

ENGLISH FOR WORK / ENGLISH FOR POST-ACQUISITION INTEGRATION

Cross-Border M&A Integration **English**

Keep the business running while the organizations come together.



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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 Protecting Day 1 business continuity, page 4](#)

Separate legal closing, immediate operating needs, and later integration milestones.

[02 Clarifying integration decision rights, page 14](#)

Separate coordination, consultation, and approval when a workstream decision crosses functions.

[03 Turning blunt disagreement into a workable decision, page 26](#)

Respond to direct challenge, identify the underlying constraint, and establish a shared discussion norm.

[04 Handling HR differences without inventing assurances, page 36](#)

Explain a proposed HR change while preserving local review, current instructions, and employee trust.

[05 Running a cross-functional IT cutover conversation, page 48](#)

Explain a hidden system dependency and distinguish technical readiness from a go-live decision.

[06 Keeping customer communications and payment changes controlled, page 58](#)

Explain continuity to a customer while separating branding, contracting identity, and verified payment instructions.

[07 Reporting integration synergies without double counting, page 70](#)

Reconcile annualized savings, realized results, and integration costs on a defined reporting basis.

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Confirm acceptance evidence, ongoing support, and residual-risk ownership before closing integration work.

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

Ownership changes faster than operating habits.

After closing, consultants need to coordinate decisions without assuming that legal ownership instantly merges systems, contracts, policies, or trust. Clear English makes dependencies and authority visible while keeping customers and employees informed.

Separate closing from integration

A completed acquisition does not mean every system, process, or contract has moved. Day 1 continuity and the target operating model are different milestones.

"The transaction has closed; payroll is continuing on the existing approved process."

Ask about local practice

Teams may differ in how they challenge proposals, seek agreement, or escalate problems. Describe the observed practice rather than explaining it through nationality.

"Does silence here mean agreement, or do we need an explicit decision?"

Keep authority specific

A sponsor endorsement, consultant recommendation, and authorized operational decision can be different steps. Name the actual decision owner and required reviews.

"The sponsor supports the objective; the process change still needs the stated approval."

Report value on a defined basis

An annualized saving, an in-period result, and a forecast are different measures. Agree a baseline and avoid counting the same benefit in two workstreams.

"That is the run rate; the realized quarterly amount is reported separately."

Professional boundaries

All people, organizations, cases, figures, and documents in the exercises are fictional. Professional English practice, not legal, employment, tax, accounting, cybersecurity, or transaction advice. All decision matrices, service arrangements, dates, and approval rules in the cases are fictional. Actual integration must follow the transaction documents, current law, employment and privacy requirements, customer obligations, authorized controls, and qualified local advice. No exercise authorizes a policy change, access grant, payment change, system cutover, or workforce decision. Organizational differences are not claims about every person from a country.

A Read the situation

LESSON 01 / PROTECTING DAY 1 BUSINESS CONTINUITY

Separate legal closing, immediate operating needs, and later integration milestones.

The deal closed; the payroll process did not move overnight

An overseas buyer completed the acquisition of a fictional US business on Friday. On Monday, employees must be able to enter the site, receive support, and follow the existing approved payroll process. The shared HR platform is not ready, and no immediate payroll migration is authorized. Integration consultant Aya and US operations lead Marcus prioritize continuity and identify the later migration work separately.

People: Aya, Integration consultant; Marcus, US operations lead.

Read the record

Choose one answer per question using the facts above.

1. What has been completed?

- A. An authorized payroll migration
- B. Every future operating-model change
- C. Legal acquisition closing
- D. Full HR-platform integration

2. Which process continues under the supplied plan?

- A. The existing approved payroll process
- B. An unapproved new payroll platform
- C. A temporary employee-funded payroll workaround
- D. No payroll process at all

3. What should be separated from Monday continuity?

- A. The fact of the completed closing
- B. Employee questions about immediate operations
- C. The later platform migration
- D. Site access and support availability

[Answers and explanations, page 106](#)

B Vocabulary in use

CORE TERMS

legal close

Completion of the transaction under its actual closing requirements.

confirm legal close

business continuity

Ability to sustain required operations through change or disruption.

protect business continuity

workstream

Defined area of coordinated integration work.

lead the HR workstream

minimum operating requirement

Condition needed for the specified operation to function.

define minimum operating requirements

standalone capability

Ability to perform a function without the temporary support being replaced.

establish standalone capability

target operating model

Intended future arrangement of roles, processes, and systems.

define the target operating model

Day 1 readiness

Preparedness for required operations immediately after closing.

assess Day 1 readiness

integration management office

Team coordinating integration governance and workstreams.

establish the integration management office

critical service

Service whose interruption materially affects required operations.

identify critical services

transition service agreement

Contract for specified temporary support during a transition.

review the transition service agreement

interim operating model

Temporary arrangement used during transition.

document the interim operating model

readiness checkpoint

Defined review of whether prerequisites are met.

hold a readiness checkpoint

Say it in context

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

legal close LEGAL CLOSE

confirm legal close

Keep the meaning precise: Completion of the transaction under its actual closing requirements.

critical service CRITICAL SERVICE

identify critical services

Keep the meaning precise: Service whose interruption materially affects required operations.

B Precision and professional shorthand

EXTEND YOUR RANGE

dependency

Requirement or preceding activity on which another task relies.

map the dependency

hypercare

Time-limited heightened support after a transition.

plan hypercare coverage

critical-path item

Task whose timing can constrain the overall sequence.

identify a critical-path item

clarification request

Question that resolves an unclear meaning or instruction.

make a targeted clarification request

working assumption

Provisional premise used while information is incomplete.

challenge a working assumption

action owner

Named person responsible for a specified next step.

confirm the action owner

continuity owner

Person accountable for keeping a specified operation functioning.

name the continuity owner

service desk

Contact function handling user support requests.

brief the service desk

Day 100 milestone

Stated later integration target, not a universal legal deadline.

review the Day 100 milestone

source attribution

Identification of where information came from.

preserve source attribution

scope boundary

Limit of the work or authority being discussed.

state the scope boundary

check-back

Restatement used to verify that a message was understood.

complete a check-back

Say it in context

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

readiness checkpoint READINESS CHECKPOINT

hold a readiness checkpoint

Keep the meaning precise: Defined review of whether prerequisites are met.

critical-path item CRITICAL-PATH ITEM

identify a critical-path item

Keep the meaning precise: Task whose timing can constrain the overall sequence.

