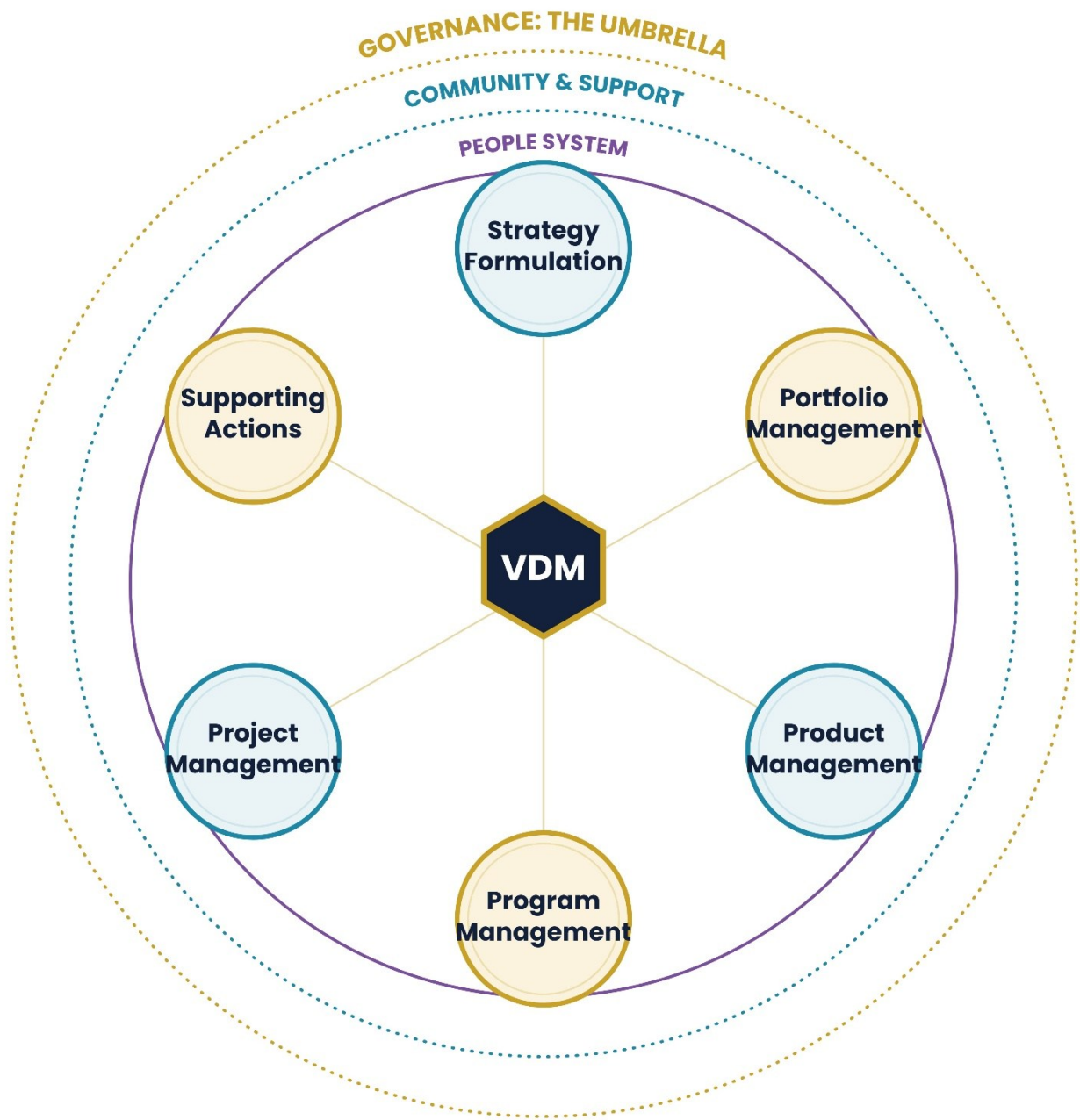


Figure 26: The Uruk Nexus of Stratija Software

Stratija Element

- An element is a significant section of Stratija, the highest level.
- Stratija vision is to have up to nine elements.
- Each element consists of many modules.



- These elements are as shown in Figure 27.

Stratija Module

- A module is a significant part of the methodology or other platform elements.
- In Stratija, we expect more than 60 modules.
- Each module could have one or more processes.

Stratija Process

- In Uruk, the term Uruk Process refers to specific actions within a platform module.
- These are different from the methodology processes.
- For example, the project set-up modules have five Uruk processes.

Supporting Actions

- Supporting Actions (we also call them tools) is an element of Stratija.
- There are about 20+ modules in this element.
- They are the actions/tools to help manage projects and programs.
- They include functions like PMI/ISO topics, such as scope, cost, and risk management.
- Also, they include other topics like funding, issues, tasks, and success.

Admin Panel (AP)

- This is the “control room” of the platform where the Platform Admin (also known as the Uruk Admin) can manage the various aspects of the platform.
- Here, the UrukPM consultants can develop new or modify existing tailored methods.
- They can also oversee technical support, populate the knowledge portal, and do many other tasks.

Organizational Unit (OU)

- Organizational Unit (OU) is a term we use in Stratija to refer to a department, division, branch, subsidiary, or any other name used in the organization.
- In line with the definition of an organization, an organizational unit is a “part” of a larger entity.
- Organizational units could also refer to units at different levels of hierarchy.

