

ENGLISH FOR WORK / ENGLISH FOR CLIENT ENGAGEMENTS

Consulting English

Clarify the question. Make the recommendation usable.



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Eight practical lessons. Eleven extended conversations.
Vocabulary, phrase banks, guided speaking, and explained answers.

Revised 2026 edition / Upper-intermediate to advanced

Your route through the book

01 Client Discovery and Problem Definition, page 4

Turn a request for benchmarking into an agreed decision question with boundaries, criteria, and an owner.

02 Hypotheses and Issue Trees, page 15

Use a working hypothesis to organize analysis while checking alternative explanations, overlapping categories, and evidence that could contradict it.

03 Data Requests and Client Burden, page 30

Prioritize a client data request, define the required measures, and agree a feasible delivery sequence without collecting unnecessary personal information.

04 Slide Storylines and Executive Synthesis, page 41

Convert an analytical presentation into a supported recommendation with a specific request, visible limits, and an agreed test.

05 Scope Management and Change Requests, page 54

Respond constructively to additional work by distinguishing the agreed scope from the proposed change and explaining options without premature commitments.

06 Difficult Client Feedback, page 67

Acknowledge a missed constraint, restate its effect on the recommendation, and agree a credible correction without becoming defensive or promising an untested solution.

07 Implementation and Change Management, page 81

Explain implementation readiness using training, observed practice, operational cover, and ownership rather than treating communication as adoption.

08 Steering Committees and Final Readouts, page 94

Close a divided decision meeting by summarizing trade-offs, distinguishing agreement from authorization, and recording the actual decision and owned follow-ups.

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Suggested study range: B2-C1. This is an editorial study range, not a certified proficiency assessment.

A clear point of view. A traceable basis.

Consultants need to be concise without disguising uncertainty, helpful without promising unlimited scope, and confident without treating a working hypothesis as a fact. These cases practice the language of real client work, from the first discovery conversation to the final decision.

Ask what the work will decide

A requested analysis is often a means, not the business decision itself. Clarify the choice, owner, criteria, and deadline before collecting a large amount of information.

"What decision should the benchmarking study help you make?"

Test the attractive explanation

A plausible story can organize analysis, but it must remain open to evidence against it. Separate a proposed explanation from an established finding.

"Price is a working hypothesis; we have not yet ruled out service or competitor changes."

Make the implication visible

Executives need to know why a finding matters for their choice. Connect the evidence to a bounded recommendation and an explicit request, without hiding material limitations in supporting pages.

"The evidence supports a limited pilot, not a full rollout today."

Own revisions without inventing agreement

A missed constraint deserves a direct acknowledgment and a revised analysis. A positive discussion does not equal approval, and agreement on the problem does not settle the option.

"We agree on the problem, but the preferred option remains undecided."

Professional boundaries

All clients, engagements, people, figures, contracts, policies, and decisions are fictional. This is professional English practice, not legal, financial, statistical, or implementation advice. Real decisions require the applicable evidence, contractual terms, approvals, and qualified review. The cited organizations do not endorse this book.

A Read the situation

LESSON 01 / CLIENT DISCOVERY AND PROBLEM DEFINITION

Turn a request for benchmarking into an agreed decision question with boundaries, criteria, and an owner.

The requested study is not the decision

Client sponsor Rita asks consultant Owen for a benchmark of support-center costs. During discovery, she explains that the executive committee must decide by 30 November whether to centralize the North and South support centers or retain them separately. The comparison must address total operating cost, response time, and service continuity, including transition effects. Staffing and customer-impact data are not yet available. Centralization has not been approved. Owen must define the decision and evidence needs before treating a peer cost comparison as a recommendation to close either site.

People: Rita, Client sponsor; Owen, Engagement lead.

Read the record

Choose one answer per question using the facts above.

1. What must the executive committee decide?

- A.** Whether to centralize the two centers or retain them separately
- B.** Which center has already been approved for closure
- C.** Whether benchmarking is forbidden
- D.** Which consultant should approve staffing changes

2. When is the decision needed?

- A.** By 30 November
- B.** After an unspecified annual review
- C.** Immediately without evidence
- D.** Only after both sites close

3. Which criteria belong in the comparison?

- A.** Cost, response time, and service continuity, including transition effects
- B.** Peer cost alone
- C.** Only the presentation length
- D.** Only the consultant's preferred operating model

[Answers and explanations, page 123](#)

B Vocabulary in use

CORE TERMS

discovery

Early inquiry to understand the client situation and decision.

conduct client discovery

decision question

The choice that the analysis is intended to support.

define the decision question

decision owner

The person or body authorized to make the relevant choice.

identify the decision owner

peer group

Organizations or units selected for comparison.

define the peer group

operating model

How an organization arranges people, processes, systems, and responsibilities.

compare operating models

decentralization

Distributing specified activities or authority across units.

assess decentralization

problem statement

A precise description of the question or issue to address.

refine the problem statement

client sponsor

The client representative supporting and directing the engagement within their role.

align with the client sponsor

benchmark

A reference used for a defined comparison.

establish a benchmark

comparability

The degree to which a comparison uses sufficiently similar definitions and conditions.

assess comparability

centralization

Concentrating specified activities or authority in a common location or structure.

evaluate centralization

baseline

The defined starting position used for comparison.

establish the baseline

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

discovery **DISCOVERY**

conduct client discovery

Keep the meaning precise: Early inquiry to understand the client situation and decision.

benchmark **BENCHMARK**

establish a benchmark

Keep the meaning precise: A reference used for a defined comparison.

B Precision and professional shorthand

EXTEND YOUR RANGE

decision criterion

A factor used to evaluate alternatives.

agree decision criteria

service continuity

Maintaining the required service through an operating change.

assess service continuity

steady-state cost

Cost after a defined transition has settled.

compare steady-state costs

stakeholder map

A representation of relevant parties and their interests or roles.

build a stakeholder map

out-of-scope

Excluded from the agreed work boundaries.

identify out-of-scope work

engagement charter

A document summarizing purpose, boundaries, roles, and arrangements.

confirm the engagement charter

constraint

A limit that an option must respect or explicitly address.

surface a constraint

transition cost

A cost associated with moving from one arrangement to another.

estimate transition costs

response time

Elapsed time to provide a specified response.

define response time

in scope

Included in the agreed work boundaries.

confirm what is in scope

success measure

A defined indicator of whether the intended result has been achieved.

agree success measures

decision deadline

The date or time by which a choice is needed.

work to the decision deadline

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

baseline **BASELINE**

establish the baseline

Keep the meaning precise: The defined starting position used for comparison.

steady-state cost **STEADY-STATE COST**

compare steady-state costs

Keep the meaning precise: Cost after a defined transition has settled.

Phrases that move the work forward

Clarify the purpose

What decision should this benchmark help you make?

Confirm the owner

The executive committee owns that decision.

Keep the option open

Centralization has not been approved.

Separate cost types

Show transition costs separately from steady-state costs.

Name an evidence gap

We do not yet have the staffing and customer-impact data.

Set the boundary

This phase evaluates options; it does not authorize implementation.

Reflect the request

The benchmark is one input to the operating-model decision.

Check understanding

Is that the choice you need the analysis to support?

State the real choice

The choice is centralization or continued separate operation.

Confirm the date

The recommendation needs to support the thirtieth-of-November decision.

Identify the criteria

We need to compare cost, response time, and service continuity.

Check comparability

Are the peer figures based on comparable services and definitions?

Avoid a premature conclusion

A lower peer cost would not by itself justify closing a site.

Ask about constraints

Which service requirements must remain intact during transition?

Confirm the deliverable

We will produce a decision-focused option comparison.

Close discovery

Let us record the question, criteria, owner, deadline, and evidence needs.

Precision in real exchanges

Purpose: Confirm the date

Useful wording: The recommendation needs to support the thirtieth-of-November decision.

Purpose: Keep the option open

Useful wording: Centralization has not been approved.

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which problem statement fits the brief?

- A.** How many slides will impress the committee?
- B.** Which peer cost proves centralization is always best?
- C.** Should North and South be centralized, given cost, response time, continuity, and transition effects?
- D.** How can we justify the already approved closure?

2. Which benchmark caveat matters?

- A.** Using the latest reporting year resolves differences in service hours.
- B.** Peer service scope and cost definitions may differ.
- C.** Matching company size makes cost definitions unnecessary.
- D.** Comparing cost per case removes differences in case complexity.

3. A colleague needs the term for this meaning: The client representative supporting and directing the engagement within their role. Which term fits?

- A.** operating model
- B.** out-of-scope
- C.** client sponsor
- D.** service continuity

D Choose the response that fits / continued

4. Rebuild the exchange from "The requested study is not the decision". Rita: "Agreed. Nothing has been approved. The executive committee needs a recommendation by the thirtieth of November." Owen: [missing response] Rita: "Cost matters, but we also need acceptable response times and continuity. A cheap arrangement that interrupts service would not solve the problem." Which response belongs in the gap?

- A.** Let us establish the baseline and list those gaps. We can plan the evidence work without filling missing figures with assumptions that look like confirmed client data.
- B.** Before we define the peer group, what decision should the benchmark help you make? That will determine which comparisons are useful and which would simply add more numbers.
- C.** That clarifies the decision owner. We can direct the recommendation to the committee and ask you to confirm the factual inputs and engagement arrangements within your role.
- D.** I will record that decision deadline. We should also confirm who will supply information and when the committee needs material for its own review before that date.

[Answers and explanations, page 123](#)

One useful distinction

A benchmark compares selected measures against a reference group. It does not itself decide the operating model. Different service hours, case complexity, or cost definitions can make apparently similar figures misleading unless the comparison is adjusted or qualified.

E Conversation

The requested study is not the decision

The requested study is not the decision

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

peer group / transition cost / engagement charter / comparability / decision owner /
decision question / baseline / decision criteria / decision deadline / in scope

- 01 **Rita:** The committee keeps asking why our support centers cost so much. Could you give us a peer benchmark before the next decision meeting?
- 02 **Owen:** Before we define the ¹ _____, what decision should the benchmark help you make? That will determine which comparisons are useful and which would simply add more numbers.
- 03 **Rita:** We need to decide whether North and South should become one centralized support operation or continue running separately.
- 04 **Owen:** Then our ² _____ is about the operating model. The cost benchmark is an input, but we should not let it silently become a recommendation to close either site.
- 05 **Rita:** Agreed. Nothing has been approved. The executive committee needs a recommendation by the thirtieth of November.
- 06 **Owen:** I will record that ³ _____. We should also confirm who will supply information and when the committee needs material for its own review before that date.

E Conversation / continued

- 07 **Rita:** Cost matters, but we also need acceptable response times and continuity. A cheap arrangement that interrupts service would not solve the problem.
- 08 **Owen:** Those are our ⁴ _____. We need definitions for each, so the team does not optimize a cost measure while overlooking the service requirements the committee actually values.
- 09 **Rita:** I can imagine a lower annual cost after centralizing. Getting there is another matter. We have not costed the move or the service disruption.
- 10 **Owen:** Separate ⁵ _____ from the steady-state comparison. We should show temporary effects and ongoing costs distinctly, rather than present a future operating estimate as the whole business case.

Conversation continues on the next page.

The requested study is not the decision

CONVERSATION / CONTINUED

- 11 **Rita:** The peer organizations may handle different types of support requests. Some provide fewer service hours than we do.
- 12 **Owen:** That affects ⁶ _____. We need matching definitions or visible qualifications. A lower cost elsewhere does not tell us that either of your centers is inefficient under the same conditions.
- 13 **Rita:** I can arrange access to the current service figures. Staffing and customer-impact information will take longer to obtain.
- 14 **Owen:** Let us establish the ⁷ _____ and list those gaps. We can plan the evidence work without filling missing figures with assumptions that look like confirmed client data.
- 15 **Rita:** Should the initial work include a detailed implementation plan, or would that get ahead of the decision?
- 16 **Owen:** We should define what is ⁸ _____. The option comparison needs transition implications, but a full implementation plan is a separate level of work that we should not assume is included.
- 17 **Rita:** The committee will make the choice. I can sponsor the engagement and coordinate the inputs, but I cannot approve a closure myself.
- 18 **Owen:** That clarifies the ⁹ _____. We can direct the recommendation to the committee and ask you to confirm the factual inputs and engagement arrangements within your role.
- 19 **Rita:** Please summarize the question, boundaries, criteria, and dates so that everyone starts with the same understanding.
- 20 **Owen:** I will put them in the ¹⁰ _____. Then the benchmark serves the actual choice, and the team has a clear basis for deciding what evidence to collect first.

CHECK THE GAPS

1. peer group / **2.** decision question / **3.** decision deadline / **4.** decision criteria / **5.** transition cost / **6.** comparability / **7.** baseline / **8.** in scope / **9.** decision owner / **10.** engagement charter

[Why these answers fit, page 124](#)

F Check accuracy and scope

The requested study is not the decision

Return to the case

Client sponsor Rita asks consultant Owen for a benchmark of support-center costs. During discovery, she explains that the executive committee must decide by 30 November whether to centralize the North and South support centers or retain them separately. The comparison must address total operating cost, response time, and service continuity, including transition effects. Staffing and customer-impact data are not yet available. Centralization has not been approved. Owen must define the decision and evidence needs before treating a peer cost comparison as a recommendation to close either site.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. What does the evidence gap mean?

- A. The consultant may invent the missing figures.
- B. Staffing and customer-impact information is still needed.
- C. Centralization is necessarily wrong.
- D. Separate operation is necessarily wrong.

2. Which phrase preserves engagement authority?

- A. This phase evaluates options; implementation requires a separate authorized decision.
- B. Discovery automatically authorizes closure.
- C. The consultant replaces the executive committee.
- D. Asking for a benchmark commits the client to centralization.

[Answers and explanations, page 126](#)

Listen for the distinction

Use the answer key to correct all ten gaps. Reread the peer-comparison and transition-cost exchanges without dropping their qualifications.

Clarification can be a form of service

Questioning a requested deliverable can sound obstructive if it is detached from the client objective. Explain how the clarification makes the work more useful, then confirm the decision in the client language. Avoid implying that the sponsor asked a foolish question.

F Say it / transfer to a new case

Clarify a different requested study

A sponsor requests a vendor-price comparison. The actual choice is whether to renew the current provider or run a new competition. The procurement committee decides by 15 January, using total cost, service performance, and transition risk.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

15 January / a new competition / procurement committee / transition risk

- 01 **Consultant:** The actual alternatives are renewal or ¹ _____.
- 02 **Sponsor:** The decision owner is the ² _____.
- 03 **Consultant:** The decision deadline is ³ _____.
- 04 **Sponsor:** The comparison must include total cost, performance, and ⁴ _____.

CHECK THE GAPS

1. a new competition / 2. procurement committee / 3. 15 January / 4. transition risk

[Why these answers fit, page 126](#)

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "The requested study is not the decision". Rita: "I can arrange access to the current service figures. Staffing and customer-impact information will take longer to obtain." Owen: [missing response] Rita: "Should the initial work include a detailed implementation plan, or would that get ahead of the decision?" Which response belongs in the gap?

- A.** Before we define the peer group, what decision should the benchmark help you make? That will determine which comparisons are useful and which would simply add more numbers.
- B.** Let us establish the baseline and list those gaps. We can plan the evidence work without filling missing figures with assumptions that look like confirmed client data.
- C.** That clarifies the decision owner. We can direct the recommendation to the committee and ask you to confirm the factual inputs and engagement arrangements within your role.
- D.** I will record that decision deadline. We should also confirm who will supply information and when the committee needs material for its own review before that date.

[Answers and explanations, page 127](#)

A Read the situation

LESSON 02 / HYPOTHESES AND ISSUE TREES

Use a working hypothesis to organize analysis while checking alternative explanations, overlapping categories, and evidence that could contradict it.

A frequent complaint is not yet the cause of churn

A client lost 60 accounts last quarter. Twenty departing customers volunteered for interviews: 12 mentioned price, 9 mentioned service delays, and 5 mentioned competitor features. Each person could mention more than one issue. Consultant Ada wants to lead with price as the cause of churn; manager Karim asks for a testable hypothesis and a structured inquiry into the alternatives. The interview sample is not established as representative. Timing, customer segments, actual prices paid, and comparable nondeparting accounts have not yet been analyzed. No causal driver has been isolated.

People: Ada, Consultant; Karim, Engagement manager.

Read the record

Choose one answer per question using the facts above.

1. How many departing accounts were interviewed?

- A. Twenty-six distinct accounts
- B. Twenty of the sixty departing accounts
- C. All sixty accounts
- D. Twenty current nondeparting accounts only

2. Why do the mentions add to more than twenty?

- A. Respondents could mention multiple issues.
- B. The interview count must be fraudulent.
- C. Each mention proves a separate departure.
- D. The percentages use all sixty departures.

3. What has the team established about causation?

- A. Competitor features cannot matter.
- B. No causal driver has been isolated.
- C. Price caused every departure.
- D. Service had no effect.

[Answers and explanations, page 128](#)

B Vocabulary in use

CORE TERMS

hypothesis

A proposed explanation that can be examined against evidence.

test a hypothesis

hypothesis tree

A breakdown of a proposed explanation into testable supporting claims.

develop a hypothesis tree

churn

Customer or account loss, defined over a specified period and population.

analyze account churn

exit interview

A conversation with someone leaving a service or organization.

conduct exit interviews

mention count

The number of recorded references to a specified topic.

report mention counts

sampling bias

Distortion associated with how observations enter a sample.

assess sampling bias

issue tree

A structured breakdown of a question into related subquestions.

build an issue tree

workstream

A coordinated part of the engagement's work.

assign a workstream

churn driver

A factor contributing to customer departure.

investigate churn drivers

multi-response question

A question allowing more than one answer category.

interpret a multi-response question

sample

The observations included in an analysis.

define the sample

MECE

Mutually exclusive and collectively exhaustive; a structuring aim of avoiding overlap and missing categories.

test a MECE structure

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

hypothesis HYPOTHESIS

test a hypothesis

Keep the meaning precise: A proposed explanation that can be examined against evidence.

churn driver CHURN DRIVER

investigate churn drivers

Keep the meaning precise: A factor contributing to customer departure.

B Precision and professional shorthand

EXTEND YOUR RANGE

overlap

Inclusion of the same observation in more than one category.

identify category overlap

alternative explanation

A different possible account of an observed result.

test alternative explanations

confirmation bias

Favoring information that supports an existing belief.

challenge confirmation bias

segmentation

Dividing a population into defined groups for analysis.

use customer segmentation

price sensitivity

Responsiveness to price changes under specified conditions.

examine price sensitivity

double counting

Counting the same item more than intended in a total.

prevent double counting

disconfirming evidence

Information that weakens or contradicts a hypothesis.

seek disconfirming evidence

causal mechanism

The process through which one factor could produce an effect.

specify the causal mechanism

cohort

A group sharing a defined starting characteristic or period.

compare customer cohorts

confounder

Another factor that complicates a proposed causal interpretation.

examine potential confounders

B Precision and professional shorthand / continued

triangulation

Comparing different evidence sources or methods.

triangulate the finding

analytical priority

A question selected for attention based on decision relevance and evidence needs.

set analytical priorities

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

MECE **MECE**

test a MECE structure

Keep the meaning precise: Mutually exclusive and collectively exhaustive; a structuring aim of avoiding overlap and missing categories.

confirmation bias **CONFIRMATION BIAS**

challenge confirmation bias

Keep the meaning precise: Favoring information that supports an existing belief.

Phrases that move the work forward

Keep the explanation provisional

Price is a working hypothesis, not an established churn driver.

Limit the percentage

Twelve of those twenty interviewees mentioned price.

Avoid a false total

The categories are not mutually exclusive.

Test the alternative

We also need to examine service experience and competitor changes.

Check timing

Did the price change precede the departure?

Segment the evidence

Separate the patterns by relevant customer group.

Avoid a causal shortcut

A frequent complaint does not by itself isolate a cause.

Revise openly

The new evidence may require us to change the initial explanation.

State the sample

We interviewed twenty of the sixty departing accounts.

Explain overlap

Respondents could name more than one issue.

Ask for a mechanism

How would the proposed price effect lead to departure?

Look for contradiction

What evidence would weaken the price hypothesis?

Compare carefully

How do otherwise comparable nondeparting accounts differ?

Check actual exposure

Use prices actually paid, not only the published list price.

Prioritize the work

Start with questions that could change the client decision.

Close the analysis plan

Assign a test, evidence source, and owner to each priority question.

Precision in real exchanges

Purpose: Explain overlap

Useful wording: Respondents could name more than one issue.

Purpose: Avoid a false total

Useful wording: The categories are not mutually exclusive.

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which finding is supported?

- A.** All sixty departing customers answered the interview.
- B.** The three categories cover separate people only.
- C.** Twelve of twenty volunteer interviewees mentioned price.
- D.** Price caused 60% of all departures.

2. Which follow-up best tests rather than protects the hypothesis?

- A.** Recode overlapping complaints so price becomes each respondent's only category.
- B.** Compare this quarter's departing accounts with all customers from a different product line.
- C.** Ask only the twelve price complainants whether a discount would have helped.
- D.** Examine whether comparable accounts with similar price changes stayed.

3. A colleague needs the term for this meaning: A coordinated part of the engagement's work. Which term fits?

- A.** workstream
- B.** mention count
- C.** alternative explanation
- D.** price sensitivity

D Choose the response that fits / continued

4. Rebuild the exchange from "A frequent complaint is not yet the cause of churn".

Ada: "Twelve out of twenty is sixty percent. I should say sixty percent of interviewees mentioned price, not sixty percent of departures were caused by price." **Karim:** [missing response] **Ada:** "How should I organize the next analysis without creating a huge list of every possible reason someone might cancel?" Which response belongs in the gap?

- A.** That is useful triangulation. Keep discrepancies visible. Agreement across sources may strengthen an interpretation, but it does not automatically remove all alternative explanations.
- B.** Build an issue tree around questions that could change the retention decision. Include price exposure, service experience, and competitor developments, while being clear that real causes may interact.
- C.** Make it a hypothesis, not a finding about cause. We have twenty volunteer interviews from sixty departures, and the way people entered that sample could affect what we hear.
- D.** Exactly. The sample defines that percentage. We have not established representativeness, and mentioning a concern does not isolate its causal effect on the decision to leave.

[Answers and explanations, page 128](#)

One useful distinction

Twelve of twenty interviewees mentioned price: 60% of that interview group. It is not evidence that price caused 60% of all sixty departures. The price, service, and competitor counts overlap because respondents could give more than one answer.

E Conversation

A frequent complaint is not yet the cause of churn

A frequent complaint is not yet the cause of churn

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

disconfirming evidence / hypothesis / sample / causal mechanism / MECE / issue tree / segmentation / triangulation / overlap / analytical priority

- 01 **Ada:** Price tops the exit-interview list. My draft says it is driving churn. Before I send that to the client, does the evidence justify the wording?
- 02 **Karim:** Make it a ¹ _____, not a finding about cause. We have twenty volunteer interviews from sixty departures, and the way people entered that sample could affect what we hear.
- 03 **Ada:** Twelve mentioned price, nine mentioned service delays, and five mentioned competitor features. The total is greater than twenty because people could mention several issues.
- 04 **Karim:** Then disclose the ² _____. Those are topic mentions, not separate groups of departing accounts. A clean-looking chart must not imply that the categories are mutually exclusive when they are not.
- 05 **Ada:** Twelve out of twenty is sixty percent. I should say sixty percent of interviewees mentioned price, not sixty percent of departures were caused by price.
- 06 **Karim:** Exactly. The ³ _____ defines that percentage. We have not established representativeness, and mentioning a concern does not isolate its causal effect on the decision to leave.

E Conversation / continued

- 07 **Ada:** How should I organize the next analysis without creating a huge list of every possible reason someone might cancel?
- 08 **Karim:** Build an ⁴ _____ around questions that could change the retention decision. Include price exposure, service experience, and competitor developments, while being clear that real causes may interact.
- 09 **Ada:** We sometimes call our trees MECE. That could be misleading if we use the label to suggest that these customer experiences cannot coexist.
- 10 **Karim:** Treat ⁵ _____ as a structuring check, not a substitute for understanding the data. Define the coding and identify gaps or overlaps instead of forcing complex departures into artificial single-cause boxes.

Conversation continues on the next page.

A frequent complaint is not yet the cause of churn

CONVERSATION / CONTINUED

- 11 **Ada:** For price, we could check the amounts customers actually paid and whether a change occurred before cancellation.
- 12 **Karim:** That begins to test a ⁶ _____. Timing matters, and list prices may differ from actual exposure because of discounts or contract terms. We should not assume every account faced the same change.
- 13 **Ada:** What about accounts that had the same price increase and stayed? I have focused on departures, but that comparison could change the story.
- 14 **Karim:** That could provide ⁷ _____. Check comparability and relevant differences before interpreting it. The aim is to test the explanation, not select the most convenient retained accounts to prove the opposite.
- 15 **Ada:** Service delays may affect some customer groups more than others. A combined result could hide that pattern.
- 16 **Karim:** Use relevant ⁸ _____. But document how groups are defined, and do not repeatedly regroup the data just until a compelling story appears.
- 17 **Ada:** We can compare interview accounts, service records, and actual commercial terms to see where the evidence agrees or conflicts.
- 18 **Karim:** That is useful ⁹ _____. Keep discrepancies visible. Agreement across sources may strengthen an interpretation, but it does not automatically remove all alternative explanations.
- 19 **Ada:** I will revise the update to state the interview pattern and the tests needed before recommending a price response.
- 20 **Karim:** Good. Set each ¹⁰ _____ with an evidence source and owner. The initial hypothesis should help us learn faster, not make the team resistant to what the next analysis finds.