Phrases that move the work forward

Separate milestones

Closing is complete; platform integration is not.

Preserve the current plan

Payroll remains on the existing approved process.

Name responsibility

Who owns continuity if the new platform is delayed?

Keep support visible

Employees need one clear support route for the transition.

Clarify the question

Are you asking about the finding or the next step?

Attribute information

That is what the current record says; it has not been independently confirmed.

Check scope

That decision sits outside my authority.

Repair misunderstanding

Let me restate the distinction more clearly.

Prioritize continuity

Which services must work when employees arrive on Monday?

Identify dependency

Migration depends on readiness checks and the required authorization.

Explain the interim state

This is the temporary operating arrangement, not the final design.

Report accurately

We are ready for the stated Day 1 scope, not every future integration change.

Invite correction

Please correct me if I have misunderstood that detail.

Separate possibility

That is a possibility, not an agreed outcome.

Pin down responsibility

Who is responsible for that specific next step?

Close an exchange

We agree on the action, the owner, and the point for review.

Precision in real exchanges

Purpose: Identify dependency

Useful wording: Migration depends on readiness checks and the required authorization.

Purpose: Name responsibility

Useful wording: Who owns continuity if the new platform is delayed?

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 Monday message is supported?

- A.** All policies changed automatically at closing
- B.** Integration is complete because ownership changed
- C.** Payroll continues under the existing approved process
- D.** Every employee moves to the new platform immediately

2. Which question identifies continuity responsibility?

- A.** Who owns payroll operation during the transition?
- B.** Which logo should be larger?
- C.** Can we assume the buyer handles every detail?
- D.** Does legal close erase the need for support?

3. A colleague needs the term for this meaning: Team coordinating integration governance and workstreams. Which term fits?

- A.** standalone capability
- B.** working assumption
- C.** hypercare
- D.** integration management office

D Choose the response that fits / continued

4. Rebuild the exchange from "The deal closed; the payroll process did not move overnight". Aya: "Payroll currently runs through the existing approved process. No one has authorized moving it to the new platform this week." Marcus: [missing response] Aya: "Some colleagues may see the old process continuing as a sign that the local team is resisting the acquisition." Which response belongs in the gap?

- A.** Keep that business continuity message explicit. Employees should not infer a pay-process change from a new ownership announcement.
- B.** Exactly. Day 1 readiness means site access, support, and the approved payroll process work within the agreed immediate scope.
- C.** Assign a continuity owner and an escalation route rather than leave responsibility attached only to a department name.
- D.** We should separate legal close from the operating changes. Ownership changed, but the shared HR platform is not ready.

[Answers and explanations, page 106](#)

One useful distinction

Legal close and completed integration are different. The supplied Monday plan preserves the existing payroll process; it does not authorize immediate migration.

E Conversation

The deal closed; the payroll process did not move overnight

The deal closed; the payroll process did not move overnight

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

WORD AND PHRASE BANK

legal close / dependency / target operating model / integration management office /
readiness checkpoint / Day 1 readiness / continuity owner / interim operating model /
business continuity / service desk

- 01 **Aya:** The acquisition closed on Friday. Headquarters would like Monday's message to say that everyone is now fully integrated.
- 02 **Marcus:** We should separate ¹ _____ from the operating changes. Ownership changed, but the shared HR platform is not ready.
- 03 **Aya:** Then the first question is what must function when employees arrive, rather than how many new processes we can announce.
- 04 **Marcus:** Exactly. ² _____ means site access, support, and the approved payroll process work within the agreed immediate scope.
- 05 **Aya:** Payroll currently runs through the existing approved process. No one has authorized moving it to the new platform this week.
- 06 **Marcus:** Keep that ³ _____ message explicit. Employees should not infer a pay-process change from a new ownership announcement.
- 07 **Aya:** Some colleagues may see the old process continuing as a sign that the local team is resisting the acquisition.
- 08 **Marcus:** It is our ⁴ _____, not a statement that the organization will never change. Explain its purpose and limits.
- 09 **Aya:** The later migration still matters, but we need to identify the testing, data, access, and approval work before scheduling it.
- 10 **Marcus:** Put those items in the ⁵ _____ map so the schedule reflects what actually has to happen first.

Conversation continues on the next page.

The deal closed; the payroll process did not move overnight

CONVERSATION / CONTINUED

- 11 **Aya:** Who should coordinate those items across HR, IT, finance, and the local business without taking over every operational decision?
- 12 **Marcus:** The ⁶ _____ can coordinate the workstreams while the actual functional owners retain their defined responsibilities.
- 13 **Aya:** We also need a named person responsible if employees cannot access the payroll support channel on Monday.
- 14 **Marcus:** Assign a ⁷ _____ and an escalation route rather than leave responsibility attached only to a department name.
- 15 **Aya:** The service desk needs a clear briefing on what changes now, what stays the same, and where to route unanswered questions.
- 16 **Marcus:** Yes. The ⁸ _____ should not tell employees to use a platform that has not been released or supported.
- 17 **Aya:** Before the later migration, we can review the actual evidence that the required tests and authorizations are complete.
- 18 **Marcus:** That is the purpose of a ⁹ _____. A target date should not substitute for verified readiness.
- 19 **Aya:** I will revise the message: the transaction has closed, immediate operations continue under the stated plan, and migration work remains scheduled for review.
- 20 **Marcus:** Good. The ¹⁰ _____ can remain our destination without being announced as a completed fact on the first working day.

CHECK THE GAPS

1. legal close / 2. Day 1 readiness / 3. business continuity / 4. interim operating model / 5. dependency / 6. integration management office / 7. continuity owner / 8. service desk / 9. readiness checkpoint / 10. target operating model

[Why these answers fit, page 107](#)

F Check accuracy and scope

The deal closed; the payroll process did not move overnight

Return to the case

An overseas buyer completed the acquisition of a fictional US business on Friday. On Monday, employees must be able to enter the site, receive support, and follow the existing approved payroll process. The shared HR platform is not ready, and no immediate payroll migration is authorized. Integration consultant Aya and US operations lead Marcus prioritize continuity and identify the later migration work separately.