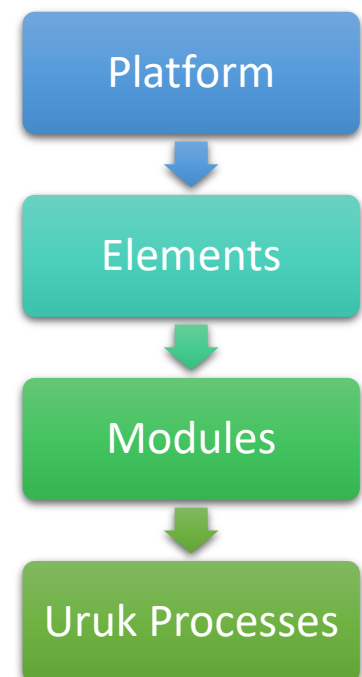


Figure 27: Stratija Hierarchy



- We are using this term generically since it could be a division, department, branch, subsidiary, etc.
- In Stratija, we allow up to three levels of organizational units. This is relevant for performance management and reporting since OU managers can manage their sub-portfolios at their respective levels.
- We use it to create sub-portfolios, which would be helpful in large organizations.
- The significance of this designation is that heads of organizational units would be able to manage and monitor their sub-portfolios.

Project Management Unit (PMU)

- Some organizations have project management offices (PMOs), and others have project management departments or divisions, so we use the term PMU, Project Management Unit, to refer to these units (PMO or PMD) generically.
- In Stratija, a PMU manages the portfolio.
- The mandate, staff, and roles of the PMU could vary greatly.

Single Source of Truth

- Single Source of Truth is a phrase we use to describe one of the essential benefits of Stratija.
- It refers to the fact that the Executive Dashboard, its performance charts, and other modules offer a real-time and transparent view of the entire 4PMs.

Community Forums

- Community Forums is a module within Stratija.
- It is part of the Community of Practice element.
- It provides a place for users to collaborate and discuss things.

Workspace

- Stratija term for a client account.
- It is the client workspace where all users access the various authorized functionalities.
- The Client Admin can manage some workspace settings, including adding and removing users, requesting additional licenses, and renewals.

2. System Roles

System Role

- System roles in Stratija typically have some privileges.
- They are different from the users' roles within the platform.



Super Admin

- The Super Admin is a Uruk manager who can manage the platform via the Admin Panel.
- We could have sub-roles here, where each sub-role would have certain privileges but not full access. This is necessary for security.

Uruk Admin

- See Super Admin

Uruk Coach

- The Uruk Coach has two meanings here.
- The first refers to the innovator behind Stratija and Uruk CEO, Mounir Ajam.
- The second usage is within the platform. Wherever we have something, an action, or a header to guide the users, we use a question mark icon with a Uruk Coach message (text and audio).

User

- A User role is a system designation for anyone conducting platform transactions.

Viewer

- A Viewer role is a system designation for anyone who can only view but not perform work on the platform.
- We have three categories of viewers: a project viewer, an organizational unit viewer, and an executive viewer.

Org Admin (OA)

- An Org Admin (OA) has a specific role on the client side.
- The OA has many privileges that regular users or viewers do not have.
- These privileges include various organizational settings that would apply to all Uruk Platform users/viewers for the given client.

Internal Knowledge Portal (IKP)

- An internal knowledge portal restricted to a specific workspace.

IKP Admin

- The IKP Admin has a specific role on the client side.
- The IKP Admin has some privileges that regular users or viewers do not have.



- These privileges are limited to the Internal Knowledge Portal module.
- The one with this designation could also be a regular user (team member, project manager, etc.).

Captured Lessons Learned Admin (CLL Admin)

- A Captured Lessons Learned Admin (CLL Admin) has a specific role on the client side.
- The CLL Admin has some privileges that regular users or viewers do not have.
- These privileges are limited to the Captured Lessons Learned module.
- The one with this designation could also be a regular user (team member, project manager, etc.).

3. Platform Roles

Platform Role

- A platform's role is for users with access to the platform.
- The authority and access privileges of the various roles are documented in the Permissions Matrix.

Project Sponsor

- The person designated as the project sponsor can activate projects and resolve the stage gate decisions.
- These actions include holding and reactivating a project, and can also terminate a project.

Program Sponsor

- Same as project sponsor but for the program level.

Program Manager

- Can lead a program and oversee its projects.

Project Manager

- Can lead a project with all the relevant actions.

Team Member, Generalist (TM-Gen)

- Currently, this is the default team member status.
- Anyone assigned to work on a project in any capacity.

Team Member, Functional/Technical (TM-FT)

- A TM-FT would be for those roles that would do technical work.
- These are engineers, developers, analysts, etc. The implementation team.



- Once we activate this functionality, it will be restrictive.

Team Member, Operations (TM-Ops)

- Operations team members represent the end users and are not directly involved in building the product.
- These critical roles in specific domains and project types would work in parallel with the implementation team.
- Once we activate this functionality, it will be restrictive.

Team Member, Project Management (TM-PM)

- Project Management team members are those with project management roles and would assist the project manager in managing the project.
- They include estimators, planners, schedulers, and other project management specialists.
- Once we activate this functionality, it will be restrictive.

4. Project Status

Project Status

- A field we use to define the status of the project.
- There are six status conditions: Future, Active, Completed, Closed, Hold, and Terminated.
- This is not about the project's performance; Project Performance Status is addressed separately.