CHECK THE GAPS

1. hypothesis / 2. overlap / 3. sample / 4. issue tree / 5. MECE / 6. causal mechanism / 7. disconfirming evidence / 8. segmentation / 9. triangulation / 10. analytical priority

[Why these answers fit, page 129](#)

F Check accuracy and scope

A frequent complaint is not yet the cause of churn

Return to the case

A client lost 60 accounts last quarter. Twenty departing customers volunteered for interviews: 12 mentioned price, 9 mentioned service delays, and 5 mentioned competitor features. Each person could mention more than one issue. Consultant Ada wants to lead with price as the cause of churn; manager Karim asks for a testable hypothesis and a structured inquiry into the alternatives. The interview sample is not established as representative. Timing, customer segments, actual prices paid, and comparable nondeparting accounts have not yet been analyzed. No causal driver has been isolated.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. How should the issue categories be presented?

- A. As mutually exclusive simply because the slide says MECE
- B. As percentages of an unstated population
- C. As overlapping mentions, with the coding method explained
- D. As 26 unique departures from 20 interviews

2. What makes an analytical priority useful?

- A. It confirms the first theory by definition.
- B. It eliminates all uncertainty without data.
- C. It could change the decision and has an explicit evidence test.
- D. It is the easiest chart to produce.

[Answers and explanations, page 131](#)

Listen for the distinction

Correct the ten gaps from the key. Reread the exchanges on overlapping mentions and evidence against the price hypothesis.

Challenge the logic, not the analyst

A sharp question about an explanation can improve the work without rejecting the person who proposed it. State which part is useful, then ask what would weaken it. A team that can revise its first answer is more credible than one that protects it from contrary evidence.

F Say it / transfer to a new case

Interpret another overlapping interview sample

Forty customers departed. Ten volunteered for interviews; six mentioned onboarding and five mentioned support. Multiple answers were allowed. The sample has not been shown to represent every departing customer.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

ten customers / overlapping mentions / causal driver / 60%

- 01 **Analyst:** The interview sample contains ¹ _____.
- 02 **Manager:** Onboarding was mentioned by ² _____ of interviewees.
- 03 **Analyst:** The categories contain ³ _____.
- 04 **Manager:** The result does not establish a ⁴ _____.

CHECK THE GAPS

1. ten customers / 2. 60% / 3. overlapping mentions / 4. causal driver

[Why these answers fit, page 131](#)

F Say it / transfer to a new case / continued

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "A frequent complaint is not yet the cause of churn". Ada: "What about accounts that had the same price increase and stayed? I have focused on departures, but that comparison could change the story." Karim: [missing response] Ada: "Service delays may affect some customer groups more than others. A combined result could hide that pattern." Which response belongs in the gap?

- A.** That could provide disconfirming evidence. Check comparability and relevant differences before interpreting it. The aim is to test the explanation, not select the most convenient retained accounts to prove the opposite.
- B.** Treat MECE as a structuring check, not a substitute for understanding the data. Define the coding and identify gaps or overlaps instead of forcing complex departures into artificial single-cause boxes.
- C.** Then disclose the overlap. Those are topic mentions, not separate groups of departing accounts. A clean-looking chart must not imply that the categories are mutually exclusive when they are not.
- D.** Good. Set each analytical priority with an evidence source and owner. The initial hypothesis should help us learn faster, not make the team resistant to what the next analysis finds.

[Answers and explanations, page 132](#)

Review 1 / Meaning and context

Use language from the lessons you have completed. Choose one answer per question.

Case file

Revisit "Client Discovery and Problem Definition" and "Hypotheses and Issue Trees". Choose precise terminology, then reconstruct the missing responses using both neighboring turns. The final two questions also revisit earlier conversations.

1. A colleague needs the term for this meaning: The choice that the analysis is intended to support. Which term fits?

- A. constraint
- B. decision question
- C. in scope
- D. comparability

2. A colleague needs the term for this meaning: A question allowing more than one answer category. Which term fits?

- A. multi-response question
- B. segmentation
- C. overlap
- D. hypothesis

3. Rebuild the exchange from "The requested study is not the decision". Rita: "I can imagine a lower annual cost after centralizing. Getting there is another matter. We have not costed the move or the service disruption." Owen: [missing response] Rita: "The peer organizations may handle different types of support requests. Some provide fewer service hours than we do." Which response belongs in the gap?

- A. Before we define the peer group, what decision should the benchmark help you make? That will determine which comparisons are useful and which would simply add more numbers.
- B. Separate transition cost from the steady-state comparison. We should show temporary effects and ongoing costs distinctly, rather than present a future operating estimate as the whole business case.
- C. Then our decision question is about the operating model. The cost benchmark is an input, but we should not let it silently become a recommendation to close either site.
- D. Those are our decision criteria. We need definitions for each, so the team does not optimize a cost measure while overlooking the service requirements the committee actually values.

Review 1 / Meaning and context / continued

4. Rebuild the exchange from "A frequent complaint is not yet the cause of churn".

Ada: "We can compare interview accounts, service records, and actual commercial terms to see where the evidence agrees or conflicts." Karim: [missing response]

Ada: "I will revise the update to state the interview pattern and the tests needed before recommending a price response." Which response belongs in the gap?

- A.** Build an issue tree around questions that could change the retention decision. Include price exposure, service experience, and competitor developments, while being clear that real causes may interact.
- B.** That is useful triangulation. Keep discrepancies visible. Agreement across sources may strengthen an interpretation, but it does not automatically remove all alternative explanations.
- C.** Use relevant segmentation. But document how groups are defined, and do not repeatedly regroup the data just until a compelling story appears.
- D.** Exactly. The sample defines that percentage. We have not established representativeness, and mentioning a concern does not isolate its causal effect on the decision to leave.

[Answers and explanations, page 163](#)

A Read the situation

LESSON 03 / DATA REQUESTS AND CLIENT BURDEN

Prioritize a client data request, define the required measures, and agree a feasible delivery sequence without collecting unnecessary personal information.

Forty requests, but only six are needed first

Consultant Mateo sends client lead Leah a 40-item request due Friday. The first analysis actually needs six monthly measures for January through June at the North and South centers: completed cases, paid staff hours, labor cost, vendor cost, reopened cases, and opening backlog. That analysis is needed for a Wednesday workshop. Existing aggregate reports may be sufficient, but definitions and period coverage must be checked. The remaining 34 items have not been prioritized. Leah cannot promise the full request. Mateo must agree owners, feasible dates, and approved transfer arrangements rather than demand raw personal records by default.

People: Mateo, Consultant; Leah, Client data lead.

Read the record

Choose one answer per question using the facts above.

1. How many items are required for the first analysis?

- A. Thirty-four
- B. None
- C. Six
- D. All forty

2. Which period is required?

- A. One total with no period definition
- B. Every year of personal records
- C. Only the latest Friday
- D. January through June, monthly, for both centers

3. What is the timing problem?

- A. Friday is necessarily too early for every item.
- B. The workshop has already approved all data.
- C. Data definitions no longer matter because of the deadline.
- D. A Friday deadline is later than the Wednesday workshop that needs the analysis.

[Answers and explanations, page 133](#)

B Vocabulary in use

CORE TERMS

data request list

A documented set of information items requested for an analysis.

prioritize the data request list

minimum viable dataset

The smallest adequate set of information for a defined initial analysis.

define the minimum viable dataset

extract

A selected set of information taken from a source system.

prepare a data extract

granularity

The level of detail represented in the data.

agree the required granularity

data dictionary

Definitions of fields, units, and relevant rules.

request a data dictionary

unit of measure

The scale or quantity in which a value is expressed.

preserve the unit of measure

DRL

Data request list, with items, owners, definitions, and delivery status.

update the DRL

data owner

The person or function responsible for the relevant information.

identify the data owner

aggregate

Information combined into defined groups rather than individual records.

use monthly aggregates

reporting period

The time interval covered by a measure.

specify the reporting period

field definition

The meaning and permitted interpretation of a data item.

confirm field definitions

coverage

The population, locations, or periods included.

check period coverage

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

data request list DATA REQUEST LIST

prioritize the data request list

Keep the meaning precise: A documented set of information items requested for an analysis.

aggregate AGGREGATE

use monthly aggregates

Keep the meaning precise: Information combined into defined groups rather than individual records.

B Precision and professional shorthand

EXTEND YOUR RANGE

completeness

Whether the required information is present.

assess completeness

source system

The originating application or record for data.

identify the source system

access permission

Authorization to view or use specified information.

confirm access permissions

data minimization

Restricting collection to information necessary for the stated purpose.

apply data minimization

delivery sequence

The order in which information will be provided.

agree the delivery sequence

exception log

A record of missing, changed, or unresolved items.

maintain an exception log

reconciliation

A comparison used to explain or resolve differences between records.

reconcile source totals

secure transfer

An approved method for moving information with appropriate protection.

arrange secure transfer

personal data

Information relating to an identifiable individual under the applicable context.

limit personal data

request dependency

A condition that must be met before a requested item can be delivered or used.

identify request dependencies

staged request

A request divided into prioritized batches.

use a staged request

version identifier

A label distinguishing one version of a file or dataset.

record the version identifier

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

coverage COVERAGE

check period coverage

Keep the meaning precise: The population, locations, or periods included.

access permission ACCESS PERMISSION

confirm access permissions

Keep the meaning precise: Authorization to view or use specified information.

Phrases that move the work forward

Acknowledge the burden

The original list did not distinguish what we need first.

Specify the period

We need monthly figures from January through June for both centers.

Check the detail level

Monthly aggregates may be sufficient for this question.

Check cost scope

Do the labor and vendor figures cover the same operating boundary?

Negotiate a date

What can realistically be available before Wednesday's workshop?

Avoid unnecessary collection

We do not need individual personal records for this first analysis.

Keep gaps visible

Please flag missing periods rather than filling them silently.

State an analytical limit

If that measure is unavailable, we will explain the limitation in the workshop.

Explain the priority

Six measures support the first workshop analysis.

Use existing work

Can the existing reports supply those measures?

Define the measure

What does completed case mean in this report?

Assign an owner

Who can confirm the definition and supply each item?

Stage the remainder

We will prioritize the other thirty-four items separately.

Agree the transfer

Use the client-approved channel and access permissions.

Track the version

Record the file version and extraction date.

Close the request

I will circulate the agreed six-item list, owners, dates, and definitions.

Precision in real exchanges

Purpose: Use existing work

Useful wording: Can the existing reports supply those measures?

Purpose: Check the detail level

Useful wording: Monthly aggregates may be sufficient for this question.

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which revised request is most useful?

- A.** Every personal record just in case.
- B.** One unexplained total for both centers combined.
- C.** Six defined monthly measures first, with agreed owners and dates; prioritize the rest separately.
- D.** Forty equally urgent items with no purpose.

2. What should happen if an existing report is available?

- A.** Accept every column without reading definitions.
- B.** Treat its filename as proof of completeness.
- C.** Check its definitions, scope, and coverage before accepting it.
- D.** Reject it automatically because it is not a new extract.

3. A colleague needs the term for this meaning: The person or function responsible for the relevant information. Which term fits?

- A.** source system
- B.** data dictionary
- C.** delivery sequence
- D.** data owner

D Choose the response that fits / continued

4. Rebuild the exchange from "Forty requests, but only six are needed first". Leah: "Please name the six measures. We may already have monthly reports that save the teams from producing new files." Mateo: [missing response] Leah: "We have monthly summaries, but the two sites may define completed and reopened differently. The report labels do not explain that." Which response belongs in the gap?

- A.** Agreed. Each data owner should confirm the definition and feasible delivery date. We will prioritize the other thirty-four items separately once their analytical purpose is clear.
- B.** Our minimum viable dataset is completed cases, paid staff hours, labor cost, vendor cost, reopened cases, and opening backlog for January through June at both centers.
- C.** Include the version identifier as well. I will circulate the six-item request with definitions, owners, dates, and remaining gaps so both teams know exactly what has been agreed.
- D.** Please flag that for reconciliation. We need the cost scope alongside the numbers. A difference in allocation rules could otherwise look like a difference in operating performance.

[Answers and explanations, page 133](#)

One useful distinction

A smaller first request is not a waiver of definitions or quality. Confirm what completed, reopened, and opening mean in the existing reports, along with units, cost scope, and monthly coverage. A timely file with misunderstood fields can produce a misleading comparison.

E Conversation

Forty requests, but only six are needed first

Forty requests, but only six are needed first

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

data request list / reconciliation / version identifier / data dictionary / delivery sequence
/ exception log / secure transfer / granularity / data owner / minimum viable dataset

- 01 **Leah:** Forty items by Friday is more than my team can commit to during reporting close. Which files actually drive the first piece of analysis?
- 02 **Mateo:** You are right. The ¹ _____ did not distinguish what we need first. Only six measures support the initial analysis, and I should have separated them from the rest.
- 03 **Leah:** The workshop is Wednesday. A single Friday deadline does not help us understand what you need in time for that meeting.
- 04 **Mateo:** Let us agree a ² _____ with feasible dates. We need to know what can arrive before Wednesday and what limitations we will have if something is not available.
- 05 **Leah:** Please name the six measures. We may already have monthly reports that save the teams from producing new files.
- 06 **Mateo:** Our ³ _____ is completed cases, paid staff hours, labor cost, vendor cost, reopened cases, and opening backlog for January through June at both centers.
- 07 **Leah:** We have monthly summaries, but the two sites may define completed and reopened differently. The report labels do not explain that.
- 08 **Mateo:** We need a ⁴ _____ or equivalent definitions. Confirm what each field means and which period it covers before we compare figures that only appear to describe the same thing.
- 09 **Leah:** Would monthly totals by center be enough? Individual case records would require a different review and take longer to prepare.
- 10 **Mateo:** That ⁵ _____ may be sufficient for the first question. Let us verify the report coverage and definitions before asking for more detailed data that we do not currently need.

Conversation continues on the next page.

Forty requests, but only six are needed first

CONVERSATION / CONTINUED

- 11 **Leah:** There is a catch in labor cost: North includes a shared-service allocation. I need to check South before you compare the two totals.
- 12 **Mateo:** Please flag that for ⁶ _____. We need the cost scope alongside the numbers. A difference in allocation rules could otherwise look like a difference in operating performance.
- 13 **Leah:** I can identify the relevant owners today. They need to confirm what can be supplied before the workshop, rather than have a date assigned without discussion.
- 14 **Mateo:** Agreed. Each ⁷ _____ should confirm the definition and feasible delivery date. We will prioritize the other thirty-four items separately once their analytical purpose is clear.
- 15 **Leah:** Our team also needs to know how the files will be shared and which consultants are authorized to see them.
- 16 **Mateo:** We will use the approved ⁸ _____ arrangements and access permissions. We do not need names or contact details for these monthly measures, so they should not be collected for this first analysis.
- 17 **Leah:** If a month is missing, should the team leave a note in the file rather than estimate it?
- 18 **Mateo:** Yes, keep an ⁹ _____. Identify the gap and its owner. We will explain its effect on the workshop analysis instead of quietly replacing it with a different period or measure.

Forty requests, but only six are needed first / continued

- 19 **Leah:** Once the owners confirm the first batch, I will send the agreed files with their extraction dates.
- 20 **Mateo:** Include the ¹⁰ _____ as well. I will circulate the six-item request with definitions, owners, dates, and remaining gaps so both teams know exactly what has been agreed.

CHECK THE GAPS

1. data request list / 2. delivery sequence / 3. minimum viable dataset / 4. data dictionary / 5. granularity / 6. reconciliation / 7. data owner / 8. secure transfer / 9. exception log / 10. version identifier

[Why these answers fit, page 134](#)

F Check accuracy and scope

Forty requests, but only six are needed first

Return to the case

Consultant Mateo sends client lead Leah a 40-item request due Friday. The first analysis actually needs six monthly measures for January through June at the North and South centers: completed cases, paid staff hours, labor cost, vendor cost, reopened cases, and opening backlog. That analysis is needed for a Wednesday workshop. Existing aggregate reports may be sufficient, but definitions and period coverage must be checked. The remaining 34 items have not been prioritized. Leah cannot promise the full request. Mateo must agree owners, feasible dates, and approved transfer arrangements rather than demand raw personal records by default.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. What if a priority item cannot arrive before the workshop?

- A. Call a different field equivalent without checking.
- B. Hide the missing item from the presentation.
- C. Agree a realistic plan and state the resulting analytical limit.
- D. Fill it with invented numbers.

2. Which information-handling choice fits the first task?

- A. Assume every consultant may access every system.
- B. Use suitable aggregates through approved access and transfer arrangements.
- C. Request names and contact details without a defined need.
- D. Send raw records through any convenient public channel.

[Answers and explanations, page 135](#)

Listen for the distinction

Check all ten gaps. Reread the period, definition, aggregation, and approved-transfer exchanges using the corrected wording.

Client effort is part of the work plan

A data request competes with the daily responsibilities of the client team. Explain which decision each priority item supports, accept existing formats when suitable, and negotiate dates with the people doing the work. Labeling every item urgent usually makes genuine priorities harder to recognize.

F Say it / transfer to a new case

Stage another information request

A 25-item request contains four inputs needed for a Monday review. Existing weekly summaries may supply them. The remaining 21 items are for later analysis. Client owners must confirm definitions and realistic delivery dates.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

definitions / twenty-one items / four inputs / Monday

- 01 **Consultant:** The first batch contains ¹ _____.
- 02 **Client:** The first review is on ² _____.
- 03 **Consultant:** The later group contains ³ _____.
- 04 **Client:** Before using existing summaries, confirm their ⁴ _____.

CHECK THE GAPS

1. four inputs / 2. Monday / 3. twenty-one items / 4. definitions

[Why these answers fit, page 136](#)

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "Forty requests, but only six are needed first". Leah: "I can identify the relevant owners today. They need to confirm what can be supplied before the workshop, rather than have a date assigned without discussion." Mateo: [missing response] Leah: "Our team also needs to know how the files will be shared and which consultants are authorized to see them." Which response belongs in the gap?

- A.** Agreed. Each data owner should confirm the definition and feasible delivery date. We will prioritize the other thirty-four items separately once their analytical purpose is clear.
- B.** Our minimum viable dataset is completed cases, paid staff hours, labor cost, vendor cost, reopened cases, and opening backlog for January through June at both centers.
- C.** Please flag that for reconciliation. We need the cost scope alongside the numbers. A difference in allocation rules could otherwise look like a difference in operating performance.
- D.** Include the version identifier as well. I will circulate the six-item request with definitions, owners, dates, and remaining gaps so both teams know exactly what has been agreed.

[Answers and explanations, page 137](#)

A Read the situation

LESSON 04 / SLIDE STORYLINES AND EXECUTIVE SYNTHESIS

Convert an analytical presentation into a supported recommendation with a specific request, visible limits, and an agreed test.

Twelve charts need one clear decision request

Analyst Jun has twelve charts about a proposed case-routing process but no clear recommendation. Engagement manager Sofia must prepare an executive discussion about a pilot. Walkthroughs suggest a possible benefit, but there is no live operating result. The proposal is a four-week pilot at one center with a \$20,000 budget request. Current median handling time is 12 minutes. Proposed success measures are a median of 10 minutes or less and an error rate no higher than 2%, using agreed definitions and eligible-case coverage. The committee is being asked to authorize the pilot, not full rollout.

People: Jun, Analyst; Sofia, Engagement manager.

Read the record

Choose one answer per question using the facts above.

1. What authorization is requested?

- A. A four-week, one-center pilot with a \$20,000 budget
- B. Immediate full rollout
- C. An unlimited implementation budget
- D. A guarantee of future savings

2. What evidence exists so far?

- A. A completed successful live pilot
- B. A verified reduction to ten minutes
- C. A proven zero-error rollout
- D. Walkthroughs suggesting a possible benefit, with no live operating result

3. What are the proposed success measures?

- A. Any faster case regardless of error rate
- B. A larger chart count
- C. Median handling time at most 10 minutes and error rate at most 2%
- D. Average time below twelve with errors ignored

[Answers and explanations, page 138](#)

B Vocabulary in use

CORE TERMS

storyline

The logical sequence connecting a presentation's messages.

build the storyline

governing message

The central point organizing the supporting argument.

state the governing message

exhibit

A chart, table, or other analytical display.

reference the exhibit

insight

An interpretation explaining why a finding matters.

develop an insight

recommendation

A proposed course of action with its supporting basis.

make a recommendation

supporting evidence

Information used to substantiate a statement.

present supporting evidence

executive synthesis

A concise integration of findings and implications for a decision.

prepare an executive synthesis

action title

A slide heading expressing its key conclusion or implication.

use an action title

finding

An observation established by the analysis.

state the finding

implication

A consequence or significance for the decision.

explain the implication

decision ask

The specific authorization or choice requested from the audience.

clarify the decision ask

evidence chain

The connection from source information through findings to a conclusion.

check the evidence chain

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

storyline **STORYLINE**

build the storyline

Keep the meaning precise: The logical sequence connecting a presentation's messages.

finding **FINDING**

state the finding

Keep the meaning precise: An observation established by the analysis.

B Precision and professional shorthand

EXTEND YOUR RANGE

caveat

A material limitation or condition on a claim.
retain the caveat

appendix

Supporting detail placed after the main material.
move detail to the appendix

visual hierarchy

The arrangement that signals the relative importance of displayed information.
improve the visual hierarchy

denominator

The total underlying a proportion or rate.
state the denominator

pilot

A limited test of an approach before a wider decision.
authorize a pilot

success criterion

A specified condition used to judge the result.
agree success criteria

main body

The principal part of a presentation, excluding supporting appendices.
keep limits in the main body

pre-read

Material distributed for review before a meeting.
circulate the pre-read

chart annotation

A note explaining a feature or limit of a chart.
add a chart annotation

median

The middle value in ordered observations, or the midpoint of two middle values.
report the median

guardrail

A defined limit intended to prevent an unacceptable side effect.
set a quality guardrail

rollout decision

A choice about extending an approach beyond the initial test.
separate the rollout decision

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

evidence chain EVIDENCE CHAIN

check the evidence chain

Keep the meaning precise: The connection from source information through findings to a conclusion.

visual hierarchy VISUAL HIERARCHY

improve the visual hierarchy

Keep the meaning precise: The arrangement that signals the relative importance of displayed information.

C Phrases that move the work forward

Lead with the request

We recommend a four-week pilot at one center.

Limit the authorization

We are not asking for full rollout today.

Explain the implication

That supports a bounded test, not a claim of proven operating improvement.

Name the proposed threshold

The pilot target is a median of ten minutes or less.

Define the measurement

Specify eligible cases, the error numerator, and the denominator before launch.

Connect the argument

What does this exhibit change about the decision?

Move supporting detail

Put the calculation detail in the appendix, with a clear reference.

Separate later decisions

A wider rollout requires a subsequent review and authorization.

State the amount

The budget request is twenty thousand dollars.

State the evidence level

Walkthroughs suggest a possible benefit; live results are not yet available.

Name the current measure

The current median handling time is twelve minutes.

Preserve quality

The error rate must be no higher than two percent under the agreed definition.

Improve the heading

Make the slide title state the finding, not just the chart topic.

Keep the caveat visible

The lack of live evidence belongs in the main presentation.

Avoid selective emphasis

Show the quality measure alongside the speed result.

Close the presentation

Ask the committee to approve the pilot scope, budget, and measurement plan.

Precision in real exchanges

Purpose: State the evidence level

Useful wording: Walkthroughs suggest a possible benefit; live results are not yet available.

Purpose: Explain the implication

Useful wording: That supports a bounded test, not a claim of proven operating improvement.

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which opening is decision-focused and accurate?

- A.** Handling time has already fallen to ten minutes.
- B.** We have no request but many interesting graphs.
- C.** Approve a four-week, one-center pilot for \$20,000 to test the proposed process.
- D.** These twelve charts prove full rollout will succeed.

2. Which statement belongs in the main presentation?

- A.** A hidden claim that the pilot is already complete
- B.** No live operating result is available yet.
- C.** Only the file naming convention
- D.** Every calculation row regardless of relevance

3. A colleague needs the term for this meaning: A slide heading expressing its key conclusion or implication. Which term fits?

- A.** recommendation
- B.** action title
- C.** pilot
- D.** appendix

D Choose the response that fits / continued

4. Rebuild the exchange from "Twelve charts need one clear decision request". Jun: "Then the next page should explain why testing is reasonable and what uncertainty the pilot would address." Sofia: [missing response] Jun: "The current handling-time chart says twelve minutes. I need to label that as the median, not just call it the average." Which response belongs in the gap?

- A.** Yes, preserve the median. The proposed threshold is ten minutes or less on the same defined measure. Do not make a target sound like an achieved result or a promise about every individual case.
- B.** That gives us a storyline. Each exhibit should serve that argument. If a chart does not affect the decision or explain the test, it probably does not need equal time in the meeting.
- C.** Exactly. State the success criteria and measurement plan up front. The numerator, denominator, and case coverage need to be clear so the committee knows what a favorable result would actually mean.
- D.** Bring the guardrail alongside it. The proposed error rate must be no higher than two percent under the agreed definition. Faster work is not enough if quality deteriorates beyond that limit.

[Answers and explanations, page 138](#)

One useful distinction

Twelve minutes is the current median, not necessarily the mean. Ten minutes is a proposed threshold, not an achieved result. The 2% error guardrail needs a defined numerator, denominator, and eligible-case population so faster work does not conceal a quality problem.