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

1. What should a readiness statement include?

- A. Only a green color without definition
- B. A promise that every future change is complete
- C. A claim that no dependency can delay work
- D. The specific services and scope checked

2. Which action is not authorized by the case?

- A. Migrating payroll immediately
- B. Keeping the support route clear
- C. Recording the platform dependency
- D. Identifying the continuity owner

[Answers and explanations, page 109](#)

Listen for the distinction

Switch roles and deliver the Monday message without announcing an unauthorized payroll change.

Continuity is a deliberate first-day result

A familiar process continuing after closing is not necessarily resistance. Ask which changes are required now and which depend on later readiness.

F Say it / transfer to a new case

The logo changed before the support route

The employee portal has new branding, but the approved support process remains unchanged. The shared support platform has not launched.

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

launched / changed / unchanged / process

- 01 **Employee:** The branding has ¹ _____.
- 02 **Consultant:** The approved support route remains ² _____.
- 03 **Employee:** The shared platform has not ³ _____.
- 04 **Consultant:** Use the current approved ⁴ _____.

CHECK THE GAPS

1. changed / 2. unchanged / 3. launched / 4. process

[Why these answers fit, page 109](#)

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 deal closed; the payroll process did not move overnight". Aya: "We also need a named person responsible if employees cannot access the payroll support channel on Monday." Marcus: [missing response] Aya: "The service desk needs a clear briefing on what changes now, what stays the same, and where to route unanswered questions." Which response belongs in the gap?

- A.** Keep that business continuity message explicit. Employees should not infer a pay-process change from a new ownership announcement.
- B.** Assign a continuity owner and an escalation route rather than leave responsibility attached only to a department name.
- C.** Exactly. Day 1 readiness means site access, support, and the approved payroll process work within the agreed immediate scope.
- D.** We should separate legal close from the operating changes. Ownership changed, but the shared HR platform is not ready.

[Answers and explanations, page 110](#)

A Read the situation

LESSON 02 / CLARIFYING INTEGRATION DECISION RIGHTS

Separate coordination, consultation, and approval when a workstream decision crosses functions.

Sponsor support is not process-change authorization

A global sponsor supports standardizing customer credit terms. The fictional integration decision matrix requires finance ownership, local legal consultation, and steering-committee approval before the US process changes. Consultant Leo coordinates the proposal but cannot approve it. The sales workstream asks to implement immediately because the sponsor liked the concept. None of the required decision steps has been completed.

People: Leo, Integration consultant; Priya, Sales workstream lead.

Read the record

Choose one answer per question using the facts above.

1. What did the sponsor provide?

- A.** Local legal review
- B.** Authorization from every process owner
- C.** Support for the standardization concept
- D.** Completed steering approval

2. Who coordinates but cannot approve the change?

- A.** The authorized finance owner
- B.** The local legal reviewer
- C.** Leo
- D.** The steering committee under the supplied matrix

3. Which sequence is required before implementation here?

- A.** Sales preference alone
- B.** Sponsor enthusiasm alone
- C.** A new slide title
- D.** Finance ownership, local legal consultation, and steering approval

[Answers and explanations, page 111](#)

B Vocabulary in use

CORE TERMS

decision rights

Defined authority over specified decisions.

clarify decision rights

steering committee

Body directing specified program decisions under its mandate.

seek steering-committee approval

process owner

Person accountable for a defined operational process.

confirm the process owner

accountable role

Role answerable for the specified outcome under the actual matrix.

identify the accountable role

informed stakeholder

Person kept updated without necessarily making the decision.

notify informed stakeholders

escalation path

Route for raising unresolved issues to the appropriate authority.

use the escalation path

governance charter

Document defining the program's governance arrangements.

review the governance charter

executive sponsor

Senior supporter accountable for the initiative under the defined role.

brief the executive sponsor

RACI matrix

Responsibility map distinguishing responsible, accountable, consulted, and informed roles.

use the RACI matrix

consulted stakeholder

Person whose input is sought under the stated process.

involve consulted stakeholders

approval gate

Point requiring the specified authorization before proceeding.

complete the approval gate

decision log

Record of decisions, rationale, authority, and conditions.

update the decision log

Say it in context

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

decision rights **DECISION RIGHTS**

clarify decision rights

Keep the meaning precise: Defined authority over specified decisions.

RACI matrix **RACI MATRIX**

use the RACI matrix

Keep the meaning precise: Responsibility map distinguishing responsible, accountable, consulted, and informed roles.

B Precision and professional shorthand

EXTEND YOUR RANGE

issue log

Record of current problems needing resolution.
maintain the issue log

change request

Formal proposal to alter an agreed scope, process, or plan.
submit a change request

cross-functional dependency

Requirement linking work across functional teams.
resolve cross-functional dependencies

clarification request

Question that resolves an unclear meaning or instruction.
make a targeted clarification request

working assumption

Provisional premise used while information is incomplete.
challenge a working assumption

action owner

Named person responsible for a specified next step.
confirm the action owner

RAID log

Program record of risks, assumptions, issues, and dependencies under the stated convention.
reconcile the RAID log

delegated authority

Decision power specifically granted to another role.
verify delegated authority

decision latency

Time between raising a decision need and resolving it.
reduce decision latency

source attribution

Identification of where information came from.
preserve source attribution

scope boundary

Limit of the work or authority being discussed.
state the scope boundary

check-back

Restatement used to verify that a message was understood.
complete a check-back

Say it in context

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

decision log **DECISION LOG**

update the decision log

Keep the meaning precise: Record of decisions, rationale, authority, and conditions.

cross-functional dependency **CROSS-FUNCTIONAL DEPENDENCY**

resolve cross-functional dependencies

Keep the meaning precise: Requirement linking work across functional teams.

Phrases that move the work forward

Separate support and approval

The sponsor supports the concept; the process change is not yet authorized.

Invite the right review

Local legal input is required before the decision.

Keep momentum

Let us name the decision owner and the information needed.

Record the condition

The decision log must retain any conditions attached to approval.

Priya / in the conversation

The sponsor liked our standard credit-terms proposal.

Leo / in the conversation

We need to distinguish support from decision rights.

Priya / in the conversation

The sponsor is senior, so I assumed the positive reaction replaced the remaining steps.

Priya / in the conversation

Finance needs to assess collection risk and how the proposed terms affect the current customer process.

Name the owner

Finance owns this process under the agreed matrix.