Future Project

- A Future Project is a project that has been added to Stratija but has not been activated.
- The project will stay a future project until a senior manager (a project sponsor) activates it.
- Consequently, no work has been done on the project besides including it in the list.

Active Project

- An Active Project is a project that the project sponsor has activated.
- It authorizes the project manager and team to work on the project.

Hold Project

- Hold is a project status condition that we assign to a project to represent a project that has been active and was put on hold until a later date or indefinitely.
- Only a project sponsor can remove the hold and reactivate the project.

Completed Project

- A project that has reached the last stage gate on the PLC has been completed but not closed.



- The project will stay a completed project until the final success assessment.
- Consequently, the project team has completed the work and demobilized from the project.

Closed Project

- A project that has reached the endpoint and is formally closed.
- Per Stratija, a project will be designated complete (see Completed Project) after the handover and PLC closure, but it is still awaiting the final success assessment.
- The project will be formally closed after the final success assessment.

Terminated Project

- Terminated is a project status condition that we assign to a project to represent a project that has been active and was terminated or canceled.

C. Stratija Elements and Modules

We will provide this in a future edition of this guide.

Sec V. Strategy to Results Series Terms

A. General Terms

Strategy to Results

- This is a series of books that are currently being authored by Mounir A. Ajam and published by Uruk Project Management.
- The series consists of seven books: four are planned for publication before the end of 2026, and the other three are scheduled for 2027.

Six Core Principles of the Strategy to Results Series

- These six principles run through every volume in the series and reflect the framework's core convictions.
- Reference: Strategy to Results series, Book 4, Delivering Value.



Table 8: The Six Core Principles of Strategy to Results

No	Principle
1	Project management is a core organizational function — requiring leadership, ownership, and investment, not a support activity to be delegated.
2	Governance is the backbone of decision-making — not an administrative burden.
3	Methodology must be adaptive and tailored — responsive to change and designed for context, not dogmatic.
4	Value delivery requires integration — across strategy, operations, and delivery, not fragmentation.
5	Organizational success must be predetermined, cultivated, and assessed — not accidental.
6	Organizational capability requires the integration of People, Processes, and Technology — no single pillar is sufficient.

Five Dimensions of Value

- The five dimensions used to assess and measure the value a project or program delivers: Financial, Strategic, Operational, Human, and Regenerative.
- This is distinct from the Four Dimensions of Project Success, which assesses whether a project succeeded, not the dimensions of value itself.
- Financial value covers revenue, cost savings, and ROI. Strategic value covers competitive positioning and capability. Operational value covers efficiency, reliability, and quality. Human value covers well-being, engagement, and stakeholder satisfaction. Regenerative value covers environmental and social sustainability.
- The GPM P5™ Standard is referenced as a practical framework for assessing the regenerative dimension specifically.
- Reference: Strategy to Results, Book 4, Delivering Value.

Vision to Value (V2V)

- Vision to Value is the concept that projects and programs should bridge the gap from strategic vision to tangible value realization.
- This is one of the two core principles of the Value Delivery Methodology.
- Reference: Strategy to Results, Book 4, Delivering Value.

Value

- Value is the net, realized benefits identified before project authorization — not the project's output, but its outcome.
- Value = achieved outcomes, not delivered deliverables.
- It reflects the strategic, operational, and performance contribution of a change initiative: the benefits, adoption, impact, and alignment with organizational purpose.
- Reference: Strategy to Results, Book 3, Practical Governance.



Project System

- The Project System is the Uruk Framework way of viewing projects as investments; therefore, they are part of a system.
- VDM views the project system as consisting of two zones: the PLC Zone and the Operations Zone.
- These two zones are relevant to project success since, during the PLC Zone, we can only assess Technical Success and Project Management Success.
- The other two success dimensions: Product Delivery Success and Objectives Success require a period of time post-completion to be able to assess.

The Hidden Battle

- The Hidden Battle is the self-reinforcing conflict between PMOs (or project management functions) and executives, in which each side blames the other while the actual cause is structural, not personal.
- PMOs fight to justify their existence and prove their value; executives view project management as a cost center or administrative overhead rather than a strategic capability. Neither framing resolves the underlying structural problem.
- This dynamic is systemic and self-perpetuating until the organization addresses it structurally, e.g., through a properly formalized Project Management Function and Unit.
- Reference: Strategy to Results, Book 1, Vision Realized!

B. Organizational

Organizational Memory

- Organizational Memory is the discipline of capturing, analyzing, and embedding lessons from project experience so the organization improves with every project it delivers — the mechanism by which project-level learning becomes organizational capability.
- It is not a standalone discipline; it is part of the People System's Knowledge Management element.
- Lessons captured but never applied are not organizational memory — they are documentation.
- See also: Captured Lesson, Lesson Learned.
- Reference: Strategy to Results, Book 4, Delivering Value.

Structural Readiness

- Structural readiness is one of two dimensions used to assess an organization's readiness to apply the VDM (or any other transformative change).



- It addresses organizational infrastructure: whether a Project Management Function and PMU exist, whether an OPMS and People System are established, and whether roles are clearly defined and staffed.
- Reference: Strategy to Results, Book 4, Delivering Value.

Cultural Readiness

- Cultural readiness is the second dimension used to assess an organization's readiness to apply the VDM (or any other transformative change).
- It addresses mindset and behavior: leadership belief in project management's strategic value, honesty in performance reporting, openness to change, and willingness to invest in capability building.
- Reference: Strategy to Results, Book 4, Delivering Value.