E Conversation

Twelve charts need one clear decision request

Twelve charts need one clear decision request

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

median / appendix / action title / storyline / executive synthesis / success criteria / recommendation / rollout decision / guardrail / decision ask

- 01 **Jun:** Twelve charts, and I still cannot tell what I want the committee to approve until the last slide. Can we rebuild the opening around the decision?
- 02 **Sofia:** Start with the ¹ _____. We want authorization for a four-week pilot at one center, with a twenty-thousand-dollar budget. The audience should not have to infer that from the exhibits.
- 03 **Jun:** Should the opening say the new routing process will reduce handling time, or is that stronger than our evidence supports?
- 04 **Sofia:** Keep the ² _____ bounded. Walkthroughs suggest a possible benefit, but there is no live operating result yet. We recommend testing the process, not claiming that the improvement has already happened.
- 05 **Jun:** Then the next page should explain why testing is reasonable and what uncertainty the pilot would address.
- 06 **Sofia:** That gives us a ³ _____. Each exhibit should serve that argument. If a chart does not affect the decision or explain the test, it probably does not need equal time in the meeting.

E Conversation / continued

- 07 **Jun:** The current handling-time chart says twelve minutes. I need to label that as the median, not just call it the average.
- 08 **Sofia:** Yes, preserve the ⁴ _____. The proposed threshold is ten minutes or less on the same defined measure. Do not make a target sound like an achieved result or a promise about every individual case.
- 09 **Jun:** The error measure is on a separate page. The committee might hear the faster-time target and miss the quality condition.
- 10 **Sofia:** Bring the ⁵ _____ alongside it. The proposed error rate must be no higher than two percent under the agreed definition. Faster work is not enough if quality deteriorates beyond that limit.

Conversation continues on the next page.

Twelve charts need one clear decision request

CONVERSATION / CONTINUED

- 11 **Jun:** We should define eligible cases and how errors are counted before launching, rather than adjust the measures after seeing the result.
- 12 **Sofia:** Exactly. State the ⁶ _____ and measurement plan up front. The numerator, denominator, and case coverage need to be clear so the committee knows what a favorable result would actually mean.
- 13 **Jun:** My title just says Routing Analysis. It tells them the topic, but not what the walkthrough found or why we still need a pilot.
- 14 **Sofia:** Use an ⁷ _____ that communicates the implication accurately. For example, the evidence supports a limited live test. The heading must not imply proven improvement while the detail says otherwise.
- 15 **Jun:** I can move the detailed walkthrough calculations behind the main story, with a reference for anyone who wants to inspect them.
- 16 **Sofia:** The ⁸ _____ is appropriate for that detail. But keep the lack of live results and the quality condition in the main presentation, because they change how the recommendation should be understood.
- 17 **Jun:** If the committee approves the pilot, the minutes should not say that it approved the entire new operating model.
- 18 **Sofia:** Correct. A ⁹ _____ comes later, after the relevant results and review. We should state that distinction in both the request and the closing summary.
- 19 **Jun:** I will reorder the deck around the request, evidence, proposed test, and decision conditions, with the detailed calculations available separately.
- 20 **Sofia:** That is an ¹⁰ _____. It is shorter because the argument is organized, not because important uncertainty has been removed.

CHECK THE GAPS

1. decision ask / 2. recommendation / 3. storyline / 4. median / 5. guardrail / 6. success criteria / 7. action title / 8. appendix / 9. rollout decision / 10. executive synthesis

[Why these answers fit, page 139](#)

F Check accuracy and scope

Twelve charts need one clear decision request

Return to the case

Analyst Jun has twelve charts about a proposed case-routing process but no clear recommendation. Engagement manager Sofia must prepare an executive discussion about a pilot. Walkthroughs suggest a possible benefit, but there is no live operating result. The proposal is a four-week pilot at one center with a \$20,000 budget request. Current median handling time is 12 minutes. Proposed success measures are a median of 10 minutes or less and an error rate no higher than 2%, using agreed definitions and eligible-case coverage. The committee is being asked to authorize the pilot, not full rollout.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. Which comparison preserves the metric?

- A. Two minutes saved on every individual case
- B. Current median 12 minutes; proposed pilot threshold at most 10 minutes
- C. Current mean 12 minutes because median means average in every sense
- D. Guaranteed ten-minute result for every case

2. What prevents speed from becoming the only success measure?

- A. Count only cases with good outcomes.
- B. Report the defined error-rate guardrail alongside handling time.
- C. Remove error data from the deck.
- D. Treat a faster median as automatic quality improvement.

[Answers and explanations, page 141](#)

Listen for the distinction

Check all ten gaps. Reread the median-time target and error ceiling together so neither sounds optional.

Concise does not mean unqualified

A senior audience may interrupt a long tour of the analysis to ask what it should do. Lead with the requested decision, then give the evidence and material limits. Put supporting detail in the appendix, but keep information that changes the decision visible in the main presentation.

F Say it / transfer to a new case

State another bounded pilot request

A team proposes a three-week trial at two branches with a \$12,000 budget. No live results exist. The committee is asked to authorize the trial only; broader rollout requires another decision.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

\$12,000 / two branches / another decision / three weeks

- 01 **Presenter:** The proposed duration is ¹ _____.
- 02 **Chair:** The trial covers ² _____.
- 03 **Presenter:** The budget request is ³ _____.
- 04 **Chair:** Broader rollout requires ⁴ _____.

CHECK THE GAPS

1. three weeks / 2. two branches / 3. \$12,000 / 4. another decision

[Why these answers fit, page 141](#)

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "Twelve charts need one clear decision request". Jun: "My title just says Routing Analysis. It tells them the topic, but not what the walkthrough found or why we still need a pilot." Sofia: [missing response] Jun: "I can move the detailed walkthrough calculations behind the main story, with a reference for anyone who wants to inspect them." Which response belongs in the gap?

- A.** Use an action title that communicates the implication accurately. For example, the evidence supports a limited live test. The heading must not imply proven improvement while the detail says otherwise.
- B.** Bring the guardrail alongside it. The proposed error rate must be no higher than two percent under the agreed definition. Faster work is not enough if quality deteriorates beyond that limit.
- C.** Keep the recommendation bounded. Walkthroughs suggest a possible benefit, but there is no live operating result yet. We recommend testing the process, not claiming that the improvement has already happened.
- D.** Start with the decision ask. We want authorization for a four-week pilot at one center, with a twenty-thousand-dollar budget. The audience should not have to infer that from the exhibits.

[Answers and explanations, page 142](#)

Review 2 / Meaning and context

Use language from the lessons you have completed. Choose one answer per question.

Case file

Revisit "Data Requests and Client Burden" and "Slide Storylines and Executive Synthesis". Choose precise terminology, then reconstruct the missing responses using both neighboring turns. The final two questions also revisit earlier conversations.

1. A colleague needs the term for this meaning: The smallest adequate set of information for a defined initial analysis. Which term fits?

- A. reconciliation
- B. request dependency
- C. reporting period
- D. minimum viable dataset

2. A colleague needs the term for this meaning: A consequence or significance for the decision. Which term fits?

- A. storyline
- B. implication
- C. caveat
- D. denominator

3. Rebuild the exchange from "A frequent complaint is not yet the cause of churn". Ada: "We sometimes call our trees MECE. That could be misleading if we use the label to suggest that these customer experiences cannot coexist." Karim: [missing response] Ada: "For price, we could check the amounts customers actually paid and whether a change occurred before cancellation." Which response belongs in the gap?

- A. Treat MECE as a structuring check, not a substitute for understanding the data. Define the coding and identify gaps or overlaps instead of forcing complex departures into artificial single-cause boxes.
- B. Good. Set each analytical priority with an evidence source and owner. The initial hypothesis should help us learn faster, not make the team resistant to what the next analysis finds.
- C. Then disclose the overlap. Those are topic mentions, not separate groups of departing accounts. A clean-looking chart must not imply that the categories are mutually exclusive when they are not.
- D. Make it a hypothesis, not a finding about cause. We have twenty volunteer interviews from sixty departures, and the way people entered that sample could affect what we hear.

Review 2 / Meaning and context / continued

4. Rebuild the exchange from "Twelve charts need one clear decision request". Jun: "If the committee approves the pilot, the minutes should not say that it approved the entire new operating model." Sofia: [missing response] Jun: "I will reorder the deck around the request, evidence, proposed test, and decision conditions, with the detailed calculations available separately." Which response belongs in the gap?

- A.** Keep the recommendation bounded. Walkthroughs suggest a possible benefit, but there is no live operating result yet. We recommend testing the process, not claiming that the improvement has already happened.
- B.** Start with the decision ask. We want authorization for a four-week pilot at one center, with a twenty-thousand-dollar budget. The audience should not have to infer that from the exhibits.
- C.** Correct. A rollout decision comes later, after the relevant results and review. We should state that distinction in both the request and the closing summary.
- D.** Use an action title that communicates the implication accurately. For example, the evidence supports a limited live test. The heading must not imply proven improvement while the detail says otherwise.

[Answers and explanations, page 166](#)

A Read the situation

LESSON 05 / SCOPE MANAGEMENT AND CHANGE REQUESTS

Respond constructively to additional work by distinguishing the agreed scope from the proposed change and explaining options without premature commitments.

A second market is a new request, not a free extension

Engagement C18 covers a six-week study of Market A for a fixed \$60,000 fee. At the end of week three, client sponsor Helen asks for the same full study of Market B by the original deadline. The current team cannot complete both full studies in the remaining time. Consultant Raj can prepare options: additional resources subject to availability, an extension, a narrower Market B scan, or deferral. Fees and dates for the change are not yet assessed. The signed terms require an agreed written change before extra work begins. Helen has not approved a change.

People: Helen, Client sponsor; Raj, Engagement manager.

Read the record

Choose one answer per question using the facts above.

1. What does the signed engagement currently cover?

- A. A completed Market B study
- B. A six-week study of Market A for \$60,000
- C. Full studies of both markets for the same fee
- D. An unlimited number of markets

2. Can the current team finish both full studies by the original deadline?

- A. Yes, without changing anything.
- B. Only if the team labels Market B as Market A.
- C. No, not under the stated capacity.
- D. Yes, because the request came from the sponsor.

3. What must precede extra work?

- A. The consultant's unilateral fee decision
- B. An agreed written change under the signed terms
- C. An informal assumption of future approval
- D. A completed invoice after unapproved work

[Answers and explanations, page 143](#)

B Vocabulary in use

CORE TERMS

scope baseline

The agreed work boundaries against which changes are assessed.

protect the scope baseline

fixed fee

A specified charge for a defined scope under the agreement.

confirm the fixed fee

scope creep

Uncontrolled growth in work beyond the agreed scope.

prevent scope creep

resource capacity

The work a team can perform with its available people and time.

assess resource capacity

deliverable

A specified output to be supplied.

define the deliverable

change authorization

Formal permission for the specified change.

obtain change authorization

statement of work

A document specifying the work, outputs, and relevant engagement terms.

review the statement of work

change request

A proposal to alter agreed work or arrangements.

raise a change request

impact assessment

Examination of a proposed change's consequences.

complete an impact assessment

resource availability

Whether suitable people or other resources can be assigned when needed.

check resource availability

acceptance criterion

A condition used to determine whether an output meets the agreement.

agree acceptance criteria

commercial terms

Agreed conditions concerning fees and other business arrangements.

confirm commercial terms

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

scope baseline SCOPE BASELINE

protect the scope baseline

Keep the meaning precise: The agreed work boundaries against which changes are assessed.

impact assessment IMPACT ASSESSMENT

complete an impact assessment

Keep the meaning precise: Examination of a proposed change's consequences.

B Precision and professional shorthand

EXTEND YOUR RANGE

schedule extension

An approved increase in the time allowed.
propose a schedule extension

high-level scan

A limited overview rather than a full detailed study.
offer a high-level scan

assumption log

A record of conditions used in planning or analysis.
update the assumption log

rework

Work needed to revise or repeat previous output.
estimate rework

pending approval

Awaiting the relevant authorized decision.
mark the change pending approval

out-of-scope request

A request beyond the currently agreed work.
assess an out-of-scope request

scope trade-off

Exchanging one work element for another under agreed conditions.
explain a scope trade-off

depth of analysis

The detail and rigor of examination provided.
specify the depth of analysis

dependency

A condition or task on which another depends.
identify a dependency

change register

A record of requested changes and their status.
maintain the change register

deferral

Moving a decision or activity to a later time.
propose deferral

written variation

A documented agreed change to specified engagement terms.
execute a written variation

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

commercial terms COMMERCIAL TERMS

confirm commercial terms

Keep the meaning precise: Agreed conditions concerning fees and other business arrangements.

assumption log ASSUMPTION LOG

update the assumption log

Keep the meaning precise: A record of conditions used in planning or analysis.

Phrases that move the work forward

Acknowledge the purpose

I understand why Market B has become important.

Name the additional request

A full Market B study is a change to that scope.

Offer assessment

We can assess options for resources, timing, and analytical depth.

Check people before promising

Additional resources depend on suitable people being available.

Distinguish a smaller product

A high-level scan would have narrower coverage than a full study.

Preserve existing commitments

We should show what each option does to Market A.

Keep status accurate

The request is being assessed, not yet approved.

Record the decision

Capture the chosen scope, fee, dates, and responsibilities in the variation.

State the current agreement

The signed scope covers the six-week Market A study.

Describe capacity honestly

The current team cannot complete both full studies by the existing deadline.

Avoid an early quote

The revised fee and dates have not yet been assessed.

Explain an extension

More time is one option, subject to agreement.

Offer deferral

We could schedule Market B as a later phase.

State the approval condition

The terms require an agreed written change before extra work starts.

Define acceptance

Agree what the revised deliverable must contain.

Close without overpromising

I will return with assessed choices rather than commit to an unsupported deadline.

Precision in real exchanges

Purpose: Describe capacity honestly

Useful wording: The current team cannot complete both full studies by the existing deadline.

Purpose: Offer assessment

Useful wording: We can assess options for resources, timing, and analytical depth.

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which response is constructive and accurate?

- A.** We will invent a new fee after finishing.
- B.** We can assess ways to add Market B, but both full studies do not fit the current capacity and deadline.
- C.** Yes, both are included with no changes.
- D.** Every new client request must be refused.

2. Which statement about the scan is appropriate?

- A.** It is identical to a full study because the title is similar.
- B.** It needs no agreed deliverable.
- C.** Its limitations should be hidden in the appendix only.
- D.** Its reduced coverage and depth must be specified.

3. A colleague needs the term for this meaning: A proposal to alter agreed work or arrangements. Which term fits?

- A.** pending approval
- B.** change request
- C.** deliverable
- D.** high-level scan

D Choose the response that fits / continued

4. Rebuild the exchange from "A second market is a new request, not a free extension". Helen: "What options can you bring back? I would prefer choices to a simple statement that the request is outside scope." Raj: [missing response] Helen: "If you add people, can you guarantee that the final date stays unchanged?" Which response belongs in the gap?

- A.** Not before checking resource availability. We need suitable people at the right time, plus any coordination and review capacity. More names on a staffing plan do not automatically remove every dependency.
- B.** We will include acceptance criteria for that output. A shared definition of completion helps avoid a later disagreement over whether a preliminary overview was supposed to be a full market study.
- C.** I understand the need. Our scope baseline covers Market A at the fixed sixty-thousand-dollar fee. A full second study is additional work, so we need to assess how it would fit.
- D.** We can prepare an impact assessment. The options include additional resources if available, an extension, a narrower scan of Market B, or a later phase. Each has different implications.

[Answers and explanations, page 143](#)

One useful distinction

A fixed fee applies to the defined scope, not automatically to any additional request. The \$60,000 figure is the existing Market A fee. No price or delivery date has yet been established for Market B, and the exercise supplies no basis for inventing one.

Conversation

A second market is a new request, not a free extension

A second market is a new request, not a free extension

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

scope baseline / high-level scan / acceptance criteria / impact assessment /
resource availability / resource capacity / scope trade-off / change authorization /
change register / commercial terms

- 01 **Helen:** The board now wants Market B as well. Can you cover it to the same depth and keep our six-week presentation date?
- 02 **Raj:** I understand the need. Our ¹ _____ covers Market A at the fixed sixty-thousand-dollar fee. A full second study is additional work, so we need to assess how it would fit.
- 03 **Helen:** We are halfway through the engagement. I had hoped the team could reuse enough of the approach to keep the original date.
- 04 **Raj:** Reuse may help, but the current ² _____ does not support both full studies in the remaining time. I do not want to promise a date that depends on work we have not resourced.
- 05 **Helen:** What options can you bring back? I would prefer choices to a simple statement that the request is outside scope.
- 06 **Raj:** We can prepare an ³ _____. The options include additional resources if available, an extension, a narrower scan of Market B, or a later phase. Each has different implications.

E Conversation / continued

- 07 **Helen:** If you add people, can you guarantee that the final date stays unchanged?
- 08 **Raj:** Not before checking ⁴ _____. We need suitable people at the right time, plus any coordination and review capacity. More names on a staffing plan do not automatically remove every dependency.
- 09 **Helen:** We might accept less depth for Market B if it gives us an initial view before the committee meeting.
- 10 **Raj:** Then define a ⁵ _____ explicitly. We should agree the questions, evidence depth, exclusions, and output, rather than describe a smaller product as if it were the full study you originally requested.

Conversation continues on the next page.

A second market is a new request, not a free extension

CONVERSATION / CONTINUED

- 11 **Helen:** I also need to know whether any of these choices would weaken the work already promised for Market A.
- 12 **Raj:** That is part of the ⁶ _____. We will show what stays unchanged and what would move or reduce. The original commitments should not quietly disappear because the new request feels more urgent.
- 13 **Helen:** Could you at least get Market B started while I speak with procurement? I do not want us to lose another week waiting for signatures.
- 14 **Raj:** The signed terms require ⁷ _____ through an agreed written change before extra work starts. We can assess the request now, but we should not treat pending approval as permission to deliver it.
- 15 **Helen:** Understood. I have requested the change, not approved a revised fee or schedule. Those details still need to come back.
- 16 **Raj:** Correct. The ⁸ _____ and dates for Market B are not established yet. The existing fee is not an estimate for the extra work, and I will not invent one before the assessment.
- 17 **Helen:** If we choose the narrower scan, the document should say how we will judge whether it has met the agreed brief.
- 18 **Raj:** We will include ⁹ _____ for that output. A shared definition of completion helps avoid a later disagreement over whether a preliminary overview was supposed to be a full market study.

A second market is a new request, not a free extension / continued

- 19 **Helen:** Please bring back the options with their effects on Market A, the timing, and the approval needed for the selected route.
- 20 **Raj:** I will record the request in the ¹⁰ _____ and return with assessed choices. Once the authorized parties agree the written variation, we can plan the added work against the actual approved terms.

CHECK THE GAPS

1. scope baseline / **2.** resource capacity / **3.** impact assessment / **4.** resource availability / **5.** high-level scan / **6.** scope trade-off / **7.** change authorization / **8.** commercial terms / **9.** acceptance criteria / **10.** change register

[Why these answers fit, page 144](#)

F Check accuracy and scope

A second market is a new request, not a free extension

Return to the case

Engagement C18 covers a six-week study of Market A for a fixed \$60,000 fee. At the end of week three, client sponsor Helen asks for the same full study of Market B by the original deadline. The current team cannot complete both full studies in the remaining time. Consultant Raj can prepare options: additional resources subject to availability, an extension, a narrower Market B scan, or deferral. Fees and dates for the change are not yet assessed. The signed terms require an agreed written change before extra work begins. Helen has not approved a change.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. What is the status of Market B?

- A. Included in the original Market A scope
- B. Requested and awaiting assessment and written agreement
- C. Approved by the mere act of asking
- D. Already delivered

2. What should an impact assessment include?

- A. A guaranteed date before checking capacity
- B. A change in wording with no work consequences
- C. Effects on scope, people, fees, timing, and existing commitments
- D. Only whether the client sounds enthusiastic

[Answers and explanations, page 145](#)

Listen for the distinction

Correct all ten gaps. Reread the narrower-scan option and the exchange about starting before authorization.

A boundary is easier to accept with choices

A blunt refusal can miss an important client need, while an unqualified yes can create an impossible commitment. Acknowledge the purpose of the request, explain the current boundary and capacity, and offer options for an authorized decision. Keep assessment separate from approval.

F Say it / transfer to a new case

State another unapproved scope addition

A four-week engagement covers Region East for \$35,000. In week two, the client requests Region West as well. Extra work requires an agreed written variation. Its fee, staffing, and timing have not been assessed.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

Region East / \$35,000 / Region West / written variation

- 01 **Manager:** The current geographic scope is ¹ _____.
- 02 **Client:** The additional requested region is ² _____.
- 03 **Manager:** The existing fee is ³ _____.
- 04 **Client:** Extra work requires an agreed ⁴ _____.

CHECK THE GAPS

1. Region East / 2. Region West / 3. \$35,000 / 4. written variation

[Why these answers fit, page 146](#)

F Say it / transfer to a new case / continued

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "A second market is a new request, not a free extension".
Helen: "Could you at least get Market B started while I speak with procurement? I do not want us to lose another week waiting for signatures." **Raj:** [missing response] **Helen:** "Understood. I have requested the change, not approved a revised fee or schedule. Those details still need to come back." **Which response belongs in the gap?**

- A.** I will record the request in the change register and return with assessed choices. Once the authorized parties agree the written variation, we can plan the added work against the actual approved terms.
- B.** Correct. The commercial terms and dates for Market B are not established yet. The existing fee is not an estimate for the extra work, and I will not invent one before the assessment.
- C.** That is part of the scope trade-off. We will show what stays unchanged and what would move or reduce. The original commitments should not quietly disappear because the new request feels more urgent.
- D.** The signed terms require change authorization through an agreed written change before extra work starts. We can assess the request now, but we should not treat pending approval as permission to deliver it.

[Answers and explanations, page 147](#)

A Read the situation

LESSON 06 / DIFFICULT CLIENT FEEDBACK

Acknowledge a missed constraint, restate its effect on the recommendation, and agree a credible correction without becoming defensive or promising an untested solution.

The recommendation depends on staff the client does not have

Consultant Ronan recommends an eight-week pilot requiring two full-time-equivalent staff throughout. Client operations lead Leila points out that only 0.5 full-time equivalent is available during that period, with no additional hiring approved this quarter. Leila had supplied the limit in a discovery email dated 8 September, which the team missed. The proposed workload has not been redesigned. Ronan must own the oversight, correct the assumption, and assess a smaller scope or different timing. He commits to a revised assessment by Wednesday at 15:00 local time, not to a feasible launch by then.

People: Leila, Client operations lead; Ronan, Consultant.

Read the record

Choose one answer per question using the facts above.

1. What staffing did the recommendation assume?

- A. Two full-time equivalents for eight weeks
- B. Half a full-time equivalent for one day
- C. Unlimited approved hiring
- D. A completed capacity assessment

2. What staffing is actually available?

- A. Two full-time equivalents
- B. Four additional hires
- C. An unknown unlimited pool
- D. 0.5 full-time equivalent during the period

3. What is promised for Wednesday at 15:00?

- A. Proof that the original recommendation was feasible
- B. A revised assessment
- C. A guaranteed pilot launch
- D. Approved new hiring

[Answers and explanations, page 148](#)

B Vocabulary in use

CORE TERMS

client feedback

Information from the client about the work or its usefulness.

respond to client feedback

FTE

Full-time equivalent; capacity expressed relative to a defined full-time workload.

calculate available FTE

resourcing model

A representation of people, roles, and effort needed.

revise the resourcing model

feasibility

Whether an option can be carried out under relevant conditions.

reassess feasibility

fact check

Verification of a statement against relevant evidence.

complete a fact check

assumption register

A documented list of planning assumptions and their status.

update the assumption register

staffing constraint

A limit on the people or capacity available.

acknowledge a staffing constraint

capacity assumption

A planning belief about resources available for the work.

correct the capacity assumption

workload

The amount of work assigned or required.

assess the workload

oversight

A missed fact or step; in other contexts, supervisory responsibility.

acknowledge the oversight

discovery record

Information captured during the initial client inquiry.

review the discovery record

capacity gap

A difference between required and available resources.

quantify the capacity gap

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

client feedback **CLIENT FEEDBACK**

respond to client feedback

Keep the meaning precise: Information from the client about the work or its usefulness.

workload **WORKLOAD**

assess the workload

Keep the meaning precise: The amount of work assigned or required.

B Precision and professional shorthand

EXTEND YOUR RANGE

critical task

Work essential to the intended result or necessary sequence.

identify critical tasks

phasing

Dividing work into sequenced stages.

assess phased delivery

de-scoping

Removing work from the agreed or proposed scope through the relevant process.

make de-scoping explicit

hiring approval

Authorization to recruit or add the relevant staff.

confirm hiring approval

revision note

A record of what changed and why.

include a revision note

accountability

Responsibility for explaining and addressing one's work or decisions.

demonstrate accountability

bottleneck

A point limiting the rate or capacity of a process.

locate the bottleneck

scope reduction

A deliberate decrease in included work.

evaluate a scope reduction

schedule constraint

A limit on when work can occur or finish.

clarify schedule constraints

client sign-off

The client's relevant formal acceptance or approval.

obtain client sign-off

corrective action

A step addressing an identified problem or error.

agree corrective action

follow-through

Completion of agreed next steps.

maintain follow-through

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

capacity gap **CAPACITY GAP**

quantify the capacity gap

Keep the meaning precise: A difference between required and available resources.

de-scoping **DE-SCOPING**

make de-scoping explicit

Keep the meaning precise: Removing work from the agreed or proposed scope through the relevant process.

Phrases that move the work forward

Acknowledge the miss

You supplied the staffing limit, and we missed it.

Avoid a defensive qualifier

That omission is ours to correct.

Respect the hiring limit

No additional hiring is approved this quarter.

Avoid simple scaling

We cannot assume a quarter of the staff means a four-times-longer schedule.

Offer bounded alternatives

We will assess a smaller scope or different timing.