Define your role

I can coordinate the proposal, but I cannot approve it.

Use the escalation route

If the decision is delayed, we escalate through the stated path.

Prevent duplicate instructions

We need one authorized instruction for the affected teams.

Priya / in the conversation

Sales wants to start using it in the US business tomorrow.

Leo / in the conversation

The agreed matrix still requires finance ownership, local legal input, and steering approval.

Leo / in the conversation

The executive sponsor supports the objective, but we have not received an instruction changing the stated approval route.

Leo / in the conversation

Finance is the process owner under this matrix, rather than merely a team we inform after implementation.

Precision in real exchanges

Purpose: Define your role

Useful wording: I can coordinate the proposal, but I cannot approve it.

Purpose: Keep momentum

Useful wording: Let us name the decision owner and the information needed.

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 preserves momentum and governance?

- A.** Implement because the sponsor smiled at the slide
- B.** Let each workstream choose its own terms
- C.** Record approval before anyone decides
- D.** Coordinate the required reviews and decision request

2. Which statement accurately describes Leo's role?

- A.** He alone changes customer contracts
- B.** He coordinates the proposal without approving it
- C.** He may override the decision matrix
- D.** He replaces local legal counsel

3. A colleague needs the term for this meaning: Senior supporter accountable for the initiative under the defined role. Which term fits?

- A.** executive sponsor
- B.** working assumption
- C.** informed stakeholder
- D.** change request

D Choose the response that fits / continued

4. Rebuild the exchange from "Sponsor support is not process-change authorization". Priya: "Finance needs to assess collection risk and how the proposed terms affect the current customer process." Leo: [missing response] Priya: "Local legal counsel also needs to check the actual customer arrangements before we assume the global wording can be used unchanged." Which response belongs in the gap?

- A.** The executive sponsor supports the objective, but we have not received an instruction changing the stated approval route.
- B.** Put that in the decision log, along with the owner responsible for communicating and implementing the authorized change.
- C.** That is the required consulted stakeholder role here. Consultation is not optional simply because the desired outcome is familiar.
- D.** Yes. Finance is the process owner under this matrix, rather than merely a team we inform after implementation.

[Answers and explanations, page 111](#)

One useful distinction

The sponsor supports the objective. Under the supplied matrix, finance ownership, local legal consultation, and steering approval are still required before implementation.

Conversation

Sponsor support is not process-change authorization

Sponsor support is not process-change authorization

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

WORD AND PHRASE BANK

escalation path / decision rights / process owner / approval gate / change request /
consulted stakeholder / cross-functional dependency / decision log / executive sponsor /
delegated authority

- 01 **Priya:** The sponsor liked our standard credit-terms proposal. Sales wants to start using it in the US business tomorrow.
- 02 **Leo:** We need to distinguish support from ¹ _____. The agreed matrix still requires finance ownership, local legal input, and steering approval.
- 03 **Priya:** The sponsor is senior, so I assumed the positive reaction replaced the remaining steps.
- 04 **Leo:** The ² _____ supports the objective, but we have not received an instruction changing the stated approval route.
- 05 **Priya:** Finance needs to assess collection risk and how the proposed terms affect the current customer process.
- 06 **Leo:** Yes. Finance is the ³ _____ under this matrix, rather than merely a team we inform after implementation.
- 07 **Priya:** Local legal counsel also needs to check the actual customer arrangements before we assume the global wording can be used unchanged.
- 08 **Leo:** That is the required ⁴ _____ role here. Consultation is not optional simply because the desired outcome is familiar.
- 09 **Priya:** What can you decide as the integration consultant, and what needs to stay with the functional and steering roles?
- 10 **Leo:** I can coordinate the ⁵ _____, assemble the dependencies, and track the decision. I cannot approve this process change myself.

Conversation continues on the next page.

Sponsor support is not process-change authorization

CONVERSATION / CONTINUED

- 11 **Priya:** We need a clear request with the proposed scope, affected customers, risks, and the question the committee must answer.
- 12 **Leo:** That will make the ⁶ _____ more useful than sending a general slide and hoping everyone interprets the next step the same way.
- 13 **Priya:** If a reviewer does not respond quickly, sales still needs a way to raise the timing risk.
- 14 **Leo:** Use the agreed ⁷ _____. We can escalate the delay without treating silence as consent.
- 15 **Priya:** The sales and finance leads should not send conflicting instructions to the US team while the decision remains open.
- 16 **Leo:** Correct. The ⁸ _____ needs one coordinated status and an eventual authorized instruction.
- 17 **Priya:** Once the committee decides, we should record exactly what was approved and any conditions, rather than only marking the slide green.
- 18 **Leo:** Put that in the ⁹ _____, along with the owner responsible for communicating and implementing the authorized change.
- 19 **Priya:** I will tell sales that the concept is supported and the required review and approval are still outstanding.
- 20 **Leo:** Good. That reduces confusion about ¹⁰ _____ while keeping the proposal moving through the people who can properly decide it.

CHECK THE GAPS

1. decision rights / 2. executive sponsor / 3. process owner / 4. consulted stakeholder / 5. change request / 6. approval gate / 7. escalation path / 8. cross-functional dependency / 9. decision log / 10. delegated authority

[Why these answers fit, page 112](#)

F Check accuracy and scope

Sponsor support is not process-change authorization

Return to the case

A global sponsor supports standardizing customer credit terms. The fictional integration decision matrix requires finance ownership, local legal consultation, and steering-committee approval before the US process changes. Consultant Leo coordinates the proposal but cannot approve it. The sales workstream asks to implement immediately because the sponsor liked the concept. None of the required decision steps has been completed.

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

1. What belongs in a decision log?

- A. Actual decision, authority, rationale, and conditions
- B. Only a positive color
- C. A proposed outcome labeled complete
- D. An unsupported claim that silence means consent

2. What should happen if a required decision is delayed?

- A. Ask employees to infer a policy
- B. Use the stated escalation path
- C. Treat delay as automatic approval
- D. Bypass every reviewer

[Answers and explanations, page 114](#)

Listen for the distinction

Switch roles and state the supplied decision sequence without inventing delegated authority.

Ask who decides without sounding territorial

Decision clarity prevents duplicate instructions and premature implementation. A consultant can keep momentum while respecting the actual approval route.