Wet Towel Analogy

- An analogy illustrating that squeezing a wet towel harder yields diminishing returns — shaking or wringing removes some water, but the towel stays damp. A fundamentally different approach (a dryer) is needed for a real change in outcome.
- Used to argue that organizations facing chronic underperformance need structural change (a real project management function and system), not more effort within the existing broken approach.
- Reference: Strategy to Results, Book 1, Vision Realized!

Rubber Band Analogy

- An analogy illustrating organizational stretch goals: a rubber band shows flexibility and resilience when stretched appropriately, but overstretching causes it to snap, and too little tension leads to complacency.
- Used to argue for setting ambitious but achievable goals during transformation and change initiatives.
- Reference: Strategy to Results, Book 2, Successful Transformation, and Book 3, Practical Governance.

Formal Function

- A formal function is an organizational function recognized in the organizational system, hierarchy, and governance, established by the board of directors or organizational leadership.
- Examples include HR, IT, and Finance.



Core Organizational Function

- A core organizational function is a formal function (see Formal Function) with one added emphasis: it signals that project management should be treated as a primary, strategic function, not a secondary or administrative one.
- We use "core" deliberately to argue against the common practice of treating project management as a support activity rather than a function with the same standing as HR, IT, or Finance.

Profit Center (PMU as a Profit Center)

- A proposed alternative to treating the PMU as a cost center, which forces the function to continuously justify its existence and value.
- A profit center is a branch or division of a company treated as a separate unit for calculating profitability, responsible for its own revenues and expenses.
- Applied to a PMU, the concept reframes the unit as an essential, value-generating part of the organization rather than an uncertain overhead cost — even though a PMU doesn't sell anything in the traditional sense.
- The author doesn't claim to have originated the concept and notes the label itself is imperfect (alternatives like "revenue center" or "business unit" aren't better) — the point is the underlying shift in mindset, not the specific name.
- Reference: Strategy to Results, Book 2, Successful Transformation.

PMO Continuum

- The PMO Continuum is a model describing the range of functions and roles a PMO can take on within an organization, from a simplified starting entity to a broader strategic mandate.
- The levels include Passive Reporting, Active Reporting, Training Support, Career Management, Project Coordination, Project Management System, Managing Projects and Programs, and Strategic Project Management.
- Not all PMOs include every level, and organizations don't necessarily progress through them in strict sequence.
- Reference: Strategy to Results, Book 1, Vision Realized!

C. People-Related

People System

- The People System is one of the systems that, together with the OPMS, supports consistent value delivery.



- It covers competence profiles, capability development, and career management for every role defined in the methodology.
- Books 2 and 3 of the Strategy to Results series address the People System's architecture and principles in depth; Book 4 addresses its integration with the methodology.
- Reference: Strategy to Results, Books 2 and 3.

Projectification

- Projectification is the degree to which an organization's workforce is engaged in project work.
- Studies show significant variation by country (e.g., 34.7% in Germany, 32.6% in Norway).
- Reference: Strategy to Results, Book 4, Delivering Value.

Dual Ladders

- Dual Ladders is a career development model offering both a management ladder and a professional ladder, allowing technical experts to advance in their domain without moving into management.
- Also known as the two-track model.
- Reference: Strategy to Results, Book 4, Delivering Value.

D. Delivery & Performance

Extended Program Approach

- The Extended Program Approach is a program management approach that emphasizes building systems gradually over one or more years rather than an intensive short-term style.
- This approach minimizes resistance to change and allows for gradual assimilation.
- Reference: Strategy to Results, Book 4, Delivering Value.

Delivery System

- The Delivery System is another name for the Value Delivery Methodology, used when describing it as one of three integrated systems alongside the OPMS and the People System.
- Reference: Strategy to Results, Book 4, Delivering Value.

Cycle of Doom

- The Cycle of Doom is a recurring pattern of project failure, blame, and lost trust that organizations experience when they lack a formal project management function.
- Reference: Strategy to Results, Book 4, Delivering Value.

Look-Ahead Plan

- A Look-Ahead Plan is a short-term plan (1–4 weeks) that provides detailed planning for the immediate work period within a stage.
- Used in Rolling Wave Planning.
- Reference: Strategy to Results, Book 4, Delivering Value.

Horizontal Integration

- Horizontal Integration is integration across the project life cycle, linking project management with the rest of the organizational functions from ideation to operation.
- Reference: Strategy to Results, Book 4, Delivering Value.

Vertical Integration

- Vertical Integration is real-time integration between projects, programs, and portfolio management, enabling coordination, collaboration, and transparency.
- It also refers to integrating project work with organizational strategy.
- Reference: Strategy to Results, Book 4, Delivering Value.