Avoid a promised solution

I cannot yet say which option will be feasible.

Correct the record

We will update the assumption register and mark the previous version as superseded.

Separate review from approval

Reviewing an option does not approve its staffing or launch.

State the consequence

Our recommendation depends on capacity that is not available.

Confirm the constraint

The available capacity is half an FTE for this period.

Quantify the gap

The proposal assumes one and a half FTE more than is available.

Review the work

We need to identify which tasks and dependencies are affected.

Keep the goal visible

Which parts of the pilot are essential to the decision it must support?

Set the next commitment

I will return with the revised assessment by Wednesday at fifteen hundred local time.

Invite factual verification

Please confirm that we have represented the capacity limit correctly.

Close with follow-through

The next version will state the constraint, its effects, and the assessed alternatives.

Precision in real exchanges

Purpose: Confirm the constraint

Useful wording: The available capacity is half an FTE for this period.

Purpose: Respect the hiring limit

Useful wording: No additional hiring is approved this quarter.

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which opening best addresses the feedback?

- A.** You supplied the limit, and we missed it; the recommendation needs revision.
- B.** You should have repeated the email more often.
- C.** The slide looks strong, so the constraint is irrelevant.
- D.** We can call two FTE half an FTE to resolve it.

2. What is the capacity gap?

- A.** 2.5 FTE
- B.** No gap
- C.** 1.5 FTE
- D.** 0.25 FTE

3. A colleague needs the term for this meaning: A planning belief about resources available for the work. Which term fits?

- A.** revision note
- B.** fact check
- C.** phasing
- D.** capacity assumption

D Choose the response that fits / continued

4. Rebuild the exchange from "The recommendation depends on staff the client does not have". Leila: "That is a large difference. I do not want a cosmetic change to the slide while the same workload remains underneath." Ronan: [missing response] Leila: "One suggestion was to stretch the pilot to four times the duration. That sounds neat on a spreadsheet. Does the work actually divide that way?" Which response belongs in the gap?

- A.** Any scope reduction needs a clear consequence statement. We should say which question the smaller test can answer and which part of the original ambition would remain untested.
- B.** That does not establish feasibility. Some tasks may need people together or depend on a particular sequence. We cannot infer a workable schedule solely by multiplying the duration.
- C.** Understood. Your factual review is not automatic client sign-off on a new staffing plan or launch. We will identify the actual approval route for whichever option proves supportable.
- D.** The capacity gap is one and a half FTE. We need to examine the work itself, not relabel the resource requirement or imply that the original plan fits.

[Answers and explanations, page 148](#)

One useful distinction

Two FTE required and 0.5 FTE available create a 1.5-FTE capacity gap. The available amount is one quarter of the assumed capacity. This does not automatically prove the pilot will take four times as long: tasks, sequencing, and minimum staffing may prevent simple scaling.

E Conversation

The recommendation depends on staff the client does not have

The recommendation depends on staff the client does not have

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

capacity gap / follow-through / feasibility / phasing / client sign-off / revision note /
resourcing model / capacity assumption / scope reduction / staffing constraint

- 01 **Leila:** This plan still needs two FTEs for eight weeks. My September eighth email said we have half an FTE. How did that constraint disappear from the recommendation?
- 02 **Ronan:** You did, and we missed that ¹ _____. Our recommendation depends on capacity you do not have. That omission is ours to correct, rather than something you should have had to raise again.
- 03 **Leila:** I need the team to understand that no extra hiring is approved this quarter. We cannot simply add people because the presentation assumes them.
- 04 **Ronan:** I will correct the ² _____ explicitly. The current proposal assumes two FTE, while only half an FTE is available during the period. Additional hiring cannot be treated as an agreed solution.
- 05 **Leila:** That is a large difference. I do not want a cosmetic change to the slide while the same workload remains underneath.
- 06 **Ronan:** The ³ _____ is one and a half FTE. We need to examine the work itself, not relabel the resource requirement or imply that the original plan fits.

E Conversation / continued

- 07 **Leila:** One suggestion was to stretch the pilot to four times the duration. That sounds neat on a spreadsheet. Does the work actually divide that way?
- 08 **Ronan:** That does not establish ⁴ _____. Some tasks may need people together or depend on a particular sequence. We cannot infer a workable schedule solely by multiplying the duration.
- 09 **Leila:** What will you check before bringing another option back? The operation still needs a useful answer, but the people limit is real.
- 10 **Ronan:** We will revisit the ⁵ _____. Identify the essential tasks, dependencies, and review effort, then assess what could be reduced, phased, or moved without disguising the effect on the pilot's purpose.

Conversation continues on the next page.

The recommendation depends on staff the client does not have

CONVERSATION / CONTINUED

- 11 **Leila:** A smaller pilot might be possible, provided it still tests something meaningful and does not leave the committee with an unusable result.
- 12 **Ronan:** Any ⁶ _____ needs a clear consequence statement. We should say which question the smaller test can answer and which part of the original ambition would remain untested.
- 13 **Leila:** There may also be a later period with different capacity, but I cannot promise those people now.
- 14 **Ronan:** We can assess that ⁷ _____ option with its conditions visible. We should not replace one unsupported staffing assumption with another about resources that may become available later.
- 15 **Leila:** When can I expect a revised assessment? Please distinguish that from telling the committee we have an approved launch plan.
- 16 **Ronan:** By Wednesday at fifteen hundred local time, I will provide the assessment and a ⁸ _____. It will state what changed, why it changed, and which feasibility or approval questions remain open.
- 17 **Leila:** I can check whether the next version accurately represents our capacity. That review will not authorize additional staffing.
- 18 **Ronan:** Understood. Your factual review is not automatic ⁹ _____ on a new staffing plan or launch. We will identify the actual approval route for whichever option proves supportable.

The recommendation depends on staff the client does not have / continued

- 19 **Leila:** Then please make sure the previous version is no longer circulated as the current recommendation.
- 20 **Ronan:** We will mark it superseded and maintain ¹⁰ _____. The next version will show the real constraint, the consequences for the work, and the assessed alternatives rather than repeat the original unsupported plan.

CHECK THE GAPS

1. staffing constraint / 2. capacity assumption / 3. capacity gap / 4. feasibility / 5. resourcing model / 6. scope reduction / 7. phasing / 8. revision note / 9. client sign-off / 10. follow-through

[Why these answers fit, page 149](#)

F Check accuracy and scope

The recommendation depends on staff the client does not have

Return to the case

Consultant Ronan recommends an eight-week pilot requiring two full-time-equivalent staff throughout. Client operations lead Leila points out that only 0.5 full-time equivalent is available during that period, with no additional hiring approved this quarter. Leila had supplied the limit in a discovery email dated 8 September, which the team missed. The proposed workload has not been redesigned. Ronan must own the oversight, correct the assumption, and assess a smaller scope or different timing. He commits to a revised assessment by Wednesday at 15:00 local time, not to a feasible launch by then.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. Why is multiplying the duration by four not a proven fix?

- A. The client has already approved a longer schedule.
- B. The two measures use no common workload basis.
- C. Task sequencing and minimum staffing may prevent simple proportional scaling.
- D. Arithmetic never matters in staffing.

2. Which follow-up statement is accurate?

- A. Hiring is approved because a revision is underway.
- B. The original version should remain the sole decision basis.
- C. A revised assessment will be supplied by the agreed time; launch feasibility remains to be established.
- D. The pilot is guaranteed to launch by Wednesday.

[Answers and explanations, page 150](#)

Listen for the distinction

Check all ten gaps. Reread the staffing arithmetic and explain why it does not establish a four-times-longer schedule.

Acknowledge before explaining

When feedback identifies a genuine omission, an immediate defense can make the client repeat the problem more forcefully. State what the team missed and its consequence first. Then clarify the constraint and the repair plan without turning the conversation into a search for someone else to blame.

F Say it / transfer to a new case

Correct another capacity assumption

A proposed review requires 1.5 FTE, but the client confirms only 0.5 FTE is available. No extra staffing is approved. The consultant promises a revised assessment on Friday, not a completed review.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

1.5 FTE / 1.0 FTE / revised assessment / 0.5 FTE

- 01 **Consultant:** The proposal assumed ¹ _____.
- 02 **Client:** Confirmed available capacity is ² _____.
- 03 **Consultant:** The resulting capacity gap is ³ _____.
- 04 **Client:** Friday's commitment is a ⁴ _____.

CHECK THE GAPS

1. 1.5 FTE / 2. 0.5 FTE / 3. 1.0 FTE / 4. revised assessment

[Why these answers fit, page 151](#)

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "The recommendation depends on staff the client does not have". Leila: "There may also be a later period with different capacity, but I cannot promise those people now." Ronan: [missing response] Leila: "When can I expect a revised assessment? Please distinguish that from telling the committee we have an approved launch plan." Which response belongs in the gap?

- A.** That does not establish feasibility. Some tasks may need people together or depend on a particular sequence. We cannot infer a workable schedule solely by multiplying the duration.
- B.** We can assess that phasing option with its conditions visible. We should not replace one unsupported staffing assumption with another about resources that may become available later.
- C.** Any scope reduction needs a clear consequence statement. We should say which question the smaller test can answer and which part of the original ambition would remain untested.
- D.** The capacity gap is one and a half FTE. We need to examine the work itself, not relabel the resource requirement or imply that the original plan fits.

[Answers and explanations, page 152](#)

Review 3 / Meaning and context

Use language from the lessons you have completed. Choose one answer per question.

Case file

Revisit "Scope Management and Change Requests" and "Difficult Client Feedback". Choose precise terminology, then reconstruct the missing responses using both neighboring turns. The final two questions also revisit earlier conversations.

1. A colleague needs the term for this meaning: A specified charge for a defined scope under the agreement. Which term fits?

- A. fixed fee
- B. change register
- C. resource availability
- D. scope trade-off

2. A colleague needs the term for this meaning: A missed fact or step; in other contexts, supervisory responsibility. Which term fits?

- A. oversight
- B. critical task
- C. client feedback
- D. hiring approval

3. Rebuild the exchange from "Twelve charts need one clear decision request". Jun: "The error measure is on a separate page. The committee might hear the faster-time target and miss the quality condition." Sofia: [missing response] Jun: "We should define eligible cases and how errors are counted before launching, rather than adjust the measures after seeing the result." Which response belongs in the gap?

- A. Exactly. State the success criteria and measurement plan up front. The numerator, denominator, and case coverage need to be clear so the committee knows what a favorable result would actually mean.
- B. Bring the guardrail alongside it. The proposed error rate must be no higher than two percent under the agreed definition. Faster work is not enough if quality deteriorates beyond that limit.
- C. Start with the decision ask. We want authorization for a four-week pilot at one center, with a twenty-thousand-dollar budget. The audience should not have to infer that from the exhibits.
- D. The appendix is appropriate for that detail. But keep the lack of live results and the quality condition in the main presentation, because they change how the recommendation should be understood.

Review 3 / Meaning and context / continued

4. Rebuild the exchange from "The recommendation depends on staff the client does not have". Leila: "I can check whether the next version accurately represents our capacity. That review will not authorize additional staffing." Ronan: [missing response] Leila: "Then please make sure the previous version is no longer circulated as the current recommendation." Which response belongs in the gap?

- A.** Understood. Your factual review is not automatic client sign-off on a new staffing plan or launch. We will identify the actual approval route for whichever option proves supportable.
- B.** The capacity gap is one and a half FTE. We need to examine the work itself, not relabel the resource requirement or imply that the original plan fits.
- C.** Any scope reduction needs a clear consequence statement. We should say which question the smaller test can answer and which part of the original ambition would remain untested.
- D.** That does not establish feasibility. Some tasks may need people together or depend on a particular sequence. We cannot infer a workable schedule solely by multiplying the duration.

[Answers and explanations, page 169](#)

A Read the situation

LESSON 07 / IMPLEMENTATION AND CHANGE MANAGEMENT

Explain implementation readiness using training, observed practice, operational cover, and ownership rather than treating communication as adoption.

Receiving the launch email is not readiness

A new approval process is scheduled to launch on Monday for 12 managers. All 12 received the announcement; 10 completed the required training, and 4 of those 10 have demonstrated the required tasks in supervised practice. The agreed launch conditions require every participating manager to complete training and demonstrated practice, with operational cover assigned. Eight managers have no verified practice result, two still need training, and cover has not been assigned. Change lead Imani and client process owner David must assess the gaps and seek an authorized revised launch plan, not label unassessed people incompetent.

People: Imani, Change lead; David, Client process owner.

Read the record

Choose one answer per question using the facts above.

1. How many managers have demonstrated the required tasks?

- A. Twelve
- B. Ten
- C. Eight
- D. Four

2. What remains unknown for eight managers?

- A. Their demonstrated-practice result
- B. Whether they received the announcement
- C. Whether every one is incompetent
- D. Whether all training is complete for all twelve

3. Which launch requirement is entirely unassigned?

- A. Operational cover
- B. The announcement recipient list
- C. The title of the process owner
- D. The four completed demonstrations

[Answers and explanations, page 153](#)

B Vocabulary in use

CORE TERMS

change management

Coordinated work helping an organization move to and sustain a different way of operating.

plan change management

go-live

The point when a process or system begins actual operation.

confirm go-live readiness

proficiency

Demonstrated ability to perform the relevant tasks to the required level.

verify proficiency

supervised practice

Task rehearsal with an appropriate person observing and supporting it.

arrange supervised practice

job aid

A concise reference supporting task performance.

supply a job aid

practice environment

A setting where tasks can be rehearsed without unintended live effects.

use a practice environment

implementation readiness

Evidence that the required conditions for starting an approach are met.

assess implementation readiness

adoption

Actual use of the intended way of working.

measure process adoption

training completion

Finishing the specified learning activity.

record training completion

role-based training

Learning tailored to the tasks and responsibilities of a role.

provide role-based training

dry run

A rehearsal before actual operation.

conduct a dry run

protected time

Time explicitly set aside from competing work for a specified activity.

allocate protected time

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

change management **CHANGE MANAGEMENT**

plan change management

Keep the meaning precise: Coordinated work helping an organization move to and sustain a different way of operating.

training completion **TRAINING COMPLETION**

record training completion

Keep the meaning precise: Finishing the specified learning activity.

B Precision and professional shorthand

EXTEND YOUR RANGE

operational cover

Arrangements maintaining normal work while people undertake another task.

assign operational cover

process owner

The person accountable for a defined process and its ongoing management.

confirm the process owner

readiness gate

A decision point requiring specified launch conditions to be checked.

apply the readiness gate

hypercare

A defined period of increased support after launch.

plan hypercare

reinforcement

Follow-up support that helps maintain a desired practice.

provide reinforcement

benefit realization

Achievement of intended value after a change, under defined measures.

track benefit realization

backfill

Replacement capacity for work someone cannot perform during an assignment or absence.

arrange backfill

change champion

A person helping colleagues understand and adopt an agreed change.

support change champions

support model

Arrangements for helping users and resolving problems.

define the support model

stabilization

Work to bring a new operation into a reliable ongoing state.

monitor stabilization

usage measure

An indicator of whether and how an approach is being used.

define usage measures

business-as-usual

Normal ongoing operations outside a temporary change effort.

maintain business-as-usual service

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

protected time PROTECTED TIME

allocate protected time

Keep the meaning precise: Time explicitly set aside from competing work for a specified activity.

readiness gate READINESS GATE

apply the readiness gate

Keep the meaning precise: A decision point requiring specified launch conditions to be checked.

Phrases that move the work forward

Separate communication from readiness

Everyone received the announcement, but the launch conditions are not met.

State the practice position

Four have demonstrated the required tasks.

Name the remaining training

Two managers still need the required training.

Ask about support

What protected time and practice support do the remaining managers need?

Avoid a blame label

We should not call a missing assessment resistance.

Assign ownership

The process owner needs to confirm the operational arrangements.

Measure actual use

Track the intended workflow after launch, not just attendance at training.

Reinforce the change

Review early issues and provide targeted follow-up support.

State the training position

Ten of the twelve managers completed training.

Describe missing evidence fairly

Eight have no verified practice result; that does not mean eight failed.

Identify the capacity condition

Operational cover has not yet been assigned.

Keep the gate explicit

Each participant must meet the agreed training and practice conditions.

Define a smaller launch

A staged start would need its own approved scope and cover.

Prepare assistance

Name the support contact and escalation route before go-live.

Keep benefits separate

Process use does not by itself prove that the expected benefit has occurred.

Close the readiness review

Present the gaps, owners, support needs, and revised decision to the authorized approver.

Precision in real exchanges

Purpose: Describe missing evidence fairly

Useful wording: Eight have no verified practice result; that does not mean eight failed.

Purpose: Name the remaining training

Useful wording: Two managers still need the required training.

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which readiness statement is accurate?

- A.** Training completion proves sustained adoption.
- B.** Four have demonstrated the tasks; eight lack verified practice results.
- C.** All twelve are ready because the email arrived.
- D.** Eight have failed an assessment.

2. Which next step addresses the stated gaps?

- A.** Arrange remaining training, supervised practice, and operational cover before seeking the launch decision.
- B.** Send the same email and declare the conditions met.
- C.** Remove the agreed gate without authorization.
- D.** Assume normal duties will cover themselves.

3. A colleague needs the term for this meaning: Actual use of the intended way of working. Which term fits?

- A.** job aid
- B.** process owner
- C.** adoption
- D.** reinforcement

D Choose the response that fits / continued

4. Rebuild the exchange from "Receiving the launch email is not readiness". David: "Two managers still need the training itself. Their teams have been busy, and they have not had time set aside." Imani: [missing response] David: "Even trained managers need an opportunity to practice. We should not assume that attendance establishes independent performance." Which response belongs in the gap?

- A.** It measures communication, not implementation readiness. Ten managers completed training, four demonstrated the required tasks, and operational cover is still unassigned. Those are separate conditions, not details the email resolves.
- B.** That is benefit realization. Keep those measures separate. For now, present the readiness gaps, owners, support needs, and proposed revision to the authorized approver instead of leaving Monday marked ready.
- C.** They need protected time and an agreed route to complete the requirement. Calling them resistant would not address the scheduling barrier or tell us whether they can perform the tasks.
- D.** Define the support model before go-live. A job aid, named contact, and clear escalation route can make assistance predictable, but they do not replace the required practice or operational cover.

[Answers and explanations, page 153](#)

One useful distinction

All 12 received the email, 10 completed training, and 4 demonstrated the tasks. These are different measures, not interchangeable adoption rates. Eight have no verified practice result; that is a readiness evidence gap, not evidence that eight people failed an assessment.

E Conversation

Receiving the launch email is not readiness

Receiving the launch email is not readiness

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

readiness gate / process owner / Training completion / operational cover /
benefit realization / protected time / adoption / support model / implementation readiness
/ supervised practice

- 01 **David:** The dashboard is green for Monday because all twelve managers got the announcement. That tells me the email went out. It does not tell me they can run the process.
- 02 **Imani:** It measures communication, not ¹ _____. Ten managers completed training, four demonstrated the required tasks, and operational cover is still unassigned. Those are separate conditions, not details the email resolves.
- 03 **David:** The four who demonstrated the tasks are among the ten trained managers. The other eight do not have a verified practice result.
- 04 **Imani:** Then say exactly that about ² _____. We should not describe eight people as having failed when they have not supplied a verified result. Missing evidence and demonstrated inability are different.
- 05 **David:** Two managers still need the training itself. Their teams have been busy, and they have not had time set aside.
- 06 **Imani:** They need ³ _____ and an agreed route to complete the requirement. Calling them resistant would not address the scheduling barrier or tell us whether they can perform the tasks.

Conversation / continued

- 07 **David:** Even trained managers need an opportunity to practice. We should not assume that attendance establishes independent performance.
- 08 **Imani:** Correct. ⁴ _____ is one condition. The agreed launch gate also requires demonstrated practice for each participating manager, plus cover for their normal responsibilities.
- 09 **David:** The cover issue worries me. If everyone practices at the same time, the existing approval queue still needs to be handled.
- 10 **Imani:** We need ⁵ _____ rather than hope the queue manages itself. Assign the people and timing explicitly, and check the consequences for ongoing service before confirming a launch arrangement.

Conversation continues on the next page.

Receiving the launch email is not readiness

CONVERSATION / CONTINUED

- 11 **David:** Would a phased start work? Four have completed the training and practice. Could they begin while we arrange preparation and cover for the other eight?
- 12 **Imani:** A staged start can be assessed at the ⁶ _____. It is not automatically approved. We would need a defined scope, cover, support, and the relevant authorization for that revised plan.
- 13 **David:** I will coordinate those operational arrangements. The change team can support the transition, but somebody in the business must own the process afterward.
- 14 **Imani:** That is the ⁷ _____ role. The handover should state who handles exceptions, maintains the instructions, and decides when an issue needs escalation after the project team steps back.
- 15 **David:** We also need a clear route for questions during the first days. People should not have to find the consultant who last answered an email.
- 16 **Imani:** Define the ⁸ _____ before go-live. A job aid, named contact, and clear escalation route can make assistance predictable, but they do not replace the required practice or operational cover.
- 17 **David:** Once the process starts, we should check whether managers use the intended workflow, rather than keep reporting training attendance as success.
- 18 **Imani:** Yes, measure ⁹ _____ in operation. Use the agreed workflow measures and investigate barriers fairly, without assuming every exception means someone is unwilling to change.

Receiving the launch email is not readiness / continued

- 19 **David:** And if usage improves, we still need to examine whether the change produces the expected service improvement.
- 20 **Imani:** That is ¹⁰ _____. Keep those measures separate. For now, present the readiness gaps, owners, support needs, and proposed revision to the authorized approver instead of leaving Monday marked ready.

CHECK THE GAPS

1. implementation readiness / 2. supervised practice / 3. protected time / 4. Training completion / 5. operational cover / 6. readiness gate / 7. process owner / 8. support model / 9. adoption / 10. benefit realization

[Why these answers fit, page 154](#)

F Check accuracy and scope

Receiving the launch email is not readiness

Return to the case

A new approval process is scheduled to launch on Monday for 12 managers. All 12 received the announcement; 10 completed the required training, and 4 of those 10 have demonstrated the required tasks in supervised practice. The agreed launch conditions require every participating manager to complete training and demonstrated practice, with operational cover assigned. Eight managers have no verified practice result, two still need training, and cover has not been assigned. Change lead Imani and client process owner David must assess the gaps and seek an authorized revised launch plan, not label unassessed people incompetent.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. What does a usage measure show?

- A. That all users can perform every task independently
- B. That the workflow has caused the expected service improvement
- C. That everyone who attended training has adopted the workflow
- D. Actual use of the defined workflow

2. How should a staged launch be described?

- A. A way to hide the eight missing results
- B. A guarantee that every service remains unaffected
- C. A possible revised plan requiring explicit scope, support, cover, and authorization
- D. Already approved because four people demonstrated tasks

[Answers and explanations, page 156](#)

Listen for the distinction

Check the ten gaps. Reread the four-of-twelve readiness position and the conditions on a phased start.

Readiness is not a character judgment

People may appear resistant when they lack time, practice, access, or support. Ask which prerequisite is missing before attributing motives. A visible gap can guide support and scheduling; it should not become a public ranking of people whose ability has not been assessed.

F Say it / transfer to a new case

Separate another set of readiness measures

Eight supervisors receive a process notice. Six complete training, and three of those six demonstrate the required tasks. Five have no verified practice result. A start still requires assigned cover and approval.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

no verified practice result / three supervisors / eight supervisors / six supervisors

- 01 **Lead:** The notice reached ¹ _____.
- 02 **Owner:** Training is complete for ² _____.
- 03 **Lead:** Verified task demonstrations total ³ _____.
- 04 **Owner:** The five others have ⁴ _____, not necessarily failed.

CHECK THE GAPS

1. eight supervisors / 2. six supervisors / 3. three supervisors / 4. no verified practice result

[Why these answers fit, page 156](#)

F Say it / transfer to a new case / continued

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "Receiving the launch email is not readiness". David: "I will coordinate those operational arrangements. The change team can support the transition, but somebody in the business must own the process afterward." Imani: [missing response] David: "We also need a clear route for questions during the first days. People should not have to find the consultant who last answered an email." Which response belongs in the gap?

- A.** That is the process owner role. The handover should state who handles exceptions, maintains the instructions, and decides when an issue needs escalation after the project team steps back.
- B.** It measures communication, not implementation readiness. Ten managers completed training, four demonstrated the required tasks, and operational cover is still unassigned. Those are separate conditions, not details the email resolves.
- C.** They need protected time and an agreed route to complete the requirement. Calling them resistant would not address the scheduling barrier or tell us whether they can perform the tasks.
- D.** We need operational cover rather than hope the queue manages itself. Assign the people and timing explicitly, and check the consequences for ongoing service before confirming a launch arrangement.

[Answers and explanations, page 157](#)

A Read the situation

LESSON 08 / STEERING COMMITTEES AND FINAL READOUTS

Close a divided decision meeting by summarizing trade-offs, distinguishing agreement from authorization, and recording the actual decision and owned follow-ups.

Agreement on the problem is not approval of an option

A steering committee agrees that service handoffs need improvement but is split between two proposals. Option A is estimated at six weeks and \$80,000, with manual reporting and staffing still to be confirmed. Option B is estimated at twelve weeks and \$140,000, with automated reporting dependent on an unverified system integration. With two minutes left, chair Marta defers the choice to Friday at 10:00 local time. Consultant Ethan will verify the integration position by Thursday at 12:00; operations lead Nora will confirm Option A staffing by the same time. Neither option nor additional implementation spending is approved.

People: Marta, Steering committee chair; Ethan, Consultant presenting the readout.

Read the record

Choose one answer per question using the facts above.