F Say it / transfer to a new case

Consultation was recorded as approval

Local legal counsel provides comments on a proposal. The steering committee has not decided. A status slide incorrectly says 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

comments / authority / record / outstanding

- 01 **Lead:** Legal has provided ¹ _____.
- 02 **Consultant:** Steering approval remains ² _____.
- 03 **Lead:** The status label overstated the ³ _____.
- 04 **Consultant:** Correct the decision ⁴ _____.

CHECK THE GAPS

1. comments / 2. outstanding / 3. authority / 4. record

[Why these answers fit, page 114](#)

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 "Sponsor support is not process-change authorization".
Priya: "If a reviewer does not respond quickly, sales still needs a way to raise the timing risk." **Leo:** [missing response] **Priya:** "The sales and finance leads should not send conflicting instructions to the US team while the decision remains open." Which response belongs in the gap?

- A.** Use the agreed escalation path. We can escalate the delay without treating silence as consent.
- B.** The executive sponsor supports the objective, but we have not received an instruction changing the stated approval route.
- C.** Yes. Finance is the process owner under this matrix, rather than merely a team we inform after implementation.
- D.** Correct. The cross-functional dependency needs one coordinated status and an eventual authorized instruction.

[Answers and explanations, page 115](#)

Review 1 / Meaning and context

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

Case file

Revisit "Protecting Day 1 business continuity" and "Clarifying integration decision rights". 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: Ability to sustain required operations through change or disruption. Which term fits?

- A. continuity owner
- B. transition service agreement
- C. business continuity
- D. source attribution

2. A colleague needs the term for this meaning: Person whose input is sought under the stated process. Which term fits?

- A. consulted stakeholder
- B. issue log
- C. decision rights
- D. clarification request

3. Rebuild the exchange from "The deal closed; the payroll process did not move overnight". Aya: "The later migration still matters, but we need to identify the testing, data, access, and approval work before scheduling it." Marcus: [missing response] Aya: "Who should coordinate those items across HR, IT, finance, and the local business without taking over every operational decision?" Which response belongs in the gap?

- A. That is the purpose of a readiness checkpoint. A target date should not substitute for verified readiness.
- B. Keep that business continuity message explicit. Employees should not infer a pay-process change from a new ownership announcement.
- C. Put those items in the dependency map so the schedule reflects what actually has to happen first.
- D. The integration management office can coordinate the workstreams while the actual functional owners retain their defined responsibilities.

Review 1 / Meaning and context / continued

4. Rebuild the exchange from "Sponsor support is not process-change authorization". Priya: "Once the committee decides, we should record exactly what was approved and any conditions, rather than only marking the slide green." Leo: [missing response] Priya: "I will tell sales that the concept is supported and the required review and approval are still outstanding." Which response belongs in the gap?

- A.** Put that in the decision log, along with the owner responsible for communicating and implementing the authorized change.
- B.** That is the required consulted stakeholder role here. Consultation is not optional simply because the desired outcome is familiar.
- C.** Yes. Finance is the process owner under this matrix, rather than merely a team we inform after implementation.
- D.** The executive sponsor supports the objective, but we have not received an instruction changing the stated approval route.

[Answers and explanations, page 146](#)

A Read the situation

LESSON 03 / TURNING BLUNT DISAGREEMENT INTO A WORKABLE DECISION

Respond to direct challenge, identify the underlying constraint, and establish a shared discussion norm.

That timeline will not work is a request to test the plan

In the acquired US team, operations lead Jordan says the proposed Tuesday supplier cutover will not work because quality approval is still outstanding. Integration consultant Lina initially hears the direct objection as rejection of headquarters. Their previous organizations used different meeting habits. The actual issue is an uncompleted approval, not established hostility. They need explicit agreement and a clear boundary against personal attacks.

People: Jordan, US operations lead; Lina, Integration consultant.

Read the record

Choose one answer per question using the facts above.

1. What concrete constraint does Jordan identify?

- A.** The local team refuses every change
- B.** Quality approval is outstanding
- C.** Headquarters has no legal ownership
- D.** The supplier has already failed every test

2. What is not established by the direct objection?

- A.** An unresolved approval
- B.** A difference in meeting habits
- C.** Hostile intent toward headquarters
- D.** A challenge to the timeline

3. What should the team make explicit?

- A.** Permission to attack colleagues personally
- B.** The concern, decision status, and discussion boundary
- C.** A rule that silence always means approval
- D.** A national stereotype about every employee

[Answers and explanations, page 116](#)

B Vocabulary in use

CORE TERMS

working norm

Agreed way a team conducts recurring work.
establish working norms

constructive dissent

Reasoned disagreement intended to improve a decision.
invite constructive dissent

face-saving language

Wording that preserves dignity while addressing a difficult point.
use face-saving language

impact statement

Description of how an action or message affects the work.
make an impact statement

explicit agreement

Clearly stated acceptance rather than inferred assent.
obtain explicit agreement

local constraint

Requirement or limitation affecting the local operation.
identify a local constraint

challenge protocol

Agreed method for questioning proposals or assumptions.
define a challenge protocol

psychological safety

Ability to raise questions or concerns without inappropriate interpersonal punishment.
support psychological safety

intent clarification

Question checking what a speaker means or aims to do.
seek intent clarification

decision norm

Shared expectation for how agreement and decisions are established.
clarify the decision norm

tacit assumption

Unspoken premise influencing interpretation or action.
surface a tacit assumption

integration friction

Difficulty arising as organizations combine practices and expectations.
address integration friction

Say it in context

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

working norm WORKING NORM

establish working norms

Keep the meaning precise: Agreed way a team conducts recurring work.

intent clarification INTENT CLARIFICATION

seek intent clarification

Keep the meaning precise: Question checking what a speaker means or aims to do.