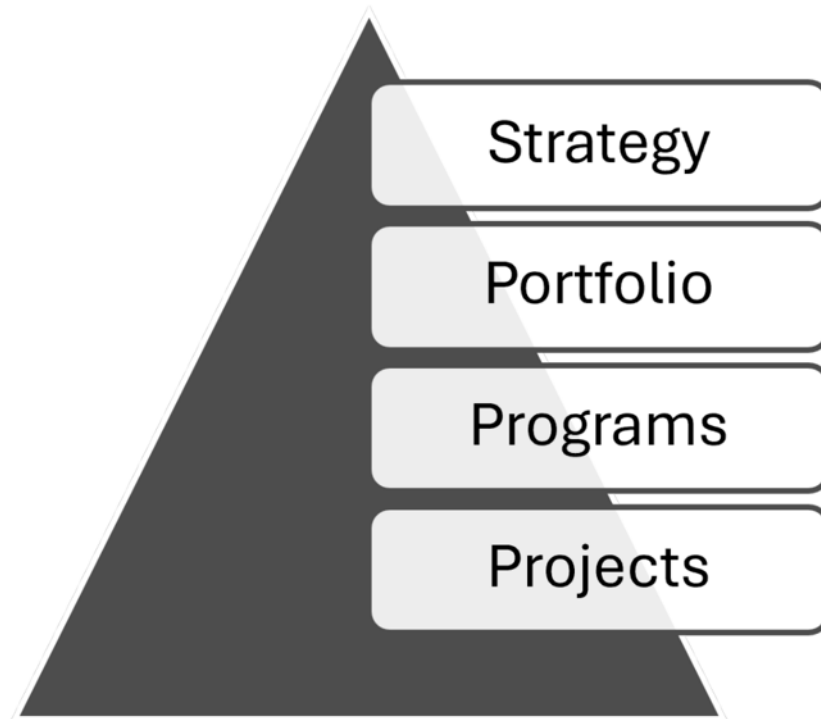


Figure 28: Vertical Integration



System Thinking

- System Thinking is a mindset that considers the various components of a system and their inter-connections, rather than treating them in isolation.
- Reference: Strategy to Results, Book 4, Delivering Value.

Integrated Delivery

- Integrated Delivery is the execution of programs and projects by a central unit within the Project Management Unit, housing career project management personnel.
- Reference: Strategy to Results, Book 4, Delivering Value.

The Five Inhibitors (to Project Performance)

- The Five Inhibitors are the five systemic, root-cause barriers that consistently undermine organizational project performance, regardless of industry, size, or complexity.
- They are: (1) Divergent Opinions, (2) Confusion About Project Management Methods, (3) Lack of Organizational Acceptance, (4) Organizational Divides, and (5) Absence of Organizational Project Management.
- They describe organizational-level, systemic barriers — not the causes of any single project's failure.
- Reference: Strategy to Results, Book 1, Vision Realized!

Cost of Quality (CoQ)

- Cost of Quality = Cost to Conform + Cost of Non-Conformance.
- Cost to conform is preventive spending (e.g., training, system-building) that reduces failure. Cost of non-conformance is the cost of scrap, rework, and errors when conformance fails.
- This is a standard quality management concept, extended in the Uruk Framework to project management (see Cost of Project Management).
- Reference: Strategy to Results, Book 2, Successful Transformation, and Book 4, Delivering Value.

Cost of Project Management (CoPM)

- Cost of Project Management = Cost to Conform + Cost of Non-Conformance, the same formula used for Cost of Quality, applied to project management.
- Cost to conform is the investment in building the OPM System, training people, and other preventive actions that increase project success and reduce failure.
- Cost of non-conformance is the cost of underperformance and lost value: financial, strategic, operational, and human, compounding across the organization over time.



- Used to justify the PMU as an investment rather than an overhead cost, directly connecting to the Profit Center argument in Book 2.
- Reference: Strategy to Results, Book 2, Successful Transformation, and Book 4, Delivering Value.

Appendices

A. Common Acronyms & Abbreviations

Many project management terms (phrases) could have the same acronyms. For example, “PM” could mean ten different things. Therefore, when writing any document or reference, we must always use the full term first, then use the acronyms in line with the context of that reference section.

Abbv	Full Term
3PM	Project, Program, and Portfolio Management
4PM	Project, Program, Product, and Portfolio Management
AACE	Association for the Advancement of Cost Engineers
AC	Actual Cost
ACCI	Absolute Change Cost Impact
ACCII	Absolute Change Cost Impact Index
ACWP	Actual Cost of Work Performed
AP	Academic Project(s)
AP	Admin Panel
AP	Approved Plan
AWP	Advanced Work Packaging
BAC	Budget at Completion
BBD	Big Bang Development (see Sequential Development)
BCWP	Budgeted Cost of Work Performed
BCWS	Budgeted Cost of Work Scheduled
BIPM	Business-Integrated Project Management
BoK	Body of Knowledge
BP	Best Practice(s)
CAMMP	The Customizable and Adaptable Methodology for Managing Projects™
CAPEX	Capital Expenditure
CCB	Change Control Board
CCI	Change Cost Impact
CCII	Change Cost Impact Index
CDI	Change Duration Impact
CDII	Change Duration Impact Index
CDO	Chief Development Officer
CFO	Chief Financial Officer
CII	Construction Industry Institute
CIO	Chief Information Officer
CIP	Capital-Intensive Project

Abbv	Full Term
CL	Captured Lesson
CLL	Captured Lesson Learned
CMO	Chief Marketing Officer
COO	Chief Operating Officer
CoPM	Cost of Project Management
CoQ	Cost of Quality
CP	Capital Project(s)
CPI	Cost Performance Index
CPM	Critical Path Method
CPMO	Chief Project Management Officer
cPMO	Corporate Project Management Office
CPO	Chief Project Officer
CSO	Chief Strategy Officer
CTO	Chief Technology Officer
CV	Cost Variance
DPro	Development Professional
EAC	Estimate at Completion
EMV	Expected Monetary Value
EPT	Extended Project Team
ETC	Estimate to Complete
EV	Earned Value
EVA	Earned Value Analysis
EVM	Earned Value Management
FE	Front End
FEED	Front-End Engineering Design
FEL	Front-End Loading
FID	Final Investment Decision
FSR	Feasibility Study Report
GP	General Project(s)
IFC	Issued for Construction
IOS	Initial Operations Summary
IOS	Integrated Organizational Solution
IPA	Independent Project Analysis
IPM	Integrated Portfolio Management
IPMA	International Project Management Association
KPI	Key Performance Indicator
LL	Lesson Learned
LOI	Letter of Intent
MEAL	Monitoring, Evaluation, Accountability, and Learning
MVP	Minimum Viable Product