1. What does the committee agree on?

- A. Approval of Option A
- B. Approval of Option B
- C. Authorization of both budgets
- D. The need to improve service handoffs

2. What did Marta decide at the close?

- A. Authorize the consultant to choose privately
- B. Defer the option choice to Friday at 10:00 local time
- C. Approve automatic rollout that afternoon
- D. Remove every unresolved dependency

3. What must Ethan verify by Thursday at 12:00?

- A. Staffing for Option A on Nora's behalf
- B. A completed twelve-week implementation
- C. A guaranteed \$60,000 saving
- D. The system integration position for Option B

[Answers and explanations, page 158](#)

B Vocabulary in use

CORE TERMS

steering committee

A governance group overseeing direction and specified decisions.

brief the steering committee

decision log

A record of choices, authority, conditions, and dates.

maintain the decision log

consensus

Shared agreement, whose scope should be stated.

establish the scope of consensus

deferred decision

A choice moved to a later specified point.

document a deferred decision

endorsement

An expression of support that may differ from formal authorization.

clarify the endorsement

option appraisal

A structured comparison of alternatives.

complete the option appraisal

readout

A presentation of findings, status, or decisions.

deliver the final readout

minutes

The formal record of a meeting's relevant discussion and decisions.

confirm the minutes

dissent

A stated disagreement with a proposed view or choice.

record material dissent

conditional approval

Authorization that depends on stated conditions.

distinguish conditional approval

decision authority

The role or body permitted to make the relevant choice.

confirm decision authority

trade-off

A balance between competing benefits, costs, or conditions.

explain the trade-off

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

steering committee **STEERING COMMITTEE**

brief the steering committee

Keep the meaning precise: A governance group overseeing direction and specified decisions.

dissent **DISSENT**

record material dissent

Keep the meaning precise: A stated disagreement with a proposed view or choice.

B Precision and professional shorthand

EXTEND YOUR RANGE

implementation estimate

A projection of time or resources needed to execute an option.

qualify the implementation estimate

manual reporting

Reporting that requires human preparation rather than the proposed automation.

account for manual reporting

decision criterion

A factor used to compare and choose between options.

prioritize decision criteria

action owner

The person responsible for a defined next step.

name the action owner

decision pack

The material supplied to support a forthcoming choice.

update the decision pack

record correction

An amendment making a decision record accurate.

request a record correction

integration dependency

A reliance on connecting systems or processes successfully.

verify the integration dependency

automated reporting

Reporting produced through defined automated processes.

assess automated reporting

open item

A question or action not yet resolved.

track open items

due time

The specified time by which a follow-up is required.

confirm the due time

approval status

Whether and on what terms a proposal has been authorized.

state the approval status

handover

Transfer of relevant responsibility and information.

complete the decision handover

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

trade-off TRADE-OFF

explain the trade-off

Keep the meaning precise: A balance between competing benefits, costs, or conditions.

decision criterion DECISION CRITERION

prioritize decision criteria

Keep the meaning precise: A factor used to compare and choose between options.

Phrases that move the work forward

State the shared ground

We agree that the handoff problem needs to be addressed.

Compare the estimates

Option B is estimated at sixty thousand dollars more and six weeks longer.

Keep the dependency visible

The integration required for Option B has not been verified.

Respect the close

The chair has deferred the choice to Friday at ten hundred local time.

Assign the technical follow-up

Ethan will verify the integration position by Thursday at noon.

Keep spending status clear

No additional implementation spending has been approved.

Prepare the next discussion

Update the option comparison with the two follow-up results.

Read back the record

May I confirm the decision, owners, due times, and approval status?

Name the unresolved choice

We have not agreed which option to implement.

State the capability difference

Option A uses manual reporting; Option B proposes automated reporting.

Keep staffing provisional

Option A staffing still needs confirmation.

Avoid fictional approval

This is a deferred decision, not an approval subject to checks.

Assign the operational follow-up

Nora will confirm Option A staffing by the same deadline.

Preserve disagreement

Record the material trade-offs without claiming unanimous support for an option.

Clarify authority

The committee will make the option decision at the agreed meeting.

Close accurately

The problem is agreed, the option is deferred, and the next steps are assigned.

Precision in real exchanges

Purpose: State the capability difference

Useful wording: Option A uses manual reporting; Option B proposes automated reporting.

Purpose: Keep the dependency visible

Useful wording: The integration required for Option B has not been verified.

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which minute accurately records the meeting?

- A.** Both options were approved because the problem was agreed.
- B.** Option B was approved subject to integration checks.
- C.** The consultant may choose whichever option is easier.
- D.** The option decision is deferred to Friday at 10:00; neither option nor additional spending is approved.

2. What is Option B's estimated cost premium over A?

- A.** \$20,000
- B.** No difference
- C.** \$60,000
- D.** \$140,000

3. A colleague needs the term for this meaning: The formal record of a meeting's relevant discussion and decisions. Which term fits?

- A.** minutes
- B.** decision pack
- C.** manual reporting
- D.** endorsement

D Choose the response that fits / continued

4. Rebuild the exchange from "Agreement on the problem is not approval of an option". Marta: "So B is estimated to cost sixty thousand more and take six weeks longer. Its automation is not yet a confirmed capability." Ethan: [missing response] Marta: "Option A is not fully ready either. Nora still needs to confirm that the required staff can be assigned." Which response belongs in the gap?

- A.** Then the scope of consensus is the problem, not the solution. I will summarize the trade-off without presenting shared concern as approval of either proposal.
- B.** I will make the approval status explicit. Assigning evidence-gathering actions does not change the status of the implementation proposals or permit anyone to begin the added work.
- C.** The relevant dissent concerns priorities and evidence. We can summarize those differences accurately without claiming unanimity or attributing motives that members did not state.
- D.** Correct. The integration dependency remains unverified. We should not describe B as ready simply because automated reporting appears in the proposed design.

[Answers and explanations, page 158](#)

One useful distinction

Option B is estimated to cost \$60,000 more and take six weeks longer than Option A. Those differences do not establish that either is preferable. Reporting capability, staffing, integration, and the relative importance of the criteria remain material to the decision.

E Conversation

Agreement on the problem is not approval of an option

Agreement on the problem is not approval of an option

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

decision log / action owner / deferred decision / dissent / consensus /
integration dependency / option appraisal / trade-off / approval status / open item

- 01 **Marta:** Two minutes left. We agree the handoffs need fixing, but we have not agreed on A or B. I need a clean close, not a show of consensus we do not have.
- 02 **Ethan:** Then the scope of ¹ _____ is the problem, not the solution. I will summarize the trade-off without presenting shared concern as approval of either proposal.
- 03 **Marta:** Please keep the cost, timing, and reporting differences clear. The committee has heard many details and needs the comparison in one place.
- 04 **Ethan:** The ² _____ shows A at an estimated six weeks and eighty thousand dollars with manual reporting. B is estimated at twelve weeks and one hundred forty thousand with automated reporting.
- 05 **Marta:** So B is estimated to cost sixty thousand more and take six weeks longer. Its automation is not yet a confirmed capability.
- 06 **Ethan:** Correct. The ³ _____ remains unverified. We should not describe B as ready simply because automated reporting appears in the proposed design.

E Conversation / continued

- 07 **Marta:** Option A is not fully ready either. Nora still needs to confirm that the required staff can be assigned.
- 08 **Ethan:** That ⁴ _____ stays visible in the comparison. The shorter estimate does not establish that the people are available, just as B's design does not establish a working integration.
- 09 **Marta:** We do not have enough resolved information to choose now. I am deferring the option decision to Friday at ten hundred local time.
- 10 **Ethan:** I will record a ⁵ _____. Neither option is approved today, and no additional implementation spending is authorized. That is different from approving one option subject to a final check.

Conversation continues on the next page.

Agreement on the problem is not approval of an option

CONVERSATION / CONTINUED

- 11 **Marta:** Please do not write approved subject to confirmation. That would suggest we selected something today. We are deferring the choice, not attaching conditions to an approval.
- 12 **Ethan:** I will make the ⁶ _____ explicit. Assigning evidence-gathering actions does not change the status of the implementation proposals or permit anyone to begin the added work.
- 13 **Marta:** Ethan, please verify the integration position by Thursday at noon. Nora will confirm Option A staffing by the same time.
- 14 **Ethan:** I will list each ⁷ _____ separately. My follow-up is the integration position; Nora's is staffing. Both are due Thursday at twelve hundred local time for the updated decision material.
- 15 **Marta:** The next discussion should make clear what we gain and give up with each option, not just list two prices.
- 16 **Ethan:** We will preserve the ⁸ _____. The comparison should connect the cost and timing estimates to reporting capability, staffing, and integration, with any remaining uncertainty stated rather than hidden.
- 17 **Marta:** Some members favor speed, while others value automation more. Record that disagreement without presenting it as personal resistance.

Agreement on the problem is not approval of an option / continued

- 18 **Ethan:** The relevant ⁹ _____ concerns priorities and evidence. We can summarize those differences accurately without claiming unanimity or attributing motives that members did not state.
- 19 **Marta:** Read back the close now, so we can correct anything before the record circulates.
- 20 **Ethan:** The ¹⁰ _____ will show the agreed problem, the deferred option choice for Friday at ten, and the Thursday-noon integration and staffing follow-ups. Neither option nor extra implementation spending is approved.

CHECK THE GAPS

1. consensus / **2.** option appraisal / **3.** integration dependency / **4.** open item / **5.** deferred decision / **6.** approval status / **7.** action owner / **8.** trade-off / **9.** dissent / **10.** decision log

[Why these answers fit, page 159](#)

F Check accuracy and scope

Agreement on the problem is not approval of an option

Return to the case

A steering committee agrees that service handoffs need improvement but is split between two proposals. Option A is estimated at six weeks and \$80,000, with manual reporting and staffing still to be confirmed. Option B is estimated at twelve weeks and \$140,000, with automated reporting dependent on an unverified system integration. With two minutes left, chair Marta defers the choice to Friday at 10:00 local time. Consultant Ethan will verify the integration position by Thursday at 12:00; operations lead Nora will confirm Option A staffing by the same time. Neither option nor additional implementation spending is approved.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. Who owns Option A staffing confirmation?

- A. Nora
- B. Ethan
- C. Every committee member equally, with no named owner
- D. The system integration vendor by default

2. Which closing behavior is most useful?

- A. Describe silence as unanimous option approval.
- B. Remove dissent from the record to make it simpler.
- C. Present estimated timing as a guaranteed delivery date.
- D. Read back the unresolved choice, follow-up owners, deadlines, and approval status.

[Answers and explanations, page 160](#)

Listen for the distinction

Check the ten gaps. Reread the decision deferral and the Thursday evidence commitments before the Friday meeting.

An accurate close can preserve a difficult discussion

A presenter may want to leave a meeting with apparent agreement, especially after extensive work. Do not turn shared concern into a fictional approval. State the unresolved trade-off, the authorized next step, and the decision date so the discussion can advance without rewriting what happened.

F Say it / transfer to a new case

Record another deferred choice accurately

A committee agrees on a problem but defers the option choice to Tuesday at 09:00. Mei must confirm staffing by Monday at 13:00. No option or additional spending is approved.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

Mei / Tuesday at 09:00 / deferred / not approved

- 01 **Chair:** The option choice is ¹ _____.
- 02 **Presenter:** The next decision time is ² _____.
- 03 **Chair:** The staffing action owner is ³ _____.
- 04 **Presenter:** Additional spending is ⁴ _____.

CHECK THE GAPS

1. deferred / 2. Tuesday at 09:00 / 3. Mei / 4. not approved

[Why these answers fit, page 161](#)

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "Agreement on the problem is not approval of an option".
Marta: "Ethan, please verify the integration position by Thursday at noon. Nora will confirm Option A staffing by the same time." Ethan: [missing response] Marta: "The next discussion should make clear what we gain and give up with each option, not just list two prices." Which response belongs in the gap?

- A.** I will record a deferred decision. Neither option is approved today, and no additional implementation spending is authorized. That is different from approving one option subject to a final check.
- B.** I will list each action owner separately. My follow-up is the integration position; Nora's is staffing. Both are due Thursday at twelve hundred local time for the updated decision material.
- C.** The option appraisal shows A at an estimated six weeks and eighty thousand dollars with manual reporting. B is estimated at twelve weeks and one hundred forty thousand with automated reporting.
- D.** That open item stays visible in the comparison. The shorter estimate does not establish that the people are available, just as B's design does not establish a working integration.

[Answers and explanations, page 162](#)

Review 4 / Meaning and context

Use language from the lessons you have completed. Choose one answer per question.

Case file

Revisit "Implementation and Change Management" and "Steering Committees and Final Readouts". Choose precise terminology, then reconstruct the missing responses using both neighboring turns. The final two questions also revisit earlier conversations.

1. A colleague needs the term for this meaning: The point when a process or system begins actual operation. Which term fits?

- A. backfill
- B. role-based training
- C. go-live
- D. stabilization

2. A colleague needs the term for this meaning: Authorization that depends on stated conditions. Which term fits?

- A. steering committee
- B. action owner
- C. conditional approval
- D. implementation estimate

3. Rebuild the exchange from "The recommendation depends on staff the client does not have". Leila: "What will you check before bringing another option back? The operation still needs a useful answer, but the people limit is real." Ronan: [missing response] Leila: "A smaller pilot might be possible, provided it still tests something meaningful and does not leave the committee with an unusable result." Which response belongs in the gap?

- A. We will mark it superseded and maintain follow-through. The next version will show the real constraint, the consequences for the work, and the assessed alternatives rather than repeat the original unsupported plan.
- B. By Wednesday at fifteen hundred local time, I will provide the assessment and a revision note. It will state what changed, why it changed, and which feasibility or approval questions remain open.
- C. We will revisit the resourcing model. Identify the essential tasks, dependencies, and review effort, then assess what could be reduced, phased, or moved without disguising the effect on the pilot's purpose.
- D. I will correct the capacity assumption explicitly. The current proposal assumes two FTE, while only half an FTE is available during the period. Additional hiring cannot be treated as an agreed solution.

Review 4 / Meaning and context / continued

4. Rebuild the exchange from "Agreement on the problem is not approval of an option". Marta: "Some members favor speed, while others value automation more. Record that disagreement without presenting it as personal resistance." Ethan: [missing response] Marta: "Read back the close now, so we can correct anything before the record circulates." Which response belongs in the gap?

- A.** I will make the approval status explicit. Assigning evidence-gathering actions does not change the status of the implementation proposals or permit anyone to begin the added work.
- B.** Correct. The integration dependency remains unverified. We should not describe B as ready simply because automated reporting appears in the proposed design.
- C.** Then the scope of consensus is the problem, not the solution. I will summarize the trade-off without presenting shared concern as approval of either proposal.
- D.** The relevant dissent concerns priorities and evidence. We can summarize those differences accurately without claiming unanimity or attributing motives that members did not state.

[Answers and explanations, page 171](#)

Language for the next case

Reuse the method responsibly

confidential information

The unpublished site economics and distinctive operating-model details are protected former-client information under the supplied policy; removing a name does not give permission to reuse them.

Arun: Not on that basis. The confidential information includes the site economics and the way the operation is configured, not just the name on the cover.

de-identification

De-identification reduces identifying details, but distinctive combinations may still reveal the former client; it also does not independently establish permission to reuse confidential material.

Arun: That is not reliable de-identification. Someone who knows the market could recognize the combination. More importantly, disguising the material would not itself grant permission to use it.

source provenance

Source provenance records where an input came from; using the prospect's identified public report is different from silently importing another client's unpublished figures.

Arun: Yes. Preserve the source provenance for each factual statement. Do not carry across the former client's numbers and describe them as an industry benchmark.

reuse rights

Reuse rights determine what material may be used again and on what terms; creating a slide does not automatically authorize reuse of the client information it contains.

Arun: Your authorship does not settle reuse rights. We need to separate the general method from client data, protected analysis, and engagement-specific restrictions.

approved asset

An approved asset is material cleared for the intended reuse, such as the stipulated generic diagnostic template; its status must be checked rather than inferred from convenience.

Arun: Correct. Keep it within its authorized access boundary. Ask the knowledge manager which approved asset we can use. The generic diagnostic template is permitted under our policy.

client-reference permission

Client-reference permission governs using a client identity or engagement as a reference; it is separate from permission to reuse a method or confidential working materials.

Arun: Check the client-reference permission separately. An approved generic description may be possible, but a named logo, testimonial, or reference contact needs the applicable clearance.

Read the phrases aloud. Then complete the conversation on the following pages using the word bank.

Conversation

Reuse the method responsibly

Fictional policy permits a generic diagnostic template, but not a former client's confidential deck without permission. Nia created that deck using unpublished site economics and a distinctive operating model. Removing names is not clearance. The prospect permits use of its own supplied public report. A knowledge manager verifies reusable assets.

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

confidential information / approved asset / de-identification / source provenance /
client-reference permission / reuse rights

- 01 **Nia:** The prospect needs a proposal tomorrow. I have a strong diagnostic deck from my last engagement. Could I remove the client name and use its operating-model slides?
- 02 **Arun:** Not on that basis. The ¹ _____ includes the site economics and the way the operation is configured, not just the name on the cover.
- 03 **Nia:** I built those slides myself. I thought that made them our method rather than the client's information. The visual structure would save us a lot of time.
- 04 **Arun:** Your authorship does not settle ² _____. We need to separate the general method from client data, protected analysis, and engagement-specific restrictions.
- 05 **Nia:** What if I change the labels and round the figures? The prospect would not see the exact numbers or the locations.
- 06 **Arun:** That is not reliable ³ _____. Someone who knows the market could recognize the combination. More importantly, disguising the material would not itself grant permission to use it.

Conversation / continued

- 07 **Nia:** Then I should not attach the old deck to the proposal workspace while we decide. The prospect and its advisers have access there.
- 08 **Arun:** Correct. Keep it within its authorized access boundary. Ask the knowledge manager which ⁴ _____ we can use. The generic diagnostic template is permitted under our policy.
- 09 **Nia:** We can use that structure and populate it from the prospect's public report. They supplied it for this proposal, so we can identify the actual source.
- 10 **Arun:** Yes. Preserve the ⁵ _____ for each factual statement. Do not carry across the former client's numbers and describe them as an industry benchmark.

Conversation continues on the next page.

Reuse the method responsibly

CONVERSATION / CONTINUED

- 11 **Nia:** For the proposed analysis, I can describe the questions we would test rather than show a worked result from somebody else's business.
- 12 **Arun:** That is useful to the buyer. Show the decision, work stages, and intended outputs. A credible proposal does not need confidential proof from another engagement.
- 13 **Nia:** May we mention that our team has done a similar engagement? I do not want to imply that the former client endorses this proposal.
- 14 **Arun:** Check the ⁶ _____ separately. An approved generic description may be possible, but a named logo, testimonial, or reference contact needs the applicable clearance.
- 15 **Nia:** I will ask the knowledge manager for a cleared example. If none is available tonight, I can still show the planned approach without the old client's details.
- 16 **Arun:** Exactly. We should not make tomorrow's deadline a reason to assume permission. Use material we can substantiate and are authorized to share.
- 17 **Nia:** I will also remove the old-deck shortcut from this proposal's working folder. It points to the restricted engagement and could invite accidental sharing.
- 18 **Arun:** Good. Follow the access and records process without deleting the former engagement's required records. We are correcting the proposal workspace, not erasing the underlying work.
- 19 **Nia:** The revised proposal will use the approved template, the prospect's identified public figures, and a clearly labeled proposed method. No borrowed client economics or implied endorsement.
- 20 **Arun:** Send that version for review. We can demonstrate relevant experience while keeping methods, evidence, permissions, and client confidentiality clearly separated.

CHECK THE GAPS

1. confidential information / **2.** reuse rights / **3.** de-identification / **4.** approved asset / **5.** source provenance / **6.** client-reference permission

[Why these answers fit, page 174](#)

Choose material cleared for this pitch

An approved generic process template is reusable. A former client's confidential pricing table is not cleared. A new prospect has supplied its own published annual report for the pitch. No named client reference is authorized.

Complete the exchange using each phrase once. Read both roles, then switch roles and repeat with the bank covered.

WORD AND PHRASE BANK

template / confidential / report / authorized

- 01 **Consultant:** We can reuse the approved generic ¹ _____.
- 02 **Partner:** The old pricing table remains ² _____.
- 03 **Consultant:** New factual inputs can come from the prospect's published annual ³ _____.
- 04 **Partner:** A named client reference is not ⁴ _____.

CHECK THE GAPS

1. template / 2. confidential / 3. report / 4. authorized

[Why these answers fit, page 174](#)

Keep the distinction audible

Distinguish reusable methods from protected client material while keeping a proposal moving.

Language for the next case

Saved time is not all saved cash

capacity value

Capacity value converts released time into a monetary indicator, here 1,200 hours times 50 dollars equals 60,000; it is not by itself a reduction in spending.

Jon: Yes, because those measures overlap. Your capacity value is twelve hundred hours at fifty dollars. That describes resource capacity, not sixty thousand coming out of the payroll budget.

double counting

Double counting would add the overlapping time valuation and overtime saving as if they were independent benefits; the stated facts do not support an 80,000 combined saving.

Jon: Right. Avoid double counting. We can report released hours and the separate spending effect, with a clear explanation of their relationship.

run-rate benefit

The run-rate benefit expresses the recurring annual spending reduction at the assumed operating level; here it is 20,000, distinct from first-year net cash benefit after setup costs.

Jon: Describe that as the annual run-rate benefit, not guaranteed cash in every future year. Workload, staffing arrangements, and sustained adoption could change the result.

cash-releasing benefit

The cash-releasing benefit is the expected 20,000 reduction in overtime spending; unchanged regular payroll cannot be presented as another realized cash reduction.

Jon: Then the identified cash-releasing benefit is the twenty-thousand overtime reduction. It is part of the same improvement, not an unrelated saving to stack on the time valuation.

net cash benefit

Net cash benefit for the stipulated first year is 20,000 expected spending reduction minus 15,000 one-off implementation cost, or 5,000, before any other changes excluded by the exercise.

Jon: That is the projected net cash benefit. Keep the timing assumption beside it. Starting halfway through the year would not automatically produce a full year's reduction.

benefits owner

The benefits owner is accountable for tracking and supporting realization of the defined benefit; project completion alone does not establish that overtime spending has actually fallen.

Jon: Name a benefits owner in operations, with finance checking the spending evidence. We need the baseline, measurement period, and treatment of changes in workload.

Read the phrases aloud. Then complete the conversation on the following pages using the word bank.

Conversation

Saved time is not all saved cash

Fictional forecast: 1,200 hours released annually, valued at \$50/hour; regular payroll unchanged. Within this improvement, approved overtime reductions should cut annual spending \$20,000. Setup costs \$15,000 once. Assume a full first year of benefits and no other cost changes. No benefit has yet been realized.

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

cash-releasing benefit / run-rate benefit / net cash benefit / double counting /
benefits owner / capacity value

- 01 **Mina:** The benefits slide says sixty thousand of time savings plus twenty thousand less overtime. Before I use eighty thousand as the headline, can we check the bridge?
- 02 **Jon:** Yes, because those measures overlap. Your ¹ _____ is twelve hundred hours at fifty dollars. That describes resource capacity, not sixty thousand coming out of the payroll budget.
- 03 **Mina:** The regular team will stay employed on the same pay. They would use the released time to handle the backlog and reduce the extra hours.
- 04 **Jon:** Then the identified ² _____ is the twenty-thousand overtime reduction. It is part of the same improvement, not an unrelated saving to stack on the time valuation.
- 05 **Mina:** So the headline must not be eighty thousand. Nor should I call the whole sixty thousand cash saved when the regular salary payments stay the same.
- 06 **Jon:** Right. Avoid ³ _____. We can report released hours and the separate spending effect, with a clear explanation of their relationship.

Conversation / continued

- 07 **Mina:** For year one, the spending reduction is twenty thousand and implementation costs fifteen thousand. On our full-year assumption, that leaves five thousand.
- 08 **Jon:** That is the projected ⁴ _____. Keep the timing assumption beside it. Starting halfway through the year would not automatically produce a full year's reduction.
- 09 **Mina:** The following year's comparison would show twenty thousand before other changes, since the fifteen-thousand setup cost does not repeat under these assumptions.
- 10 **Jon:** Describe that as the annual ⁵ _____, not guaranteed cash in every future year. Workload, staffing arrangements, and sustained adoption could change the result.

Conversation continues on the next page.

Saved time is not all saved cash

CONVERSATION / CONTINUED

- 11 **Mina:** Who should confirm the overtime reduction after launch? The project team can count released hours, but it does not own payroll spending.
- 12 **Jon:** Name a ⁶ _____ in operations, with finance checking the spending evidence. We need the baseline, measurement period, and treatment of changes in workload.
- 13 **Mina:** Could a quiet month make the result look better even if the process had little effect? We should not attribute every payroll movement to this project.
- 14 **Jon:** Exactly. Compare like periods and document material changes. The bridge needs evidence of what changed and why, not just two totals with a saving label between them.
- 15 **Mina:** I will label the figures forecast, because the process has not gone live. Approval to reduce overtime is not proof that the lower spending has happened.
- 16 **Jon:** Good. When actual results arrive, reconcile them to the forecast and explain differences. Keep the released-capacity measure even if it is useful without becoming cash.
- 17 **Mina:** And we should not manufacture a forty-thousand noncash residual simply by subtracting twenty from sixty. The blended time valuation is not a payroll reconciliation.
- 18 **Jon:** Correct. The two indicators use different bases. Show the hours, valuation assumption, expected overtime reduction, and setup cost without pretending they form an additive accounting total.
- 19 **Mina:** The revised headline will be twelve hundred hours of projected capacity, with twenty thousand expected annual spending reduction and five thousand net cash benefit in the stipulated first year.
- 20 **Jon:** That is a decision-useful comparison. Attach the assumptions and owner, then let the client judge the benefit without an inflated total.