B Precision and professional shorthand

EXTEND YOUR RANGE

shared vocabulary

Agreed meanings for recurring terms across teams.

establish a shared vocabulary

disagreement boundary

Limit separating legitimate challenge from personal attack or misconduct.

state the disagreement boundary

alignment check

Explicit test of whether participants share the same understanding.

conduct an alignment check

clarification request

Question that resolves an unclear meaning or instruction.

make a targeted clarification request

working assumption

Provisional premise used while information is incomplete.

challenge a working assumption

action owner

Named person responsible for a specified next step.

confirm the action owner

pre-read

Material circulated before a meeting for preparation.

circulate a focused pre-read

repair statement

Wording correcting a misunderstanding or relational impact.

offer a repair statement

meeting closeout

Final confirmation of decisions, open issues, and actions.

complete the meeting closeout

source attribution

Identification of where information came from.

preserve source attribution

scope boundary

Limit of the work or authority being discussed.

state the scope boundary

check-back

Restatement used to verify that a message was understood.

complete a check-back

Say it in context

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

integration friction INTEGRATION FRICTION

address integration friction

Keep the meaning precise: Difficulty arising as organizations combine practices and expectations.

alignment check ALIGNMENT CHECK

conduct an alignment check

Keep the meaning precise: Explicit test of whether participants share the same understanding.

Phrases that move the work forward

Invite the constraint

Which part of the Tuesday plan will fail, and why?

Respond firmly

We can challenge the proposal without attacking the people who prepared it.

Name the blocker

Quality approval is still outstanding.

Check agreement

Please state whether you agree with the next step or have a remaining objection.

Jordan / in the conversation

We still do not have quality approval, and the schedule treats it as complete.

Jordan / in the conversation

I support the change, but the local quality team has not approved the supplier transition.

Lina / in the conversation

I initially heard the direct wording as a rejection of headquarters.

Jordan / in the conversation

A strong objection to a plan was not meant as an attack on its author.

Clarify intent

Are you challenging the date or the overall integration goal?

Preserve dignity

I may have read your direct wording differently than you intended.

Separate support and readiness

We support the goal, but this dependency is unresolved.

Close precisely

We have agreed to resolve the approval issue, not to proceed Tuesday regardless.

Lina / in the conversation

Is this constructive dissent about the date, or are you objecting to the integration goal itself?

Lina / in the conversation

Then the local constraint needs to be visible.

Jordan / in the conversation

In our previous meetings, we tested proposals aloud.

Lina / in the conversation

Our earlier working norm was to resolve most objections before the meeting, so the same wording landed differently for me.

Precision in real exchanges

Purpose: Preserve dignity

Useful wording: I may have read your direct wording differently than you intended.

Purpose: Name the blocker

Useful wording: Quality approval is still outstanding.

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 best clarifies the objection?

- A.** Your objection proves disloyalty
- B.** We should proceed because the wording was blunt
- C.** Is the issue the Tuesday date or the integration goal?
- D.** Why does your whole country resist change?

2. Which sentence protects the discussion boundary?

- A.** Headquarters proposals cannot be questioned
- B.** Challenge the plan with evidence, not the people
- C.** Every insult is acceptable if it is direct
- D.** Local staff may never disagree publicly

3. A colleague needs the term for this meaning: Ability to raise questions or concerns without inappropriate interpersonal punishment. Which term fits?

- A.** explicit agreement
- B.** working assumption
- C.** psychological safety
- D.** disagreement boundary

D Choose the response that fits / continued

4. Rebuild the exchange from "That timeline will not work is a request to test the plan". Jordan: "In our previous meetings, we tested proposals aloud. A strong objection to a plan was not meant as an attack on its author." Lina: [missing response] Jordan: "We can adapt without making people hide a real blocker. I would rather explain the approval gap than let the schedule fail." Which response belongs in the gap?

- A.** Agreed. Let us use a challenge protocol: name the issue, explain the evidence, and identify what decision or action is needed.
- B.** Our earlier working norm was to resolve most objections before the meeting, so the same wording landed differently for me.
- C.** Then build a shared vocabulary around those statuses. A willing supplier and an approved transition are not the same thing.
- D.** Then the local constraint needs to be visible. I initially heard the direct wording as a rejection of headquarters.

[Answers and explanations, page 116](#)

One useful distinction

Jordan challenges the Tuesday cutover because quality approval is outstanding. That does not establish opposition to the acquisition or personal hostility.

E Conversation

That timeline will not work is a request to test the plan

That timeline will not work is a request to test the plan

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

WORD AND PHRASE BANK

constructive dissent / repair statement / meeting closeout / challenge protocol /
local constraint / shared vocabulary / pre-read / disagreement boundary /
explicit agreement / working norm

- 01 **Jordan:** That Tuesday cutover will not work. We still do not have quality approval, and the schedule treats it as complete.
- 02 **Lina:** I want to check your meaning. Is this ¹ _____ about the date, or are you objecting to the integration goal itself?
- 03 **Jordan:** The date is the problem. I support the change, but the local quality team has not approved the supplier transition.
- 04 **Lina:** Then the ² _____ needs to be visible. I initially heard the direct wording as a rejection of headquarters.
- 05 **Jordan:** In our previous meetings, we tested proposals aloud. A strong objection to a plan was not meant as an attack on its author.
- 06 **Lina:** Our earlier ³ _____ was to resolve most objections before the meeting, so the same wording landed differently for me.
- 07 **Jordan:** We can adapt without making people hide a real blocker. I would rather explain the approval gap than let the schedule fail.
- 08 **Lina:** Agreed. Let us use a ⁴ _____: name the issue, explain the evidence, and identify what decision or action is needed.
- 09 **Jordan:** That would also help distinguish a specific objection from a vague statement that everything about the integration is wrong.
- 10 **Lina:** Yes, and we need a ⁵ _____. Challenge the proposal firmly, but do not attack the people or make assumptions about their competence or nationality.

Conversation continues on the next page.

That timeline will not work is a request to test the plan

CONVERSATION / CONTINUED

- 11 **Jordan:** I can restate my point: the Tuesday plan depends on quality approval, which is still outstanding, so readiness is not established.
- 12 **Lina:** Thank you. My ⁶ _____ is that I read your intent too broadly. The constraint is legitimate, and we should address it directly.
- 13 **Jordan:** Some colleagues stayed silent after the first discussion. We should not assume that means they accepted the date.
- 14 **Lina:** Correct. We need ⁷ _____ on the next action and the eventual decision, using the actual approval process.
- 15 **Jordan:** A short note before the next meeting could identify the pending approval, its owner, and the evidence needed to resolve it.
- 16 **Lina:** That ⁸ _____ will help both teams prepare without requiring concerns to disappear before they can be discussed.
- 17 **Jordan:** We also use ready differently. Sales means the supplier is willing, while quality means the required approval is complete.
- 18 **Lina:** Then build a ⁹ _____ around those statuses. A willing supplier and an approved transition are not the same thing.
- 19 **Jordan:** Our next step is to resolve the quality question and then decide the cutover through the proper authority.
- 20 **Lina:** I will record that in the ¹⁰ _____. We have aligned on the action, not agreed to proceed Tuesday regardless of readiness.