Abbv	Full Term
NCR	Non-Conformance Report
NGO	Non-Governmental Organization
NPA	National Project Authority
NPeS	National People System
NPMS	National Project Management System
NPO	Non-Profit Organization
NPS	National Project System
NPV	Net Present Value
OCM	Organizational Change Management
OPEX	Operating Expenditure
OPM	Organizational Project Management
OPMM	Organizational Project Management Maturity
OPMS	Organizational Project Management System
ORS	Operational Readiness Summary
OU	Organizational Unit
P3M	Same as 3PM
PB	Project Brief
PBS	Product Breakdown Structure
PC	Project Charter
PC-A	Project Cost – Actual
PC-AP	Project Cost – Approved Plan
PCD-A	Project Completion Date – Actual
PCD-AP	Project Completion Date – Approved Plan
PCD-E	Project Completion Date – Estimate
PCD-F	Project Completion Date – Forecast
PCD-T	Project Completion Date – Target
PCDV	Project Completion Date Variance
PC-E	Project Cost – Estimate
PC-F	Project Cost – Forecast
PCI	Project Cost Index
PCM	Project Change Management
PCOR	Project Close-Out Report
PCR	Project Completion Report
PD-A	Project Duration – Actual
PD-AP	Project Duration – Approved Plan
PDCA	Plan-Do-Check-Act
PD-E	Project Duration – Estimate
PD-F	Project Duration – Forecast
PDI	Project Duration Index
PDP	Project Detailed Plan

Abbv	Full Term
PDRI	Project Definition Rating Index
PLC	Product Life Cycle
PLC	Program Life Cycle
PLC	Project Life Cycle
PM	Portfolio Management Portfolio Manager
PM	Product Management Product Manager
PM	Program Management Program Manager
PM	Project Management Project Manager
PM4NGOs	Project Management for NGOs
PMBok	Project Management Body of Knowledge ²⁷
PMC	Project Management Consultancy/Consultant
PMC	Project Management Cost
PMD	Project Management Division
PMF	Project Management Function
PMI®	Project Management Institute®
PMIS	Project Management Information System
PMM	Project Management Maturity
PMM	Project Management Method
PMM	Project Management Methodology
PMO	Project Management Office
PMP	Project Management Plan
PMS	Project Management System
PMT	Program Management Team
PMT	Project Management Team
PO	Purchase Order
POC	Proof of Concept
PP	Project Plan
PPT	People, Processes, and Technology
PRD	Project Requirements Document
PRINCE2	Projects in Controlled Environments
PRISM®	Projects Integrating Sustainable Methods
PSR	Project Status Report
PT	Program Team
PT	Project Team
PV	Planned Value
RFB	Request For Bid
RFI	Request For Information
RFP	Request For Proposal

²⁷ This is not the Guide to the Project Management Body of Knowledge (PMBOK® Guide)

Abbv	Full Term
ROI	Return on Investment
RWP	Rolling Wave Planning
SaaS	Software as a Service
SAD	Stage Authorization Document
SCOR	Stage Close-Out Report
SDG	Sustainability Development Goals
SDO	Startup Development Organization
SDP	Stage Detailed Plan
SL	Stage Leader
SMP	Stage Management Plan
SMP	Sustainability Management Plan
SOW	Scope of Work Statement of Work
SPI	Schedule Performance Index
SV	Schedule Variance
TCCI	Total Change Cost Impact
TCDI	Total Change Duration Impact
TM	Tailored Method
TM	Team Member
TMB	Tailored Method Builder
TMS	Tailored Method Selection
TPM	Technical Project Management
Uruk	Uruk is not an acronym; it is a city name in ancient Mesopotamia, which inspired our framework name.
V2V	Vision to Value
VDM	Value Delivery Methodology
VIP	Value Improving Practice(s)
WBS	Work Breakdown Structure
WP	Work Package

B. Professional Associations

These are some of the professional associations in the project management field. These associations publish relevant guides and standards.

- Green Project Management Global (GPM)
- International Association of Project Management (IPMA)
- Project Management Institute (PMI)
- PM4NGOs
- GAPPS



- Association for the Advancement of Cost Engineers (AACE)

C. Index

The index below lists every term defined in this guide, alphabetically, with the page number(s) where each is defined. Page numbers reflect this edition's layout; if content is added or removed later, they should be re-checked before final publication.

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About the Author



Mounir A. Ajam is a distinguished project management expert, author, advisor, and speaker. He is the Founder and CEO of Uruk Project Management.

With over three decades of extensive global experience, Mounir has worked across the capital projects sector, including engineering, construction, petroleum, utilities, project management, and management consulting. He has managed projects worth billions of dollars across North America, Europe, Southeast Asia, and West Asia. His portfolio includes small and large projects, as well as complex megaprojects in the United States and Southeast Asia.