CHECK THE GAPS

1. capacity value / 2. cash-releasing benefit / 3. double counting / 4. net cash benefit / 5. run-rate benefit / 6. benefits owner

[Why these answers fit, page 176](#)

Reconcile a second business case

A proposed change releases 800 hours, valued at \$40 per hour. Within the same change, annual contractor spending is expected to fall \$12,000. One-off setup costs \$7,000. Assume full-year realization and no other changes. Regular payroll is unchanged.

Complete the exchange using each phrase once. Read both roles, then switch roles and repeat with the bank covered.

WORD AND PHRASE BANK

12 / 5 / 32 / double-count

- 01 **Consultant:** The capacity valuation is \$¹ _____ thousand.
- 02 **Finance:** The annual spending reduction is \$² _____ thousand.
- 03 **Consultant:** First-year net cash benefit is \$³ _____ thousand.
- 04 **Finance:** Adding the overlapping time and spending indicators would ⁴ _____ the benefit.

CHECK THE GAPS

1. 32 / 2. 12 / 3. 5 / 4. double-count

[Why these answers fit, page 176](#)

Keep the distinction audible

Explain a benefits bridge without adding overlapping measures or presenting estimates as achieved savings.

Language for the next case

Hand over a usable model

baseline case

The baseline case uses 2,000 units, price 30, variable unit cost 18, and fixed cost 15,000, giving 2,000 times 12 minus 15,000 equals 9,000.

Cass: Start from approved version one point four. The baseline case returns nine thousand: two thousand units at a twelve-dollar unit contribution, less fifteen thousand fixed cost.

sensitivity test

The sensitivity test varies volume alone to 1,800 units while holding the other inputs constant, producing 1,800 times 12 minus 15,000 equals 6,600.

Cass: Correct. This is a sensitivity test, not a forecast that demand will fall. It shows the output under one specified input change.

assumptions log

The assumptions log records the basis, owner, approval, and limitations of assumed inputs; it complements the source records and allows later users to understand choices.

Cass: Use the assumptions log. Record the basis, owner, approval, and known limitations. An assumption should not become a historical fact simply because it appears in a spreadsheet.

input register

The input register identifies the model's editable inputs, sources, units, and dates so an update can be traced rather than inferred from a cell's appearance.

Cass: Use the input guide, not color alone. The input register identifies sources, units, dates, and which values are assumptions rather than observations.

hard-code

To hard-code the output here means replacing the calculation with a fixed value, breaking the model's ability to respond consistently to changed inputs.

Cass: Exactly. Overwriting the output would hard-code the result and break the calculation. Keep formulas intact and check that updated inputs use the same units and period.

version control

Version control preserves identifiable model versions and a record of changes, allowing an approved baseline and subsequent updates to be distinguished and reviewed.

Cass: That is the purpose of version control. Follow your team's naming and access process, with the change, date, author, and review status recorded.

Read the phrases aloud. Then complete the conversation on the following pages using the word bank.

Conversation

Hand over a usable model

Fictional model v1.4: monthly contribution = units times (price minus variable unit cost), less fixed cost. Baseline: 2,000 units, \$30 price, \$18 variable cost, \$15,000 fixed cost; tax and financing excluded. Omar will maintain it. Handover tests reproduce the baseline and a 1,800-unit sensitivity, other inputs unchanged. Future enhancements are excluded.

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

assumptions log / input register / hard-code / baseline case / sensitivity test / version control

- 01 **Omar:** Before we sign off, I want to run the spreadsheet myself. Which version should I use, and what result should I reproduce?
- 02 **Cass:** Start from approved version one point four. The ¹ _____ returns nine thousand: two thousand units at a twelve-dollar unit contribution, less fifteen thousand fixed cost.
- 03 **Omar:** I get nine thousand too. The inputs are separate from the calculation sheet. Are the pale cells values I may change, or are some calculated outputs?
- 04 **Cass:** Use the input guide, not color alone. The ² _____ identifies sources, units, dates, and which values are assumptions rather than observations.
- 05 **Omar:** For the test, I will change volume to eighteen hundred and leave price, variable unit cost, and fixed cost untouched. That gives six thousand six hundred.
- 06 **Cass:** Correct. This is a ³ _____, not a forecast that demand will fall. It shows the output under one specified input change.

Conversation / continued

- 07 **Omar:** If the commercial team changes the price next month, I should enter the approved assumption in its input cell, not type over the contribution result.
- 08 **Cass:** Exactly. Overwriting the output would ⁴ _____ the result and break the calculation. Keep formulas intact and check that updated inputs use the same units and period.
- 09 **Omar:** Where should I record who approved a new price assumption? The source report alone might not explain why we used a particular estimate.
- 10 **Cass:** Use the ⁵ _____. Record the basis, owner, approval, and known limitations. An assumption should not become a historical fact simply because it appears in a spreadsheet.

Conversation continues on the next page.

Hand over a usable model

CONVERSATION / CONTINUED

- 11 **Omar:** I also see the notes exclude tax and financing. We must not label the nine-thousand baseline as net profit after all business costs.
- 12 **Cass:** Right. Call it the defined monthly contribution after the included fixed cost. The scope note explains what it includes and excludes; preserve that wording in extracted charts.
- 13 **Omar:** After testing, I will save the next working version separately. We need to be able to return to the approved baseline without guessing which file is current.
- 14 **Cass:** That is the purpose of ⁶ _____. Follow your team's naming and access process, with the change, date, author, and review status recorded.
- 15 **Omar:** Does signing the handover mean finance has approved the investment recommendation? I want the acceptance record to be precise about what we tested.
- 16 **Cass:** No. It confirms the agreed model delivery and handover checks, not approval of an investment or certainty about future results. Record the two reproduced outputs and any unresolved issues.
- 17 **Omar:** I can maintain the specified inputs. Adding another product and a different cost structure would need a design change, not just another column copied across.
- 18 **Cass:** Agreed. That enhancement is outside this handover. Route it through the agreed change process; do not assume ongoing development is included because the file is editable.
- 19 **Omar:** I will attach the baseline and sensitivity results, confirm ownership, and retain the input guide, assumptions log, limitations, and version history with the model.
- 20 **Cass:** Then the handover shows that you can operate the agreed model, not merely that an attachment arrived. We can record acceptance of that defined scope.

CHECK THE GAPS

1. baseline case / 2. input register / 3. sensitivity test / 4. hard-code / 5. assumptions log / 6. version control

[Why these answers fit, page 178](#)

Reproduce another contribution model

A model calculates monthly contribution as units times (price minus variable unit cost), less fixed cost. Inputs are 1,500 units, \$40 price, \$24 variable cost, and \$18,000 fixed cost. The sensitivity changes only units to 1,250. Tax and financing are excluded.

Complete the exchange using each phrase once. Read both roles, then switch roles and repeat with the bank covered.

WORD AND PHRASE BANK

6,000 / forecast / 16 / 2,000

- 01 **Analyst:** Unit contribution is \$¹ _____ before fixed cost.
- 02 **Consultant:** The baseline monthly result is \$² _____.
- 03 **Analyst:** The sensitivity result is \$³ _____.
- 04 **Consultant:** This sensitivity is not a demand ⁴ _____.

CHECK THE GAPS

1. 16 / 2. 6,000 / 3. 2,000 / 4. forecast

[Why these answers fit, page 178](#)

Keep the distinction audible

Walk a client through a reproducible model, controlled updates, and clearly bounded acceptance.

01 / Answers and explanations

A / Read the situation

A1. What must the executive committee decide?

A. Whether to centralize the two centers or retain them separately

The stated choice is centralization versus separate operation; no closure or staffing decision has been approved.

[Return to the exercise, page 4](#)

A2. When is the decision needed?

A. By 30 November

The brief gives 30 November as the executive committee's decision deadline.

[Return to the exercise, page 4](#)

A3. Which criteria belong in the comparison?

A. Cost, response time, and service continuity, including transition effects

The sponsor explicitly requires three criteria and transition effects, not a cost-only benchmark.

[Return to the exercise, page 4](#)

D / Response choices

D1. Which problem statement fits the brief?

C. Should North and South be centralized, given cost, response time, continuity, and transition effects?

The appropriate question preserves the actual alternatives and criteria without presuming an approval or result.

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D2. Which benchmark caveat matters?

B. Peer service scope and cost definitions may differ.

A useful peer comparison requires comparable boundaries and measures. Size, a common ratio, and a shared year do not by themselves align scope, complexity, or service hours.

[Return to the exercise, page 8](#)

01 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: The client representative supporting and directing the engagement within their role. Which term fits?

C. client sponsor

A Not here. operating model: How an organization arranges people, processes, systems, and responsibilities. The usual combination is "compare operating models".

B Not here. out-of-scope: Excluded from the agreed work boundaries. The usual combination is "identify out-of-scope work".

C Correct. client sponsor: The client representative supporting and directing the engagement within their role. The usual combination is "align with the client sponsor".

D Not here. service continuity: Maintaining the required service through an operating change. The usual combination is "assess service continuity".

[Return to the exercise, page 8](#)

D4. Rebuild the exchange from "The requested study is not the decision". Rita: "Agreed. Nothing has been approved. The executive committee needs a recommendation by the thirtieth of November." Owen: [missing response] Rita: "Cost matters, but we also need acceptable response times and continuity. A cheap arrangement that interrupts service would not solve the problem." Which response belongs in the gap?

D. I will record that decision deadline. We should also confirm who will supply information and when the committee needs material for its own review before that date.

A Not here. This line belongs to turn 14, after Rita says: "I can arrange access to the current service figures. Staffing and customer-impact information will take longer to obtain." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 2, after Rita says: "The committee keeps asking why our support centers cost so much. Could you give us a peer benchmark before the next decision meeting?" It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 18, after Rita says: "The committee will make the choice. I can sponsor the engagement and coordinate the inputs, but I cannot approve a closure myself." It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Owen's response in turn 6. It connects Rita's preceding point with Rita's follow-up. The committee needs the recommendation by 30 November, which guides evidence collection and review timing.

[Return to the exercise, page 8](#)

E / Conversation

1. peer group

Turn 2. The comparison organizations should fit the decision and relevant service characteristics, not merely be familiar names.

01 / Answers and explanations / continued

2. decision question

Turn 4. The actual choice is centralization versus separate operation; benchmarking supports that decision rather than replacing it.

3. decision deadline

Turn 6. The committee needs the recommendation by 30 November, which guides evidence collection and review timing.

4. decision criteria

Turn 8. Cost, response time, and continuity are the agreed comparison factors, including effects during transition.

5. transition cost

Turn 10. These costs arise during the change and must remain distinct from settled operating costs.

6. comparability

Turn 12. Different hours, case types, or cost definitions can distort an apparently simple peer comparison.

7. baseline

Turn 14. The baseline describes current operations; missing staffing and customer information must remain explicit.

8. in scope

Turn 16. The agreed analysis includes transition implications but does not automatically include a full implementation plan.

9. decision owner

Turn 18. The executive committee makes the choice; the sponsor coordinates without independently authorizing closure.

10. engagement charter

Turn 20. The charter records the shared purpose, boundaries, roles, and timing before detailed analysis begins.

[Return to the conversation, page 10](#)

01 / Answers and explanations / continued

F / Accuracy and scope

F1. What does the evidence gap mean?

B. Staffing and customer-impact information is still needed.

The gap identifies information required for the comparison without deciding the eventual recommendation.

[Return to the exercise, page 13](#)

F2. Which phrase preserves engagement authority?

A. This phase evaluates options; implementation requires a separate authorized decision.

An analytical engagement supports the client's decision but does not itself authorize implementation.

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F / Guided speaking

1. a new competition

Consultant: The actual alternatives are renewal or a new competition.

Turn 1. The price comparison supports this stated choice, not an already approved provider change.

2. procurement committee

Sponsor: The decision owner is the procurement committee.

Turn 2. The committee holds the stated decision role, while the sponsor supplies engagement direction.

3. 15 January

Consultant: The decision deadline is 15 January.

Turn 3. This date determines when the comparison must support the authorized choice.

4. transition risk

Sponsor: The comparison must include total cost, performance, and transition risk.

Turn 4. Transition risk is an explicit criterion alongside cost and service performance.

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01 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "The requested study is not the decision". Rita: "I can arrange access to the current service figures. Staffing and customer-impact information will take longer to obtain." Owen: [missing response] Rita: "Should the initial work include a detailed implementation plan, or would that get ahead of the decision?" Which response belongs in the gap?

B. Let us establish the baseline and list those gaps. We can plan the evidence work without filling missing figures with assumptions that look like confirmed client data.

A Not here. This line belongs to turn 2, after Rita says: "The committee keeps asking why our support centers cost so much. Could you give us a peer benchmark before the next decision meeting?" It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Owen's response in turn 14. It connects Rita's preceding point with Rita's follow-up. The baseline describes current operations; missing staffing and customer information must remain explicit.

C Not here. This line belongs to turn 18, after Rita says: "The committee will make the choice. I can sponsor the engagement and coordinate the inputs, but I cannot approve a closure myself." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 6, after Rita says: "Agreed. Nothing has been approved. The executive committee needs a recommendation by the thirtieth of November." It addresses that point, not the missing turn in the supplied exchange.

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02 / Answers and explanations

A / Read the situation

A1. How many departing accounts were interviewed?

B. Twenty of the sixty departing accounts

Twenty customers volunteered for interviews, while sixty accounts departed in total.

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A2. Why do the mentions add to more than twenty?

A. Respondents could mention multiple issues.

Multiple responses permit overlapping categories, so the mention counts need not sum to the number interviewed.

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A3. What has the team established about causation?

B. No causal driver has been isolated.

The brief explicitly leaves causal drivers unresolved despite the frequency of particular interview mentions.

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D / Response choices

D1. Which finding is supported?

C. Twelve of twenty volunteer interviewees mentioned price.

The supported statement retains the sample and what respondents said without converting mentions into causal proof.

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D2. Which follow-up best tests rather than protects the hypothesis?

D. Examine whether comparable accounts with similar price changes stayed.

Comparable retained accounts can challenge the explanation. Forced recoding changes the evidence; a different product line may be an unsuitable comparison; questioning only price complainants preserves selection bias.

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02 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: A coordinated part of the engagement's work. Which term fits?

A. workstream

A Correct. workstream: A coordinated part of the engagement's work. The usual combination is "assign a workstream".

B Not here. mention count: The number of recorded references to a specified topic. The usual combination is "report mention counts".

C Not here. alternative explanation: A different possible account of an observed result. The usual combination is "test alternative explanations".

D Not here. price sensitivity: Responsiveness to price changes under specified conditions. The usual combination is "examine price sensitivity".

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D4. Rebuild the exchange from "A frequent complaint is not yet the cause of churn". Ada: "Twelve out of twenty is sixty percent. I should say sixty percent of interviewees mentioned price, not sixty percent of departures were caused by price." Karim: [missing response] Ada: "How should I organize the next analysis without creating a huge list of every possible reason someone might cancel?" Which response belongs in the gap?

D. Exactly. The sample defines that percentage. We have not established representativeness, and mentioning a concern does not isolate its causal effect on the decision to leave.

A Not here. This line belongs to turn 18, after Ada says: "We can compare interview accounts, service records, and actual commercial terms to see where the evidence agrees or conflicts." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 8, after Ada says: "How should I organize the next analysis without creating a huge list of every possible reason someone might cancel?" It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 2, after Ada says: "Price tops the exit-interview list. My draft says it is driving churn. Before I send that to the client, does the evidence justify the wording?" It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Karim's response in turn 6. It connects Ada's preceding point with Ada's follow-up. The twenty interviewees are not automatically representative of all sixty departures, and mentions do not establish cause.

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E / Conversation

1. hypothesis

Turn 2. Price is an explanation to test, not a cause established by interview frequency.

02 / Answers and explanations / continued

2. overlap

Turn 4. Several topics can describe the same respondent, so their counts can exceed the interview count.

3. sample

Turn 6. The twenty interviewees are not automatically representative of all sixty departures, and mentions do not establish cause.

4. issue tree

Turn 8. The tree organizes decision-relevant subquestions without treating its initial branches as proven explanations.

5. MECE

Turn 10. MECE checks structure; the label does not make interacting customer experiences independent or exclusive.

6. causal mechanism

Turn 12. This asks how and when price could influence departure, beyond merely recording a repeated complaint.

7. disconfirming evidence

Turn 14. Comparable retained accounts could weaken the price explanation; comparison quality still needs examination.

8. segmentation

Turn 16. Defined customer groups can reveal different patterns that a combined result might conceal.

9. triangulation

Turn 18. Comparing evidence sources can inform the explanation without automatically establishing a causal effect.

10. analytical priority

Turn 20. A priority is a decision-relevant test with an evidence source and owner, not merely an easy task.

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02 / Answers and explanations / continued

F / Accuracy and scope

F1. How should the issue categories be presented?

C. As overlapping mentions, with the coding method explained

The multi-response design requires clear overlap disclosure to avoid misleading totals.

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F2. What makes an analytical priority useful?

C. It could change the decision and has an explicit evidence test.

Priority should follow decision relevance and a testable inquiry, not convenience or guaranteed agreement.

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F / Guided speaking

1. ten customers

Analyst: The interview sample contains ten customers.

Turn 1. Ten departing customers were interviewed, not the full population of forty departures.

2. 60%

Manager: Onboarding was mentioned by 60% of interviewees.

Turn 2. Six divided by ten equals sixty percent within this interview sample.

3. overlapping mentions

Analyst: The categories contain overlapping mentions.

Turn 3. Multiple answers were allowed, so onboarding and support may describe the same people.

4. causal driver

Manager: The result does not establish a causal driver.

Turn 4. Topic frequency alone neither isolates the cause nor represents all departing customers.

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02 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "A frequent complaint is not yet the cause of churn".

Ada: "What about accounts that had the same price increase and stayed? I have focused on departures, but that comparison could change the story." Karim: [missing response] Ada: "Service delays may affect some customer groups more than others. A combined result could hide that pattern." Which response belongs in the gap?

A. That could provide disconfirming evidence. Check comparability and relevant differences before interpreting it. The aim is to test the explanation, not select the most convenient retained accounts to prove the opposite.

A Correct. This is Karim's response in turn 14. It connects Ada's preceding point with Ada's follow-up. Comparable retained accounts could weaken the price explanation; comparison quality still needs examination.

B Not here. This line belongs to turn 10, after Ada says: "We sometimes call our trees MECE. That could be misleading if we use the label to suggest that these customer experiences cannot coexist." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 4, after Ada says: "Twelve mentioned price, nine mentioned service delays, and five mentioned competitor features. The total is greater than twenty because people could mention several issues." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 20, after Ada says: "I will revise the update to state the interview pattern and the tests needed before recommending a price response." It addresses that point, not the missing turn in the supplied exchange.

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03 / Answers and explanations

A / Read the situation

A1. How many items are required for the first analysis?

C. Six

The brief identifies six measures needed first and leaves the remaining thirty-four unprioritized.

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A2. Which period is required?

D. January through June, monthly, for both centers

The required structure is monthly coverage from January through June for North and South.

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A3. What is the timing problem?

D. A Friday deadline is later than the Wednesday workshop that needs the analysis.

The first analysis must support Wednesday, so its necessary inputs need a feasible earlier arrangement.

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D / Response choices

D1. Which revised request is most useful?

C. Six defined monthly measures first, with agreed owners and dates; prioritize the rest separately.

A staged request aligns the immediate analysis with defined information, accountable owners, and feasible delivery.

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D2. What should happen if an existing report is available?

C. Check its definitions, scope, and coverage before accepting it.

Existing reports may reduce effort, but their fields and boundaries must fit the required analysis.

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03 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: The person or function responsible for the relevant information. Which term fits?

D. data owner

A Not here. source system: The originating application or record for data. The usual combination is "identify the source system".

B Not here. data dictionary: Definitions of fields, units, and relevant rules. The usual combination is "request a data dictionary".

C Not here. delivery sequence: The order in which information will be provided. The usual combination is "agree the delivery sequence".

D Correct. data owner: The person or function responsible for the relevant information. The usual combination is "identify the data owner".

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D4. Rebuild the exchange from "Forty requests, but only six are needed first". Leah: "Please name the six measures. We may already have monthly reports that save the teams from producing new files." Mateo: [missing response] Leah: "We have monthly summaries, but the two sites may define completed and reopened differently. The report labels do not explain that." Which response belongs in the gap?

B. Our minimum viable dataset is completed cases, paid staff hours, labor cost, vendor cost, reopened cases, and opening backlog for January through June at both centers.

A Not here. This line belongs to turn 14, after Leah says: "I can identify the relevant owners today. They need to confirm what can be supplied before the workshop, rather than have a date assigned without discussion." It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Mateo's response in turn 6. It connects Leah's preceding point with Leah's follow-up. The six specified measures supply the initial analysis, rather than every possible future question.

C Not here. This line belongs to turn 20, after Leah says: "Once the owners confirm the first batch, I will send the agreed files with their extraction dates." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 12, after Leah says: "There is a catch in labor cost: North includes a shared-service allocation. I need to check South before you compare the two totals." It addresses that point, not the missing turn in the supplied exchange.

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E / Conversation

1. data request list

Turn 2. The list needs to distinguish the six immediate inputs from later, unprioritized work.

2. delivery sequence

Turn 4. The sequence puts workshop inputs first, with dates negotiated against actual client capacity.

03 / Answers and explanations / continued

3. minimum viable dataset

Turn 6. The six specified measures supply the initial analysis, rather than every possible future question.

4. data dictionary

Turn 8. Definitions prevent different site meanings from being treated as equivalent simply because labels match.

5. granularity

Turn 10. Suitable monthly center totals may answer the initial question without requiring individual case records.

6. reconciliation

Turn 12. The differing cost allocations need examination so unlike operating boundaries are not silently compared.

7. data owner

Turn 14. The owner confirms and supplies the information, supporting a realistic commitment and accurate definitions.

8. secure transfer

Turn 16. Files need the approved route and permissions, not any convenient communication channel.

9. exception log

Turn 18. The log records missing periods and unresolved definitions rather than silently replacing them.

10. version identifier

Turn 20. The identifier distinguishes supplied files from revisions, making the analysis and corrections traceable.

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F / Accuracy and scope

F1. What if a priority item cannot arrive before the workshop?

C. Agree a realistic plan and state the resulting analytical limit.

A missing input changes what the analysis can support and should be disclosed rather than concealed.

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03 / Answers and explanations / continued

F2. Which information-handling choice fits the first task?

B. Use suitable aggregates through approved access and transfer arrangements.

The case calls for the necessary level of detail and authorized handling, not unrestricted collection or access.

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F / Guided speaking

1. four inputs

Consultant: The first batch contains four inputs.

Turn 1. Four specified inputs support the immediate review, not all twenty-five requested items.

2. Monday

Client: The first review is on Monday.

Turn 2. Monday is the stated review date that the first delivery sequence must support.

3. twenty-one items

Consultant: The later group contains twenty-one items.

Turn 3. Subtracting four priority inputs from twenty-five leaves twenty-one items for later prioritization.

4. definitions

Client: Before using existing summaries, confirm their definitions.

Turn 4. Available files must match the intended measures; their existence alone does not establish suitability.

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03 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "Forty requests, but only six are needed first". Leah: "I can identify the relevant owners today. They need to confirm what can be supplied before the workshop, rather than have a date assigned without discussion." Mateo: [missing response] Leah: "Our team also needs to know how the files will be shared and which consultants are authorized to see them." Which response belongs in the gap?

A. Agreed. Each data owner should confirm the definition and feasible delivery date. We will prioritize the other thirty-four items separately once their analytical purpose is clear.

A Correct. This is Mateo's response in turn 14. It connects Leah's preceding point with Leah's follow-up. The owner confirms and supplies the information, supporting a realistic commitment and accurate definitions.

B Not here. This line belongs to turn 6, after Leah says: "Please name the six measures. We may already have monthly reports that save the teams from producing new files." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 12, after Leah says: "There is a catch in labor cost: North includes a shared-service allocation. I need to check South before you compare the two totals." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 20, after Leah says: "Once the owners confirm the first batch, I will send the agreed files with their extraction dates." It addresses that point, not the missing turn in the supplied exchange.

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04 / Answers and explanations

A / Read the situation

A1. What authorization is requested?

A. A four-week, one-center pilot with a \$20,000 budget

The proposal specifies a bounded pilot and budget, not organization-wide implementation.

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A2. What evidence exists so far?

D. Walkthroughs suggesting a possible benefit, with no live operating result

The brief identifies walkthrough evidence and explicitly states that live operating results are absent.

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A3. What are the proposed success measures?

C. Median handling time at most 10 minutes and error rate at most 2%

The proposed test combines the stated median-time threshold with an error-rate guardrail under agreed definitions.

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D / Response choices

D1. Which opening is decision-focused and accurate?

C. Approve a four-week, one-center pilot for \$20,000 to test the proposed process.

The accurate opening states the bounded authorization being sought without inventing achieved results.

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D2. Which statement belongs in the main presentation?

B. No live operating result is available yet.

The absence of live evidence materially affects the decision and should not be buried in supporting material.

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04 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: A slide heading expressing its key conclusion or implication. Which term fits?

B. action title

A Not here. recommendation: A proposed course of action with its supporting basis. The usual combination is "make a recommendation".

B Correct. action title: A slide heading expressing its key conclusion or implication. The usual combination is "use an action title".

C Not here. pilot: A limited test of an approach before a wider decision. The usual combination is "authorize a pilot".