CHECK THE GAPS

1. constructive dissent / 2. local constraint / 3. working norm / 4. challenge protocol / 5. disagreement boundary / 6. repair statement / 7. explicit agreement / 8. pre-read / 9. shared vocabulary / 10. meeting closeout

[Why these answers fit, page 117](#)

F Check accuracy and scope

That timeline will not work is a request to test the plan

Return to the case

In the acquired US team, operations lead Jordan says the proposed Tuesday supplier cutover will not work because quality approval is still outstanding. Integration consultant Lina initially hears the direct objection as rejection of headquarters. Their previous organizations used different meeting habits. The actual issue is an uncompleted approval, not established hostility. They need explicit agreement and a clear boundary against personal attacks.

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

1. What should replace inferred consent?

- A. A national assumption about politeness
- B. A positive slide color with no decision
- C. A clear statement of agreement or remaining objection
- D. A guess based on who stayed quiet

2. Which closeout matches the facts?

- A. Record unanimous readiness despite the blocker
- B. Resolve quality approval before deciding the cutover
- C. Proceed Tuesday regardless of approval
- D. Cancel the acquisition because of one objection

[Answers and explanations, page 119](#)

Listen for the distinction

Switch roles and state the blocker, evidence, owner question, and next decision using the supplied facts.

Interpret the specific exchange, not a nationality

Some teams test a proposal aloud; others expect concerns to be resolved before a meeting. Ask what the speaker means and what evidence supports the objection. Directness does not excuse personal abuse.

F Say it / transfer to a new case

Silence was recorded as approval

A meeting ends without an explicit decision. Two participants remain silent. The required approval has not been given.

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

open / stated / approval / check

- 01 **Consultant:** Silence does not establish ¹ _____.
- 02 **Lead:** We need an explicit alignment ² _____.
- 03 **Consultant:** Any remaining objection should be ³ _____.
- 04 **Lead:** The decision remains ⁴ _____.

CHECK THE GAPS

1. approval / 2. check / 3. stated / 4. open

[Why these answers fit, page 119](#)

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 "That timeline will not work is a request to test the plan".
Jordan: "Some colleagues stayed silent after the first discussion. We should not assume that means they accepted the date." Lina: [missing response] Jordan: "A short note before the next meeting could identify the pending approval, its owner, and the evidence needed to resolve it." Which response belongs in the gap?

- A.** That pre-read will help both teams prepare without requiring concerns to disappear before they can be discussed.
- B.** Correct. We need explicit agreement on the next action and the eventual decision, using the actual approval process.
- C.** Then the local constraint needs to be visible. I initially heard the direct wording as a rejection of headquarters.
- D.** Our earlier working norm was to resolve most objections before the meeting, so the same wording landed differently for me.

[Answers and explanations, page 120](#)

A Read the situation

LESSON 04 / HANDLING HR DIFFERENCES WITHOUT INVENTING ASSURANCES

Explain a proposed HR change while preserving local review, current instructions, and employee trust.

A new title does not determine overtime status

The integration team proposes changing a US role title from operations coordinator to operations manager. A headquarters spreadsheet assumes the new title makes the role exempt from overtime. HR lead Denise has not completed the required review of actual duties, compensation, and applicable federal and state requirements. Consultant Ken must correct the assumption. No payroll-classification or benefits change has been approved, and the existing approved time-recording process remains in place.

People: Ken, Integration consultant; Denise, US HR lead.

Read the record

Choose one answer per question using the facts above.

1. What change is proposed?

- A.** An approved benefits reduction
- B.** A confirmed payroll reclassification
- C.** A role-title change
- D.** A completed legal exemption determination

2. Why is the spreadsheet assumption unsupported?

- A.** A job title alone does not determine exemption
- B.** Every manager title is automatically exempt
- C.** All salaried jobs are automatically exempt everywhere
- D.** Local requirements disappear after acquisition

3. What process currently remains in place?

- A.** Existing approved time recording
- B.** Automatic deletion of time records
- C.** An unapproved global payroll setting
- D.** No recording until review ends

[Answers and explanations, page 121](#)

B Vocabulary in use

CORE TERMS

job architecture

Framework organizing roles, levels, and titles.
align job architecture

job title

Label identifying a role without determining every legal status.
harmonize job titles

exempt classification

Status under specified legal pay requirements after the relevant assessment.
assess exempt classification

salary basis

Method of compensation relevant under certain legal tests.
review the salary basis

timekeeping

Recording work time under the applicable process.
maintain accurate timekeeping

local-law review

Qualified assessment of requirements in the relevant jurisdiction.
obtain local-law review

role mapping

Comparison of jobs across organizational structures.
complete role mapping

actual duties

Work genuinely performed in the role.
review actual duties

nonexempt classification

Status subject to the relevant applicable pay protections and requirements.
verify nonexempt classification

overtime eligibility

Entitlement under the actual applicable pay requirements.
assess overtime eligibility

policy harmonization

Coordinating policies while respecting relevant differences and requirements.
plan policy harmonization

benefits enrollment

Process of selecting or joining employee benefit arrangements.
coordinate benefits enrollment

Say it in context

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

job architecture **JOB ARCHITECTURE**

align job architecture

Keep the meaning precise: Framework organizing roles, levels, and titles.

nonexempt classification **NONEXEMPT CLASSIFICATION**

verify nonexempt classification

Keep the meaning precise: Status subject to the relevant applicable pay protections and requirements.

B Precision and professional shorthand

EXTEND YOUR RANGE

paid time off

Leave entitlement or policy under the actual applicable terms.

clarify paid-time-off arrangements

retention concern

Risk that employees may leave or disengage during transition.

address retention concerns

personnel data

Information relating to employees and their employment.

protect personnel data

clarification request

Question that resolves an unclear meaning or instruction.

make a targeted clarification request

working assumption

Provisional premise used while information is incomplete.

challenge a working assumption

action owner

Named person responsible for a specified next step.

confirm the action owner

employee communication

Message explaining relevant workplace information.

approve employee communications

consultation requirement

Obligation to seek input under the relevant law or process.

verify consultation requirements

approved change notice

Authorized communication of an actual workplace change.

issue an approved change notice

source attribution

Identification of where information came from.

preserve source attribution

scope boundary

Limit of the work or authority being discussed.

state the scope boundary

check-back

Restatement used to verify that a message was understood.

complete a check-back

Say it in context

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

benefits enrollment **BENEFITS ENROLLMENT**

coordinate benefits enrollment

Keep the meaning precise: Process of selecting or joining employee benefit arrangements.

personnel data **PERSONNEL DATA**

protect personnel data

Keep the meaning precise: Information relating to employees and their employment.