Beyond capital projects, Mounir has led management consulting and training engagements for prominent organizations from East Africa to Southeast Asia. Most recently, he led a technology startup developing an integrated business solutions software, Stratija, a comprehensive, integrated business solution built on the same strategy-to-results premise as this series, delivered through governance and Business-Integrated Project Management.

Mounir is the author of several books, including:

- *Project Management Foundation (2013)*
- *Redefining the Basics of Project Management (2014)*
- *Applied Project Management (2015)*
- *Project Management Beyond Waterfall and Agile (2017)*
- *Leading Megaprojects: A Tailored Approach (2020)*

And now, this series, **Strategy to Results**, includes seven volumes:

2026 Release

- *Vision Realized!*
- *Successful Transformation*
- *Practical Governance*
- *Delivering Value*

2027 Release

- *Small Projects in Practice*
- *Complex Projects in Practice*
- *Program Leadership in Practice*



His work focuses on advancing project management methodologies and practices. He is known for his innovative Uruk Framework, the Value Delivery Methodology (formerly the Customizable and Adaptable Methodology for Managing Projects, or CAMMP™), and the Four Dimensions of Project Success. These frameworks are designed to help organizations bridge the gap between strategy and results.

In addition to his professional achievements, Mounir is deeply committed to community development and volunteer work. He actively supports global project management organizations and initiatives, contributing to his expertise to help build and sustain project management functions across sectors. Most recently, he contributed to the team reviewing PMI's PMO Guide, published in February 2025.

Mounir regularly shares his knowledge through blog articles, podcasts, videos, webinars, and workshops. He has presented professional papers at project management conferences worldwide.



About Uruk Project Management



Uruk Project Management is built on a simple conviction: sustainable value delivery requires more than good intentions; it requires a coherent system of *Principles*, *Framework*, and *Processes* working together.

- *Principles* establish the “why”: the values and rules that guide sound decision-making regardless of industry or project type. They are the fixed points that keep practice grounded, even as processes evolve to meet the needs of a specific engagement, sector, or scale.
- *Framework* provides the “what”: the structure, terminology, and logic that give practitioners a common language. This is where governance, methodology, and the disciplines of managing projects, programs, and portfolios come together into one coherent architecture rather than a collection of disconnected practices.
- *Processes* deliver the “how”: the repeatable steps and tools that turn intent into results, adaptable across small projects, complex projects, and full programs without losing consistency or rigor.

Together, these three elements converge into **the Uruk Framework**: an integrated system in which governance defines the oversight and decision rights, and the **Value Delivery Methodology (VDM)** defines the disciplined path from strategic intent through to realized value. It is this convergence- Principles anchoring Framework, Framework structuring Processes, and all three unified under governance and VDM that allows the same underlying system to scale from a single small project to an enterprise-wide portfolio of programs.

The *Strategy to Results* series exists to make this convergence explicit. Across its seven books, the series provides the thought leadership that explains the Principles, Framework, and Processes in depth: how they are defined, how they relate to one another, and how governance and VDM operationalize them at every level, from strategic vision down to individual project delivery. Rather than presenting isolated tools or techniques, the series lays out the reasoning behind the Uruk Framework itself, so that practitioners understand not just *what* to do, but *why* it works.

The Uruk Framework does not remain theoretical. It is engineered directly into **Stratija**, our technology platform, which operationalizes the framework’s principles, structures, and processes into practical, usable tools for organizations and practitioners alike.

Stratija, in turn, is an essential element of an integrated ecosystem of four pillars, each reinforcing the others. At the center of this ecosystem sits **Services**: the practical expression of everything Uruk Project



Management does, drawing on advisory work, learning offerings, published content, and technology in an integrated, mutually reinforcing way.

- **Advisory & Consultancy:** applying the Uruk Framework to solve real organizational challenges.
- **Learning & Development:** building practitioner and organizational capability through training and on-demand learning grounded in the same framework.
- **Content & Publishing:** the books, articles, and thought leadership, including this series and the broader Knowledge Portal that document and disseminate the framework and other relevant content, tools, templates, and other resources.
- **Technology: Stratija:** the software that embeds the framework into daily practice.

This is the same framework: the same Principles, Framework, and Processes, unified by governance and VDM that underlie the *Strategy to Results* series. The books, the training, the advisory engagements, and the technology are not separate initiatives; they are different expressions of one unified approach to delivering value.