D Not here. appendix: Supporting detail placed after the main material. The usual combination is "move detail to the appendix".

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D4. Rebuild the exchange from "Twelve charts need one clear decision request". Jun: "Then the next page should explain why testing is reasonable and what uncertainty the pilot would address." Sofia: [missing response] Jun: "The current handling-time chart says twelve minutes. I need to label that as the median, not just call it the average." Which response belongs in the gap?

B. That gives us a storyline. Each exhibit should serve that argument. If a chart does not affect the decision or explain the test, it probably does not need equal time in the meeting.

A Not here. This line belongs to turn 8, after Jun says: "The current handling-time chart says twelve minutes. I need to label that as the median, not just call it the average." It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Sofia's response in turn 6. It connects Jun's preceding point with Jun's follow-up. The storyline connects the request, evidence, uncertainty, and test rather than merely arranging charts by topic.

C Not here. This line belongs to turn 12, after Jun says: "We should define eligible cases and how errors are counted before launching, rather than adjust the measures after seeing the result." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 10, after Jun says: "The error measure is on a separate page. The committee might hear the faster-time target and miss the quality condition." It addresses that point, not the missing turn in the supplied exchange.

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E / Conversation

1. decision ask

Turn 2. The audience needs the specific pilot scope and budget request before the supporting charts.

04 / Answers and explanations / continued

2. recommendation

Turn 4. The recommendation proposes a test; walkthroughs do not support a promise of live improvement.

3. storyline

Turn 6. The storyline connects the request, evidence, uncertainty, and test rather than merely arranging charts by topic.

4. median

Turn 8. The stated median must not be relabeled as the mean or a value applying to every case.

5. guardrail

Turn 10. The error limit stays visible alongside speed, preventing a one-sided definition of pilot success.

6. success criteria

Turn 12. The thresholds need agreed measurement rules and eligible-case coverage before results are observed.

7. action title

Turn 14. The heading states the supported implication without claiming more than the exhibit establishes.

8. appendix

Turn 16. Supporting calculations can move here; decision-changing evidence limits must remain in the main presentation.

9. rollout decision

Turn 18. Wider implementation needs a separate later authorization; pilot approval does not automatically permit it.

10. executive synthesis

Turn 20. Synthesis connects findings to a bounded decision instead of giving every analysis equal emphasis.

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04 / Answers and explanations / continued

F / Accuracy and scope

F1. Which comparison preserves the metric?

B. Current median 12 minutes; proposed pilot threshold at most 10 minutes

The comparison keeps the stated summary measure and distinguishes current performance from a proposed threshold.

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F2. What prevents speed from becoming the only success measure?

B. Report the defined error-rate guardrail alongside handling time.

The proposed pilot requires both speed and quality measures over the agreed eligible-case population.

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F / Guided speaking

1. three weeks

Presenter: The proposed duration is three weeks.

Turn 1. Three weeks defines the requested trial period, not a permanent implementation.

2. two branches

Chair: The trial covers two branches.

Turn 2. The specified two-branch boundary limits the scope of the requested authorization.

3. \$12,000

Presenter: The budget request is \$12,000.

Turn 3. Twelve thousand dollars is the amount supplied for this limited trial.

4. another decision

Chair: Broader rollout requires another decision.

Turn 4. Trial approval does not automatically authorize expansion beyond the stated scope.

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04 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "Twelve charts need one clear decision request". Jun: "My title just says Routing Analysis. It tells them the topic, but not what the walkthrough found or why we still need a pilot." Sofia: [missing response] Jun: "I can move the detailed walkthrough calculations behind the main story, with a reference for anyone who wants to inspect them." Which response belongs in the gap?

A. Use an action title that communicates the implication accurately. For example, the evidence supports a limited live test. The heading must not imply proven improvement while the detail says otherwise.

A Correct. This is Sofia's response in turn 14. It connects Jun's preceding point with Jun's follow-up. The heading states the supported implication without claiming more than the exhibit establishes.

B Not here. This line belongs to turn 10, after Jun says: "The error measure is on a separate page. The committee might hear the faster-time target and miss the quality condition." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 4, after Jun says: "Should the opening say the new routing process will reduce handling time, or is that stronger than our evidence supports?" It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 2, after Jun says: "Twelve charts, and I still cannot tell what I want the committee to approve until the last slide. Can we rebuild the opening around the decision?" It addresses that point, not the missing turn in the supplied exchange.

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05 / Answers and explanations

A / Read the situation

A1. What does the signed engagement currently cover?

B. A six-week study of Market A for \$60,000

Market A is the agreed scope; Market B is an additional request not covered by an approved change.

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A2. Can the current team finish both full studies by the original deadline?

C. No, not under the stated capacity.

The brief explicitly states that the current team cannot complete both full studies in the remaining time.

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A3. What must precede extra work?

B. An agreed written change under the signed terms

The fictional contract requires the written change to be agreed before extra work starts.

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D / Response choices

D1. Which response is constructive and accurate?

B. We can assess ways to add Market B, but both full studies do not fit the current capacity and deadline.

The response acknowledges the need while making the known capacity limit and assessment step explicit.

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D2. Which statement about the scan is appropriate?

D. Its reduced coverage and depth must be specified.

A smaller product is a meaningful option only when its boundaries and expected output are clear.

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05 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: A proposal to alter agreed work or arrangements. Which term fits?

B. change request

A Not here. pending approval: Awaiting the relevant authorized decision. The usual combination is "mark the change pending approval".

B Correct. change request: A proposal to alter agreed work or arrangements. The usual combination is "raise a change request".

C Not here. deliverable: A specified output to be supplied. The usual combination is "define the deliverable".

D Not here. high-level scan: A limited overview rather than a full detailed study. The usual combination is "offer a high-level scan".

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D4. Rebuild the exchange from "A second market is a new request, not a free extension". Helen: "What options can you bring back? I would prefer choices to a simple statement that the request is outside scope." Raj: [missing response] Helen: "If you add people, can you guarantee that the final date stays unchanged?" Which response belongs in the gap?

D. We can prepare an impact assessment. The options include additional resources if available, an extension, a narrower scan of Market B, or a later phase. Each has different implications.

A Not here. This line belongs to turn 8, after Helen says: "If you add people, can you guarantee that the final date stays unchanged?" It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 18, after Helen says: "If we choose the narrower scan, the document should say how we will judge whether it has met the agreed brief." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 2, after Helen says: "The board now wants Market B as well. Can you cover it to the same depth and keep our six-week presentation date?" It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Raj's response in turn 6. It connects Helen's preceding point with Helen's follow-up. The assessment compares effects on people, time, fees, scope, and the original commitments.

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E / Conversation

1. scope baseline

Turn 2. The baseline covers Market A; adding Market B changes the agreed work boundaries.

05 / Answers and explanations / continued

2. resource capacity

Turn 4. The current team cannot complete both full studies by the original deadline, despite possible method reuse.

3. impact assessment

Turn 6. The assessment compares effects on people, time, fees, scope, and the original commitments.

4. resource availability

Turn 8. Suitable extra staff must be verified before they can support a promised deadline.

5. high-level scan

Turn 10. The scan is a narrower product with different coverage and evidence depth from a full study.

6. scope trade-off

Turn 12. Any reduction or exchange in the original work must be explicit, not silently absorbed.

7. change authorization

Turn 14. The agreement requires a written approved change before the additional work starts.

8. commercial terms

Turn 16. The new fee remains unassessed; the existing \$60,000 is not a Market B quotation.

9. acceptance criteria

Turn 18. These define what the revised output must contain so its narrower scope can be reviewed fairly.

10. change register

Turn 20. The register tracks the request's status, distinguishing assessed options from an agreed written variation.

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F / Accuracy and scope

F1. What is the status of Market B?

B. Requested and awaiting assessment and written agreement

No assessment or agreed written variation exists, so the request remains unapproved additional work.

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05 / Answers and explanations / continued

F2. What should an impact assessment include?

C. Effects on scope, people, fees, timing, and existing commitments

A decision requires the practical and commercial consequences, including what happens to the original engagement.

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F / Guided speaking

1. Region East

Manager: The current geographic scope is Region East.

Turn 1. Region East alone is included in the existing engagement.

2. Region West

Client: The additional requested region is Region West.

Turn 2. Region West is new work rather than part of the stated original scope.

3. \$35,000

Manager: The existing fee is \$35,000.

Turn 3. This amount applies to the original engagement, not an invented quote for the addition.

4. written variation

Client: Extra work requires an agreed written variation.

Turn 4. The supplied terms make written agreement a prerequisite to starting the additional work.

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05 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "A second market is a new request, not a free extension". Helen: "Could you at least get Market B started while I speak with procurement? I do not want us to lose another week waiting for signatures." Raj: [missing response] Helen: "Understood. I have requested the change, not approved a revised fee or schedule. Those details still need to come back." Which response belongs in the gap?

D. The signed terms require change authorization through an agreed written change before extra work starts. We can assess the request now, but we should not treat pending approval as permission to deliver it.

A Not here. This line belongs to turn 20, after Helen says: "Please bring back the options with their effects on Market A, the timing, and the approval needed for the selected route." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 16, after Helen says: "Understood. I have requested the change, not approved a revised fee or schedule. Those details still need to come back." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 12, after Helen says: "I also need to know whether any of these choices would weaken the work already promised for Market A." It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Raj's response in turn 14. It connects Helen's preceding point with Helen's follow-up. The agreement requires a written approved change before the additional work starts.

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06 / Answers and explanations

A / Read the situation

A1. What staffing did the recommendation assume?

A. Two full-time equivalents for eight weeks

The proposed pilot explicitly requires two full-time-equivalent staff throughout the eight-week period.

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A2. What staffing is actually available?

D. 0.5 full-time equivalent during the period

Leila states the available capacity and the absence of approved additional hiring this quarter.

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A3. What is promised for Wednesday at 15:00?

B. A revised assessment

Ronan commits to returning with an assessment, not to solving or authorizing the launch by that time.

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D / Response choices

D1. Which opening best addresses the feedback?

A. You supplied the limit, and we missed it; the recommendation needs revision.

The appropriate response owns the documented omission and connects it to the need for substantive correction.

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D2. What is the capacity gap?

C. 1.5 FTE

Two required FTE minus half an available FTE leaves a gap of one and a half FTE.

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06 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: A planning belief about resources available for the work. Which term fits?

D. capacity assumption

A Not here. revision note: A record of what changed and why. The usual combination is "include a revision note".

B Not here. fact check: Verification of a statement against relevant evidence. The usual combination is "complete a fact check".

C Not here. phasing: Dividing work into sequenced stages. The usual combination is "assess phased delivery".

D Correct. capacity assumption: A planning belief about resources available for the work. The usual combination is "correct the capacity assumption".

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D4. Rebuild the exchange from "The recommendation depends on staff the client does not have". Leila: "That is a large difference. I do not want a cosmetic change to the slide while the same workload remains underneath." Ronan: [missing response] Leila: "One suggestion was to stretch the pilot to four times the duration. That sounds neat on a spreadsheet. Does the work actually divide that way?" Which response belongs in the gap?

D. The capacity gap is one and a half FTE. We need to examine the work itself, not relabel the resource requirement or imply that the original plan fits.

A Not here. This line belongs to turn 12, after Leila says: "A smaller pilot might be possible, provided it still tests something meaningful and does not leave the committee with an unusable result." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 8, after Leila says: "One suggestion was to stretch the pilot to four times the duration. That sounds neat on a spreadsheet. Does the work actually divide that way?" It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 18, after Leila says: "I can check whether the next version accurately represents our capacity. That review will not authorize additional staffing." It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Ronan's response in turn 6. It connects Leila's preceding point with Leila's follow-up. Two required FTE minus half available leaves 1.5 FTE; changing slide wording does not remove it.

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E / Conversation

1. staffing constraint

Turn 2. The half-FTE limit was already supplied; the consultant missed it during discovery.

06 / Answers and explanations / continued

2. capacity assumption

Turn 4. The plan must reflect half an available FTE and the absence of approved additional hiring.

3. capacity gap

Turn 6. Two required FTE minus half available leaves 1.5 FTE; changing slide wording does not remove it.

4. feasibility

Turn 8. Actual tasks and constraints need examination; a capacity ratio alone does not prove a workable schedule.

5. resourcing model

Turn 10. This maps people and effort by task so the proposal can be rebuilt around real capacity.

6. scope reduction

Turn 12. Removing work changes what the pilot can answer, and that consequence must be explicit.

7. phasing

Turn 14. Later stages require confirmed resources; possible future availability is not a staffing commitment.

8. revision note

Turn 16. The note explains the corrected assumption and changes; Wednesday's promise is an assessment, not launch.

9. client sign-off

Turn 18. Checking factual accuracy is not the same as approving staffing or implementation.

10. follow-through

Turn 20. The repair requires completing the promised revision and version correction, not merely apologizing.

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F / Accuracy and scope

F1. Why is multiplying the duration by four not a proven fix?

C. Task sequencing and minimum staffing may prevent simple proportional scaling.

Capacity ratios describe the gap but do not establish how the actual work can be rescheduled.

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06 / Answers and explanations / continued

F2. Which follow-up statement is accurate?

C. A revised assessment will be supplied by the agreed time; launch feasibility remains to be established.

The promised deliverable is the revised assessment, not an untested solution or a separate approval.

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F / Guided speaking

1. 1.5 FTE

Consultant: The proposal assumed 1.5 FTE.

Turn 1. One and a half full-time equivalents is the stated requirement in the proposal.

2. 0.5 FTE

Client: Confirmed available capacity is 0.5 FTE.

Turn 2. Half a full-time equivalent is available, with no extra staffing approved.

3. 1.0 FTE

Consultant: The resulting capacity gap is 1.0 FTE.

Turn 3. Subtracting half an FTE from one and a half leaves one FTE.

4. revised assessment

Client: Friday's commitment is a revised assessment.

Turn 4. The consultant promises an assessment, not completion or authorization of the proposed review.

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06 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "The recommendation depends on staff the client does not have". Leila: "There may also be a later period with different capacity, but I cannot promise those people now." Ronan: [missing response] Leila: "When can I expect a revised assessment? Please distinguish that from telling the committee we have an approved launch plan." Which response belongs in the gap?

B. We can assess that phasing option with its conditions visible. We should not replace one unsupported staffing assumption with another about resources that may become available later.

A Not here. This line belongs to turn 8, after Leila says: "One suggestion was to stretch the pilot to four times the duration. That sounds neat on a spreadsheet. Does the work actually divide that way?" It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Ronan's response in turn 14. It connects Leila's preceding point with Leila's follow-up. Later stages require confirmed resources; possible future availability is not a staffing commitment.

C Not here. This line belongs to turn 12, after Leila says: "A smaller pilot might be possible, provided it still tests something meaningful and does not leave the committee with an unusable result." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 6, after Leila says: "That is a large difference. I do not want a cosmetic change to the slide while the same workload remains underneath." It addresses that point, not the missing turn in the supplied exchange.

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07 / Answers and explanations

A / Read the situation

A1. How many managers have demonstrated the required tasks?

D. Four

Four of the ten trained managers have a verified supervised-practice result.

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A2. What remains unknown for eight managers?

A. Their demonstrated-practice result

Eight lack verified practice results; absence of assessment is not proof of inability.

[Return to the exercise, page 81](#)

A3. Which launch requirement is entirely unassigned?

A. Operational cover

The brief explicitly states that operational cover has not yet been assigned.

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D / Response choices

D1. Which readiness statement is accurate?

B. Four have demonstrated the tasks; eight lack verified practice results.

The statement reports the actual practice evidence without confusing missing results with failure or communication with readiness.

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D2. Which next step addresses the stated gaps?

A. Arrange remaining training, supervised practice, and operational cover before seeking the launch decision.

The stated launch conditions require learning, demonstrated practice, and cover, so each outstanding requirement needs an owned action.

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07 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: Actual use of the intended way of working. Which term fits?

C. adoption

A Not here. job aid: A concise reference supporting task performance. The usual combination is "supply a job aid".

B Not here. process owner: The person accountable for a defined process and its ongoing management. The usual combination is "confirm the process owner".

C Correct. adoption: Actual use of the intended way of working. The usual combination is "measure process adoption".

D Not here. reinforcement: Follow-up support that helps maintain a desired practice. The usual combination is "provide reinforcement".

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D4. Rebuild the exchange from "Receiving the launch email is not readiness". David: "Two managers still need the training itself. Their teams have been busy, and they have not had time set aside." Imani: [missing response] David: "Even trained managers need an opportunity to practice. We should not assume that attendance establishes independent performance." Which response belongs in the gap?

C. They need protected time and an agreed route to complete the requirement. Calling them resistant would not address the scheduling barrier or tell us whether they can perform the tasks.

A Not here. This line belongs to turn 2, after David says: "The dashboard is green for Monday because all twelve managers got the announcement. That tells me the email went out. It does not tell me they can run the process." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 20, after David says: "And if usage improves, we still need to examine whether the change produces the expected service improvement." It addresses that point, not the missing turn in the supplied exchange.

C Correct. This is Imani's response in turn 6. It connects David's preceding point with David's follow-up. Time must be set aside for required learning rather than added silently to full workloads.

D Not here. This line belongs to turn 16, after David says: "We also need a clear route for questions during the first days. People should not have to find the consultant who last answered an email." It addresses that point, not the missing turn in the supplied exchange.

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E / Conversation

1. implementation readiness

Turn 2. Launch requires the stated conditions; receiving the announcement establishes only that communication occurred.

07 / Answers and explanations / continued

2. supervised practice

Turn 4. An observed task result supports readiness; eight missing results do not mean eight people failed.

3. protected time

Turn 6. Time must be set aside for required learning rather than added silently to full workloads.

4. Training completion

Turn 8. Finishing training is separate from demonstrating the tasks under this agreed readiness plan.

5. operational cover

Turn 10. Normal work needs an assigned arrangement while managers prepare; that requirement remains unresolved.

6. readiness gate

Turn 12. A smaller launch still needs its own scope, cover, support, and authorization.

7. process owner

Turn 14. The owner holds ongoing operational responsibility, distinct from the change team's temporary transition support.

8. support model

Turn 16. Named assistance and escalation arrangements prevent reliance on informal personal contacts after launch.

9. adoption

Turn 18. Adoption means actual workflow use, not pre-launch training attendance or receipt of a notice.

10. benefit realization

Turn 20. The intended business result requires evidence beyond training completion or use of the workflow.

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07 / Answers and explanations / continued

F / Accuracy and scope

F1. What does a usage measure show?

D. Actual use of the defined workflow

Usage concerns observed behavior. It does not alone demonstrate independent proficiency, establish a causal service benefit, or prove that every trainee uses the process.

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F2. How should a staged launch be described?

C. A possible revised plan requiring explicit scope, support, cover, and authorization

A smaller start is an option for assessment, not automatic permission to bypass the agreed decision process.

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F / Guided speaking

1. eight supervisors

Lead: The notice reached eight supervisors.

Turn 1. Receipt of the notice establishes communication to eight people, not completion of the readiness conditions.

2. six supervisors

Owner: Training is complete for six supervisors.

Turn 2. Six completed the specified learning step, which is separate from demonstrated practice.

3. three supervisors

Lead: Verified task demonstrations total three supervisors.

Turn 3. Three trained supervisors have demonstrated the tasks under the supplied facts.

4. no verified practice result

Owner: The five others have no verified practice result, not necessarily failed.

Turn 4. A missing result describes an evidence gap and does not establish inability.

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07 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "Receiving the launch email is not readiness". David: "I will coordinate those operational arrangements. The change team can support the transition, but somebody in the business must own the process afterward." Imani: [missing response] David: "We also need a clear route for questions during the first days. People should not have to find the consultant who last answered an email." Which response belongs in the gap?

A. That is the process owner role. The handover should state who handles exceptions, maintains the instructions, and decides when an issue needs escalation after the project team steps back.

A Correct. This is Imani's response in turn 14. It connects David's preceding point with David's follow-up. The owner holds ongoing operational responsibility, distinct from the change team's temporary transition support.

B Not here. This line belongs to turn 2, after David says: "The dashboard is green for Monday because all twelve managers got the announcement. That tells me the email went out. It does not tell me they can run the process." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 6, after David says: "Two managers still need the training itself. Their teams have been busy, and they have not had time set aside." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 10, after David says: "The cover issue worries me. If everyone practices at the same time, the existing approval queue still needs to be handled." It addresses that point, not the missing turn in the supplied exchange.

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08 / Answers and explanations

A / Read the situation

A1. What does the committee agree on?

D. The need to improve service handoffs

Agreement concerns the problem, while the option choice and implementation spending remain unapproved.

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A2. What did Marta decide at the close?

B. Defer the option choice to Friday at 10:00 local time

The chair explicitly defers the choice to the stated meeting rather than selecting either option.

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A3. What must Ethan verify by Thursday at 12:00?

D. The system integration position for Option B

Ethan owns the integration follow-up; Nora separately owns Option A staffing confirmation.

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D / Response choices

D1. Which minute accurately records the meeting?

D. The option decision is deferred to Friday at 10:00; neither option nor additional spending is approved.

The chair deferred the choice and granted no implementation approval, so the record must preserve that status.

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D2. What is Option B's estimated cost premium over A?

C. \$60,000

Subtracting the eighty-thousand estimate from one hundred forty thousand gives a sixty-thousand premium.

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08 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: The formal record of a meeting's relevant discussion and decisions. Which term fits?

A. minutes

A Correct. minutes: The formal record of a meeting's relevant discussion and decisions. The usual combination is "confirm the minutes".

B Not here. decision pack: The material supplied to support a forthcoming choice. The usual combination is "update the decision pack".

C Not here. manual reporting: Reporting that requires human preparation rather than the proposed automation. The usual combination is "account for manual reporting".

D Not here. endorsement: An expression of support that may differ from formal authorization. The usual combination is "clarify the endorsement".

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D4. Rebuild the exchange from "Agreement on the problem is not approval of an option". Marta: "So B is estimated to cost sixty thousand more and take six weeks longer. Its automation is not yet a confirmed capability." Ethan: [missing response] Marta: "Option A is not fully ready either. Nora still needs to confirm that the required staff can be assigned." Which response belongs in the gap?

D. Correct. The integration dependency remains unverified. We should not describe B as ready simply because automated reporting appears in the proposed design.

A Not here. This line belongs to turn 2, after Marta says: "Two minutes left. We agree the handoffs need fixing, but we have not agreed on A or B. I need a clean close, not a show of consensus we do not have." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 12, after Marta says: "Please do not write approved subject to confirmation. That would suggest we selected something today. We are deferring the choice, not attaching conditions to an approval." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 18, after Marta says: "Some members favor speed, while others value automation more. Record that disagreement without presenting it as personal resistance." It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Ethan's response in turn 6. It connects Marta's preceding point with Marta's follow-up. Option B's automated reporting relies on a system connection that has not been verified.

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E / Conversation

1. consensus

Turn 2. Agreement concerns the problem, not a selected option or permission to implement it.

08 / Answers and explanations / continued

2. option appraisal

Turn 4. The comparison must include relevant criteria and unresolved assumptions, not just two prices.

3. integration dependency

Turn 6. Option B's automated reporting relies on a system connection that has not been verified.

4. open item

Turn 8. Option A staffing remains unresolved alongside the integration uncertainty affecting Option B.

5. deferred decision

Turn 10. Deferral moves the choice to Friday without approving either option in the meantime.

6. approval status

Turn 12. Both options and additional implementation spending remain unapproved despite the assigned follow-up actions.

7. action owner

Turn 14. Ethan owns integration verification; Nora owns staffing confirmation, each with the stated deadline.

8. trade-off

Turn 16. Cost and timing must be weighed with reporting capability and feasibility rather than deciding from one figure.

9. dissent

Turn 18. The record preserves substantive disagreements without inventing motives or personal resistance.

10. decision log

Turn 20. The log records deferral, approval status, owners, and deadlines so later readers do not invent authorization.

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F / Accuracy and scope

F1. Who owns Option A staffing confirmation?

A. Nora

The brief assigns the staffing follow-up specifically to operations lead Nora.

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08 / Answers and explanations / continued

F2. Which closing behavior is most useful?

D. Read back the unresolved choice, follow-up owners, deadlines, and approval status.

An explicit read-back preserves what was actually decided and makes the next actions accountable.

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F / Guided speaking

1. deferred

Chair: The option choice is deferred.

Turn 1. The committee has postponed the choice, not conditionally approved a proposal.

2. Tuesday at 09:00

Presenter: The next decision time is Tuesday at 09:00.

Turn 2. Tuesday at nine is the explicitly stated time for the option decision.

3. Mei

Chair: The staffing action owner is Mei.

Turn 3. Mei has the named responsibility for the staffing follow-up.

4. not approved

Presenter: Additional spending is not approved.

Turn 4. Agreement on the problem and assignment of follow-ups do not authorize extra spending.

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08 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "Agreement on the problem is not approval of an option". Marta: "Ethan, please verify the integration position by Thursday at noon. Nora will confirm Option A staffing by the same time." Ethan: [missing response] Marta: "The next discussion should make clear what we gain and give up with each option, not just list two prices." Which response belongs in the gap?

B. I will list each action owner separately. My follow-up is the integration position; Nora's is staffing. Both are due Thursday at twelve hundred local time for the updated decision material.

A Not here. This line belongs to turn 10, after Marta says: "We do not have enough resolved information to choose now. I am deferring the option decision to Friday at ten hundred local time." It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Ethan's response in turn 14. It connects Marta's preceding point with Marta's follow-up. Ethan owns integration verification; Nora owns staffing confirmation, each with the stated deadline.

C Not here. This line belongs to turn 4, after Marta says: "Please keep the cost, timing, and reporting differences clear. The committee has heard many details and needs the comparison in one place." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 8, after Marta says: "Option A is not fully ready either. Nora still needs to confirm that the required staff can be assigned." It addresses that point, not the missing turn in the supplied exchange.