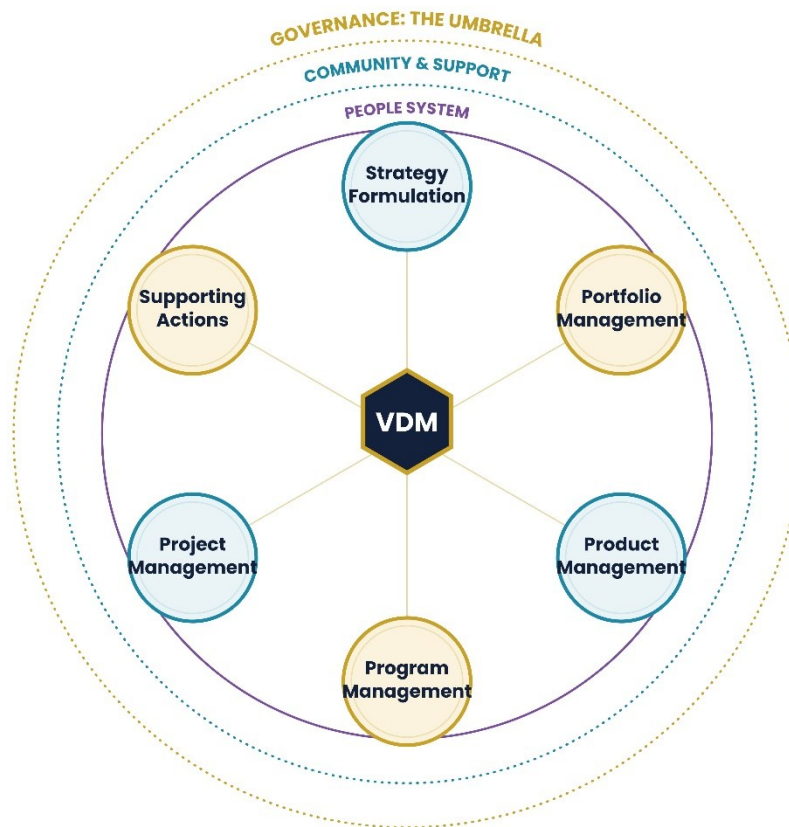
For more information, visit: www.urukpm.com.



About Stratija

The project and program methodology in the **Strategy to Results** series, introduced at the strategic level in ***Vision Realized!*** and ***Successful Transformation***, formalized in ***Practical Governance*** and ***Delivering Value***, and demonstrated in practice across the series' final three books, does not have to live on paper alone. The same applies to the Uruk Framework, a governance-centric framework that helps organizations bridge strategy to results, starting with strategy formulation and ending with delivered value through effective execution.

Accordingly, Uruk Project Management is building Stratija™, a comprehensive, integrated organizational



solution grounded in a simple premise: strategy and results should never be separate conversations. The name blends Strategia, the Arabized term for strategy, and Natija, Arabic for outcome or result, into one word for the whole arc from intent to impact. It is a governance-centric framework that is the umbrella for all project management actions and functions. Finally, the Value Delivery Methodology™ (VDM™), also framed as Vision to Value, is the core of this solution, not something layered on as an afterthought.

At its center, Stratija is built on the **Uruk Nexus™**: VDM itself, connected with the six envisioned elements of the platform, and wrapped by two further rings, the **People System** closest in and **Community and**



Support just beyond it, each touching and supporting every element of the platform. Connected to that core are sections for tailored project delivery, program and portfolio management, and strategy formulation, connecting strategy to a portfolio of projects and programs, with Governance embedded throughout rather than sitting apart from it.

Each part of this structure traces back to a specific part of the series. Strategy Formulation and Portfolio Management extend the portfolio thinking introduced in ***Successful Transformation***; the Governance ring operationalizes the framework built out in ***Practical Governance***; and Program Management, Project Management, and their tailored methods put the methodology from ***Delivering Value*** into practice: the same practice carried further across the series' final three books. Reading the series and using Stratija are two ways into the same framework: one on the page, one at work.

Stratija's MVP centers on ten default tailored methods, covering projects of different sizes and complexities and supporting iterative and incremental approaches as well as sequential ones. The MVP also includes a Tailored Method Builder (TMB) that lets your organization clone and adapt one (or more) of those defaults into your own bespoke methods. Two capabilities begin building organizational memory from day one: an Internal Knowledge Portal, part of the People System, and a Captured Lessons Learned module, drawn from Portfolio Management.

From there, the platform expands across future releases into more than fifty modules for portfolio, product, program, and project management, plus supporting action modules for the daily work of delivery. Community and Support, meanwhile, turns what one organization learns into something the wider Stratija community can draw on.

In keeping with the diversity-of-practice principle that runs through this entire series, Stratija is built to be domain-agnostic from the start, equally at home in oil and gas, technology, government, healthcare, not-for-profit, or education. This is the value of tailored methods.

Stratija is currently under development, with an MVP release in progress. Readers of the Strategy to Results series are among the first we would like to hear from as it takes shape.

From Strategy to Results, Connected.

To learn more or request early access, visit www.stratija.com or contact hello@stratija.com.



About Uruk Publishing & Learning

Uruk Publishing and Learning is the publishing and education division of Uruk Project Management. It was established to support the professional development of project practitioners at every level of their career journey, from foundational competence through advanced program leadership.

The division publishes the **Strategy to Results** series and other professional resources that translate decades of real-world experience into practical, governance-anchored guidance. These publications are designed to bridge the gap between theory and practice, providing professionals with the frameworks, methodologies, and insights they need to deliver value consistently.

In parallel, Uruk Learning Academy is a new initiative under development and will offer a comprehensive online learning platform. The Academy provides:

On-Demand Learning Tracks: These will be short courses, 30-60 minutes, each focusing on a single topic, but grouped in tracks.

Courses and workshops aligned with the **Strategy to Results** series and the **Uruk Framework**.

Custom training solutions for organizations seeking to build capability at scale.

Together with Stratija and our Advisory & Consultancy services, Uruk Publishing and Learning form two of the four pillars through which Uruk Project Management delivers on the Uruk Framework.

Whether you are a new practitioner building foundational competence, an experienced project manager leading complex initiatives, or an executive seeking to transform your organization's project management capability, Uruk Publishing and Learning provides the resources to support your journey.

For more information about our books, visit: <https://urukpm.com/books/>, part of our broader Knowledge Portal of project management resources. Further, for information about the learning program, please visit: <https://urukpm.com/learning-and-development/>.