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Review 1 / Explanations

Cumulative review

1. A colleague needs the term for this meaning: The choice that the analysis is intended to support. Which term fits?

B. decision question

A Not here. constraint: A limit that an option must respect or explicitly address. The usual combination is "surface a constraint".

B Correct. decision question: The choice that the analysis is intended to support. The usual combination is "define the decision question".

C Not here. in scope: Included in the agreed work boundaries. The usual combination is "confirm what is in scope".

D Not here. comparability: The degree to which a comparison uses sufficiently similar definitions and conditions. The usual combination is "assess comparability".

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2. A colleague needs the term for this meaning: A question allowing more than one answer category. Which term fits?

A. multi-response question

A Correct. multi-response question: A question allowing more than one answer category. The usual combination is "interpret a multi-response question".

B Not here. segmentation: Dividing a population into defined groups for analysis. The usual combination is "use customer segmentation".

C Not here. overlap: Inclusion of the same observation in more than one category. The usual combination is "identify category overlap".

D Not here. hypothesis: A proposed explanation that can be examined against evidence. The usual combination is "test a hypothesis".

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Review 1 / Explanations / continued

3. Rebuild the exchange from "The requested study is not the decision". Rita: "I can imagine a lower annual cost after centralizing. Getting there is another matter. We have not costed the move or the service disruption." Owen: [missing response] Rita: "The peer organizations may handle different types of support requests. Some provide fewer service hours than we do." Which response belongs in the gap?

B. Separate transition cost from the steady-state comparison. We should show temporary effects and ongoing costs distinctly, rather than present a future operating estimate as the whole business case.

A Not here. This line belongs to turn 2, after Rita says: "The committee keeps asking why our support centers cost so much. Could you give us a peer benchmark before the next decision meeting?" It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Owen's response in turn 10. It connects Rita's preceding point with Rita's follow-up. These costs arise during the change and must remain distinct from settled operating costs.

C Not here. This line belongs to turn 4, after Rita says: "We need to decide whether North and South should become one centralized support operation or continue running separately." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 8, after Rita says: "Cost matters, but we also need acceptable response times and continuity. A cheap arrangement that interrupts service would not solve the problem." It addresses that point, not the missing turn in the supplied exchange.

[Return to the exercise, page 28](#)

Review 1 / Explanations / continued

4. Rebuild the exchange from "A frequent complaint is not yet the cause of churn".

Ada: "We can compare interview accounts, service records, and actual commercial terms to see where the evidence agrees or conflicts." **Karim:** [missing response]

Ada: "I will revise the update to state the interview pattern and the tests needed before recommending a price response." Which response belongs in the gap?

B. That is useful triangulation. Keep discrepancies visible. Agreement across sources may strengthen an interpretation, but it does not automatically remove all alternative explanations.

A Not here. This line belongs to turn 8, after Ada says: "How should I organize the next analysis without creating a huge list of every possible reason someone might cancel?" It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Karim's response in turn 18. It connects Ada's preceding point with Ada's follow-up. Comparing evidence sources can inform the explanation without automatically establishing a causal effect.

C Not here. This line belongs to turn 16, after Ada says: "Service delays may affect some customer groups more than others. A combined result could hide that pattern." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 6, after Ada says: "Twelve out of twenty is sixty percent. I should say sixty percent of interviewees mentioned price, not sixty percent of departures were caused by price." It addresses that point, not the missing turn in the supplied exchange.

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Review 2 / Explanations

Cumulative review

1. A colleague needs the term for this meaning: The smallest adequate set of information for a defined initial analysis. Which term fits?

D. minimum viable dataset

A Not here. reconciliation: A comparison used to explain or resolve differences between records. The usual combination is "reconcile source totals".

B Not here. request dependency: A condition that must be met before a requested item can be delivered or used. The usual combination is "identify request dependencies".

C Not here. reporting period: The time interval covered by a measure. The usual combination is "specify the reporting period".

D Correct. minimum viable dataset: The smallest adequate set of information for a defined initial analysis. The usual combination is "define the minimum viable dataset".

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2. A colleague needs the term for this meaning: A consequence or significance for the decision. Which term fits?

B. implication

A Not here. storyline: The logical sequence connecting a presentation's messages. The usual combination is "build the storyline".

B Correct. implication: A consequence or significance for the decision. The usual combination is "explain the implication".

C Not here. caveat: A material limitation or condition on a claim. The usual combination is "retain the caveat".

D Not here. denominator: The total underlying a proportion or rate. The usual combination is "state the denominator".

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Review 2 / Explanations / continued

3. Rebuild the exchange from "A frequent complaint is not yet the cause of churn".

Ada: "We sometimes call our trees MECE. That could be misleading if we use the label to suggest that these customer experiences cannot coexist." **Karim:** [missing response] **Ada:** "For price, we could check the amounts customers actually paid and whether a change occurred before cancellation." Which response belongs in the gap?

A. Treat MECE as a structuring check, not a substitute for understanding the data. Define the coding and identify gaps or overlaps instead of forcing complex departures into artificial single-cause boxes.

A Correct. This is Karim's response in turn 10. It connects Ada's preceding point with Ada's follow-up. MECE checks structure; the label does not make interacting customer experiences independent or exclusive.

B Not here. This line belongs to turn 20, after Ada says: "I will revise the update to state the interview pattern and the tests needed before recommending a price response." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 4, after Ada says: "Twelve mentioned price, nine mentioned service delays, and five mentioned competitor features. The total is greater than twenty because people could mention several issues." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 2, after Ada says: "Price tops the exit-interview list. My draft says it is driving churn. Before I send that to the client, does the evidence justify the wording?" It addresses that point, not the missing turn in the supplied exchange.

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Review 2 / Explanations / continued

4. Rebuild the exchange from "Twelve charts need one clear decision request". Jun: "If the committee approves the pilot, the minutes should not say that it approved the entire new operating model." Sofia: [missing response] Jun: "I will reorder the deck around the request, evidence, proposed test, and decision conditions, with the detailed calculations available separately." Which response belongs in the gap?

C. Correct. A rollout decision comes later, after the relevant results and review. We should state that distinction in both the request and the closing summary.

A Not here. This line belongs to turn 4, after Jun says: "Should the opening say the new routing process will reduce handling time, or is that stronger than our evidence supports?" It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 2, after Jun says: "Twelve charts, and I still cannot tell what I want the committee to approve until the last slide. Can we rebuild the opening around the decision?" It addresses that point, not the missing turn in the supplied exchange.

C Correct. This is Sofia's response in turn 18. It connects Jun's preceding point with Jun's follow-up. Wider implementation needs a separate later authorization; pilot approval does not automatically permit it.

D Not here. This line belongs to turn 14, after Jun says: "My title just says Routing Analysis. It tells them the topic, but not what the walkthrough found or why we still need a pilot." It addresses that point, not the missing turn in the supplied exchange.

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Review 3 / Explanations

Cumulative review

1. A colleague needs the term for this meaning: A specified charge for a defined scope under the agreement. Which term fits?

A. fixed fee

A Correct. fixed fee: A specified charge for a defined scope under the agreement. The usual combination is "confirm the fixed fee".

B Not here. change register: A record of requested changes and their status. The usual combination is "maintain the change register".

C Not here. resource availability: Whether suitable people or other resources can be assigned when needed. The usual combination is "check resource availability".

D Not here. scope trade-off: Exchanging one work element for another under agreed conditions. The usual combination is "explain a scope trade-off".

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2. A colleague needs the term for this meaning: A missed fact or step; in other contexts, supervisory responsibility. Which term fits?

A. oversight

A Correct. oversight: A missed fact or step; in other contexts, supervisory responsibility. The usual combination is "acknowledge the oversight".

B Not here. critical task: Work essential to the intended result or necessary sequence. The usual combination is "identify critical tasks".

C Not here. client feedback: Information from the client about the work or its usefulness. The usual combination is "respond to client feedback".

D Not here. hiring approval: Authorization to recruit or add the relevant staff. The usual combination is "confirm hiring approval".

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Review 3 / Explanations / continued

3. Rebuild the exchange from "Twelve charts need one clear decision request". Jun: "The error measure is on a separate page. The committee might hear the faster-time target and miss the quality condition." Sofia: [missing response] Jun: "We should define eligible cases and how errors are counted before launching, rather than adjust the measures after seeing the result." Which response belongs in the gap?

B. Bring the guardrail alongside it. The proposed error rate must be no higher than two percent under the agreed definition. Faster work is not enough if quality deteriorates beyond that limit.

A Not here. This line belongs to turn 12, after Jun says: "We should define eligible cases and how errors are counted before launching, rather than adjust the measures after seeing the result." It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Sofia's response in turn 10. It connects Jun's preceding point with Jun's follow-up. The error limit stays visible alongside speed, preventing a one-sided definition of pilot success.

C Not here. This line belongs to turn 2, after Jun says: "Twelve charts, and I still cannot tell what I want the committee to approve until the last slide. Can we rebuild the opening around the decision?" It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 16, after Jun says: "I can move the detailed walkthrough calculations behind the main story, with a reference for anyone who wants to inspect them." It addresses that point, not the missing turn in the supplied exchange.

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4. Rebuild the exchange from "The recommendation depends on staff the client does not have". Leila: "I can check whether the next version accurately represents our capacity. That review will not authorize additional staffing." Ronan: [missing response] Leila: "Then please make sure the previous version is no longer circulated as the current recommendation." Which response belongs in the gap?

A. Understood. Your factual review is not automatic client sign-off on a new staffing plan or launch. We will identify the actual approval route for whichever option proves supportable.

A Correct. This is Ronan's response in turn 18. It connects Leila's preceding point with Leila's follow-up. Checking factual accuracy is not the same as approving staffing or implementation.

B Not here. This line belongs to turn 6, after Leila says: "That is a large difference. I do not want a cosmetic change to the slide while the same workload remains underneath." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 12, after Leila says: "A smaller pilot might be possible, provided it still tests something meaningful and does not leave the committee with an unusable result." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 8, after Leila says: "One suggestion was to stretch the pilot to four times the duration. That sounds neat on a spreadsheet. Does the work actually divide that way?" It addresses that point, not the missing turn in the supplied exchange.

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Review 4 / Explanations

Cumulative review

1. A colleague needs the term for this meaning: The point when a process or system begins actual operation. Which term fits?

C. go-live

A Not here. backfill: Replacement capacity for work someone cannot perform during an assignment or absence. The usual combination is "arrange backfill".

B Not here. role-based training: Learning tailored to the tasks and responsibilities of a role. The usual combination is "provide role-based training".

C Correct. go-live: The point when a process or system begins actual operation. The usual combination is "confirm go-live readiness".

D Not here. stabilization: Work to bring a new operation into a reliable ongoing state. The usual combination is "monitor stabilization".

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2. A colleague needs the term for this meaning: Authorization that depends on stated conditions. Which term fits?

C. conditional approval

A Not here. steering committee: A governance group overseeing direction and specified decisions. The usual combination is "brief the steering committee".

B Not here. action owner: The person responsible for a defined next step. The usual combination is "name the action owner".

C Correct. conditional approval: Authorization that depends on stated conditions. The usual combination is "distinguish conditional approval".

D Not here. implementation estimate: A projection of time or resources needed to execute an option. The usual combination is "qualify the implementation estimate".

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Review 4 / Explanations / continued

3. Rebuild the exchange from "The recommendation depends on staff the client does not have". Leila: "What will you check before bringing another option back? The operation still needs a useful answer, but the people limit is real." Ronan: [missing response] Leila: "A smaller pilot might be possible, provided it still tests something meaningful and does not leave the committee with an unusable result." Which response belongs in the gap?

C. We will revisit the resourcing model. Identify the essential tasks, dependencies, and review effort, then assess what could be reduced, phased, or moved without disguising the effect on the pilot's purpose.

A Not here. This line belongs to turn 20, after Leila says: "Then please make sure the previous version is no longer circulated as the current recommendation." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 16, after Leila says: "When can I expect a revised assessment? Please distinguish that from telling the committee we have an approved launch plan." It addresses that point, not the missing turn in the supplied exchange.

C Correct. This is Ronan's response in turn 10. It connects Leila's preceding point with Leila's follow-up. This maps people and effort by task so the proposal can be rebuilt around real capacity.

D Not here. This line belongs to turn 4, after Leila says: "I need the team to understand that no extra hiring is approved this quarter. We cannot simply add people because the presentation assumes them." It addresses that point, not the missing turn in the supplied exchange.

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Review 4 / Explanations / continued

4. Rebuild the exchange from "Agreement on the problem is not approval of an option". Marta: "Some members favor speed, while others value automation more. Record that disagreement without presenting it as personal resistance." Ethan: [missing response] Marta: "Read back the close now, so we can correct anything before the record circulates." Which response belongs in the gap?

D. The relevant dissent concerns priorities and evidence. We can summarize those differences accurately without claiming unanimity or attributing motives that members did not state.

A Not here. This line belongs to turn 12, after Marta says: "Please do not write approved subject to confirmation. That would suggest we selected something today. We are deferring the choice, not attaching conditions to an approval." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 6, after Marta says: "So B is estimated to cost sixty thousand more and take six weeks longer. Its automation is not yet a confirmed capability." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 2, after Marta says: "Two minutes left. We agree the handoffs need fixing, but we have not agreed on A or B. I need a clean close, not a show of consensus we do not have." It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Ethan's response in turn 18. It connects Marta's preceding point with Marta's follow-up. The record preserves substantive disagreements without inventing motives or personal resistance.

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Additional case 1 / Explanations

Extended conversation

1. confidential information

Turn 2. The unpublished site economics and distinctive operating-model details are protected former-client information under the supplied policy; removing a name does not give permission to reuse them.

2. reuse rights

Turn 4. Reuse rights determine what material may be used again and on what terms; creating a slide does not automatically authorize reuse of the client information it contains.

3. de-identification

Turn 6. De-identification reduces identifying details, but distinctive combinations may still reveal the former client; it also does not independently establish permission to reuse confidential material.

4. approved asset

Turn 8. An approved asset is material cleared for the intended reuse, such as the stipulated generic diagnostic template; its status must be checked rather than inferred from convenience.

5. source provenance

Turn 10. Source provenance records where an input came from; using the prospect's identified public report is different from silently importing another client's unpublished figures.

6. client-reference permission

Turn 14. Client-reference permission governs using a client identity or engagement as a reference; it is separate from permission to reuse a method or confidential working materials.

[Return to the conversation, page 109](#)

Transfer exchange

1. template

Consultant: We can reuse the approved generic template.

Turn 1. The policy explicitly permits this generic asset, unlike the confidential pricing table.

Additional case 1 / Explanations / continued

2. confidential

Partner: The old pricing table remains confidential.

Turn 2. Its protected status does not disappear when client labels are removed.

3. report

Consultant: New factual inputs can come from the prospect's published annual report.

Turn 3. The prospect supplied that report for this use, so its facts can be attributed to the identified source.

4. authorized

Partner: A named client reference is not authorized.

Turn 4. The facts expressly state that no permission for a named reference has been granted.

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Additional case 2 / Explanations

Extended conversation

1. capacity value

Turn 2. Capacity value converts released time into a monetary indicator, here 1,200 hours times 50 dollars equals 60,000; it is not by itself a reduction in spending.

2. cash-releasing benefit

Turn 4. The cash-releasing benefit is the expected 20,000 reduction in overtime spending; unchanged regular payroll cannot be presented as another realized cash reduction.

3. double counting

Turn 6. Double counting would add the overlapping time valuation and overtime saving as if they were independent benefits; the stated facts do not support an 80,000 combined saving.

4. net cash benefit

Turn 8. Net cash benefit for the stipulated first year is 20,000 expected spending reduction minus 15,000 one-off implementation cost, or 5,000, before any other changes excluded by the exercise.

5. run-rate benefit

Turn 10. The run-rate benefit expresses the recurring annual spending reduction at the assumed operating level; here it is 20,000, distinct from first-year net cash benefit after setup costs.

6. benefits owner

Turn 12. The benefits owner is accountable for tracking and supporting realization of the defined benefit; project completion alone does not establish that overtime spending has actually fallen.

[Return to the conversation, page 114](#)

Transfer exchange

1. 32

Consultant: The capacity valuation is \$32 thousand.

Turn 1. Eight hundred hours multiplied by forty dollars equals thirty-two thousand in time value, not automatically cash saved.

Additional case 2 / Explanations / continued

2. 12

Finance: The annual spending reduction is \$12 thousand.

Turn 2. The identified cash effect is the contractor-spending reduction, not the full time valuation.

3. 5

Consultant: First-year net cash benefit is \$5 thousand.

Turn 3. Twelve thousand less the seven-thousand one-off setup cost leaves five thousand on the stated assumptions.

4. double-count

Finance: Adding the overlapping time and spending indicators would double-count the benefit.

Turn 4. The contractor reduction arises within the same improvement, so the two indicators cannot be treated as independent additive savings.

[Return to the conversation, page 117](#)

Additional case 3 / Explanations

Extended conversation

1. baseline case

Turn 2. The baseline case uses 2,000 units, price 30, variable unit cost 18, and fixed cost 15,000, giving 2,000 times 12 minus 15,000 equals 9,000.

2. input register

Turn 4. The input register identifies the model's editable inputs, sources, units, and dates so an update can be traced rather than inferred from a cell's appearance.

3. sensitivity test

Turn 6. The sensitivity test varies volume alone to 1,800 units while holding the other inputs constant, producing 1,800 times 12 minus 15,000 equals 6,600.

4. hard-code

Turn 8. To hard-code the output here means replacing the calculation with a fixed value, breaking the model's ability to respond consistently to changed inputs.

5. assumptions log

Turn 10. The assumptions log records the basis, owner, approval, and limitations of assumed inputs; it complements the source records and allows later users to understand choices.

6. version control

Turn 14. Version control preserves identifiable model versions and a record of changes, allowing an approved baseline and subsequent updates to be distinguished and reviewed.

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Transfer exchange

1. 16

Analyst: Unit contribution is \$16 before fixed cost.

Turn 1. Forty dollars selling price minus twenty-four dollars variable unit cost gives sixteen dollars per unit.

Additional case 3 / Explanations / continued

2. 6,000

Consultant: The baseline monthly result is \$6,000.

Turn 2. Fifteen hundred units times sixteen dollars less eighteen thousand fixed cost equals six thousand.

3. 2,000

Analyst: The sensitivity result is \$2,000.

Turn 3. Twelve hundred fifty units times sixteen dollars less eighteen thousand gives two thousand, with other inputs unchanged.

4. forecast

Consultant: This sensitivity is not a demand forecast.

Turn 4. The exercise changes one input to test its effect; it does not predict which demand level will occur.

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Find a phrase by purpose

Client Discovery and Problem Definition

Clarify the purpose: What decision should this benchmark help you make?

State the real choice: The choice is centralization or continued separate operation.

Confirm the owner: The executive committee owns that decision.

[Full phrase bank, page 7](#)

Hypotheses and Issue Trees

Keep the explanation provisional: Price is a working hypothesis, not an established churn driver.

State the sample: We interviewed twenty of the sixty departing accounts.

Limit the percentage: Twelve of those twenty interviewees mentioned price.

[Full phrase bank, page 19](#)

Data Requests and Client Burden

Acknowledge the burden: The original list did not distinguish what we need first.

Explain the priority: Six measures support the first workshop analysis.

Specify the period: We need monthly figures from January through June for both centers.

[Full phrase bank, page 33](#)

Slide Storylines and Executive Synthesis

Lead with the request: We recommend a four-week pilot at one center.

State the amount: The budget request is twenty thousand dollars.

Limit the authorization: We are not asking for full rollout today.

[Full phrase bank, page 44](#)

Find a phrase by purpose / continued

Scope Management and Change Requests

Acknowledge the purpose: I understand why Market B has become important.

State the current agreement: The signed scope covers the six-week Market A study.

Name the additional request: A full Market B study is a change to that scope.

[Full phrase bank, page 57](#)

Difficult Client Feedback

Acknowledge the miss: You supplied the staffing limit, and we missed it.

State the consequence: Our recommendation depends on capacity that is not available.

Avoid a defensive qualifier: That omission is ours to correct.

[Full phrase bank, page 70](#)

Implementation and Change Management

Separate communication from readiness: Everyone received the announcement, but the launch conditions are not met.

State the training position: Ten of the twelve managers completed training.

State the practice position: Four have demonstrated the required tasks.

[Full phrase bank, page 84](#)

Steering Committees and Final Readouts

State the shared ground: We agree that the handoff problem needs to be addressed.

Name the unresolved choice: We have not agreed which option to implement.

Compare the estimates: Option B is estimated at sixty thousand dollars more and six weeks longer.

[Full phrase bank, page 97](#)

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acceptance criterion[Lesson 05, p. 55](#)**accountability**[Lesson 06, p. 69](#)**action title**[Lesson 04, p. 42](#)**aggregate**[Lesson 03, p. 31](#)**analytical priority**[Lesson 02, p. 18](#)**approval status**[Lesson 08, p. 96](#)**assumption log**[Lesson 05, p. 56](#)**assumptions log**[Case 3, p. 118](#)**backfill**[Lesson 07, p. 83](#)**baseline case**[Case 3, p. 118](#)**benefit realization**[Lesson 07, p. 83](#)**bottleneck**[Lesson 06, p. 69](#)**capacity assumption**[Lesson 06, p. 68](#)**capacity value**[Case 2, p. 113](#)**causal mechanism**[Lesson 02, p. 17](#)**centralization**[Lesson 01, p. 5](#)**change champion**[Lesson 07, p. 83](#)**change register**[Lesson 05, p. 56](#)**chart annotation**[Lesson 04, p. 43](#)**churn driver**[Lesson 02, p. 16](#)**client sign-off**[Lesson 06, p. 69](#)**client-reference permission**[Case 1, p. 108](#)**access permission**[Lesson 03, p. 32](#)**action owner**[Lesson 08, p. 96](#)**adoption**[Lesson 07, p. 82](#)**alternative explanation**[Lesson 02, p. 17](#)**appendix**[Lesson 04, p. 43](#)**approved asset**[Case 1, p. 108](#)**assumption register**[Lesson 06, p. 68](#)**automated reporting**[Lesson 08, p. 96](#)**baseline**[Lesson 01, p. 5](#)**benchmark**[Lesson 01, p. 5](#)**benefits owner**[Case 2, p. 113](#)**business-as-usual**[Lesson 07, p. 83](#)**capacity gap**[Lesson 06, p. 68](#)**cash-releasing benefit**[Case 2, p. 113](#)**caveat**[Lesson 04, p. 43](#)**change authorization**[Lesson 05, p. 55](#)**change management**[Lesson 07, p. 82](#)**change request**[Lesson 05, p. 55](#)**churn**[Lesson 02, p. 16](#)**client feedback**[Lesson 06, p. 68](#)**client sponsor**[Lesson 01, p. 5](#)**cohort**[Lesson 02, p. 17](#)

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References and publication notes

All cases, organizations, figures, and conversations are fictional teaching material, not transcripts. Communication practice does not replace qualified advice or current workplace procedures.

[1] McKinsey. How to master the seven-step problem-solving process (2019).

Background on problem definition, analytical priorities, and synthesis. The cases and language examples are original, not a reproduction of the interview. Source checked 1 October 2026.

<https://www.mckinsey.com/capabilities/strategy-and-corporate-finance/our-insights/how-to-master-the-seven-step-problem-solving-process>

[2] Association for Project Management. What is change control?

Terminology distinguishing a requested baseline change from an evaluated and authorized change. Fictional engagement terms supply the exercise decisions. Source checked 1 October 2026.

<https://www.apm.org.uk/resources/what-is-project-management/what-is-change-control/>

[3] Association for Project Management. What is change management and organisational change?

Background on organizational adoption and sustained change. Training, practice, ownership, and readiness details in the scenarios are invented. Source checked 1 October 2026.

<https://www.apm.org.uk/resources/what-is-project-management/what-is-change-management/>

[4] American Society for Quality. What is the Plan-Do-Check-Act cycle?

Background on small-scale testing and learning before wider change. Pilot thresholds and choices are fictional, not a prescribed professional method. Source checked 1 October 2026.

<https://asq.org/quality-resources/pdca-cycle>

Companion course

The website offers the eight-lesson course and related practice. This book can be used independently. No audio access or external account is needed for its exercises.

<https://englishladder.com/efsp-consulting.html>

Clarify the question. Make the recommendation usable.

Eight client-engagement lessons, from defining the decision and testing hypotheses to managing scope, preparing adoption, and recording the steering committee's actual decision.

Client Discovery and Problem Definition

A benchmark compares selected measures against a reference group. It does not itself decide the operating model. Different service hours, case complexity, or cost definitions can make apparently similar figures misleading unless the comparison is adjusted or qualified.

Data Requests and Client Burden

A smaller first request is not a waiver of definitions or quality. Confirm what completed, reopened, and opening mean in the existing reports, along with units, cost scope, and monthly coverage. A timely file with misunderstood fields can produce a misleading comparison.

Hypotheses and Issue Trees

Twelve of twenty interviewees mentioned price: 60% of that interview group. It is not evidence that price caused 60% of all sixty departures. The price, service, and competitor counts overlap because respondents could give more than one answer.

Slide Storylines and Executive Synthesis

Twelve minutes is the current median, not necessarily the mean. Ten minutes is a proposed threshold, not an achieved result. The 2% error guardrail needs a defined numerator, denominator, and eligible-case population so faster work does not conceal a quality problem.

Clarify the question. Make the recommendation usable. / continued

Phil Stilwell

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English Ladder / English for Work / Revised 2026 edition

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