Phrases that move the work forward

Challenge the assumption

The title change does not establish overtime status.

Protect current instructions

Continue the existing approved time-recording process.

Avoid an unsupported promise

No change is approved at present; I cannot promise that nothing will ever change.

Limit data access

Share personnel information only through the authorized process.

Ken / in the conversation

The global role map changes operations coordinator to operations manager.

Denise / in the conversation

A job title does not determine the applicable overtime classification.

Denise / in the conversation

Then keep job architecture separate from payroll classification in both the spreadsheet and the employee explanation.

Denise / in the conversation

We need the actual duties, compensation information, and applicable requirements, assessed through the authorized HR and legal process.

Request the facts

We need the actual duties and compensation information for the review.

Separate workstreams

Title alignment and payroll classification are different decisions.

Route legal questions

The applicable requirements need qualified local review.

Close the loop

Employees should receive an approved notice when an actual decision is made.

Ken / in the conversation

The spreadsheet automatically labels the new title exempt.

Ken / in the conversation

The title mapping was intended to align levels across the group, not to complete a legal assessment of each US role.

Ken / in the conversation

What information does the proper review need before anyone changes the employee record or payroll setting?

Ken / in the conversation

Being paid a salary also should not be treated as a universal shortcut to an exemption conclusion.

Precision in real exchanges

Purpose: Separate workstreams

Useful wording: Title alignment and payroll classification are different decisions.

Purpose: Avoid an unsupported promise

Useful wording: No change is approved at present; I cannot promise that nothing will ever change.

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 correction should be made to the spreadsheet?

- A.** Every operations manager must be exempt
- B.** Salary alone settles every case
- C.** Acquisition automatically replaces local requirements
- D.** Title mapping does not establish exempt status

2. Which employee message is accurate?

- A.** Your benefits can never change
- B.** The new title removes every overtime entitlement
- C.** No classification change is approved; follow current time recording
- D.** Stop recording time immediately

3. A colleague needs the term for this meaning: Work genuinely performed in the role. Which term fits?

- A.** actual duties
- B.** working assumption
- C.** retention concern
- D.** timekeeping

D Choose the response that fits / continued

4. Rebuild the exchange from "A new title does not determine overtime status". Ken: "What information does the proper review need before anyone changes the employee record or payroll setting?" Denise: [missing response] Ken: "Being paid a salary also should not be treated as a universal shortcut to an exemption conclusion." Which response belongs in the gap?

- A.** Then keep job architecture separate from payroll classification in both the spreadsheet and the employee explanation.
- B.** Exactly. Local-law review is necessary before we make claims about what is required or permitted for these employees.
- C.** We need the actual duties, compensation information, and applicable requirements, assessed through the authorized HR and legal process.
- D.** Correct. The salary basis and other requirements must be reviewed in the actual context rather than assumed from one label.

[Answers and explanations, page 121](#)

One useful distinction

A manager title does not by itself establish exempt status. The actual requirements and role facts need qualified review; no classification change is authorized here.

E Conversation

A new title does not determine overtime status

A new title does not determine overtime status

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

WORD AND PHRASE BANK

salary basis / Local-law review / Policy harmonization / actual duties / personnel data /
timekeeping / job architecture / employee communication / exempt classification / job title

- 01 **Ken:** The global role map changes operations coordinator to operations manager. The spreadsheet automatically labels the new title exempt.
- 02 **Denise:** That assumption needs correction. A ¹ _____ does not determine the applicable overtime classification.
- 03 **Ken:** The title mapping was intended to align levels across the group, not to complete a legal assessment of each US role.
- 04 **Denise:** Then keep ² _____ separate from payroll classification in both the spreadsheet and the employee explanation.
- 05 **Ken:** What information does the proper review need before anyone changes the employee record or payroll setting?
- 06 **Denise:** We need the ³ _____, compensation information, and applicable requirements, assessed through the authorized HR and legal process.
- 07 **Ken:** Being paid a salary also should not be treated as a universal shortcut to an exemption conclusion.
- 08 **Denise:** Correct. The ⁴ _____ and other requirements must be reviewed in the actual context rather than assumed from one label.
- 09 **Ken:** I will remove the automatic conclusion and mark the classification field as awaiting the required review.
- 10 **Denise:** Good. No ⁵ _____ change has been approved here, and the title proposal should not be used as authorization to make one.

Conversation continues on the next page.

A new title does not determine overtime status

CONVERSATION / CONTINUED

- 11 **Ken:** Employees have asked whether they should stop using the current time-recording process once the new organization chart appears.
- 12 **Denise:** Tell them to continue the approved ⁶ _____ process. A proposed chart does not cancel current instructions.
- 13 **Ken:** We also have different leave and benefits arrangements across the two organizations. The global template does not resolve those differences.
- 14 **Denise:** ⁷ _____ needs its own review, including relevant local requirements and any consultation or approval obligations.
- 15 **Ken:** The local-law questions should go to the qualified advisers rather than be answered from a general headquarters presentation.
- 16 **Denise:** Exactly. ⁸ _____ is necessary before we make claims about what is required or permitted for these employees.
- 17 **Ken:** Some employees want reassurance that nothing about their work or benefits will ever change. I do not have authority to promise that.
- 18 **Denise:** Give an accurate ⁹ _____: no change is approved at present, and actual decisions will be communicated through the authorized process.
- 19 **Ken:** I will also make sure the role records and compensation details are shared only with the people authorized for the review.
- 20 **Denise:** Protect the ¹⁰ _____. The integration need does not justify sending sensitive employee information to every person on the program mailing list.

CHECK THE GAPS

1. job title / 2. job architecture / 3. actual duties / 4. salary basis / 5. exempt classification / 6. timekeeping / 7. Policy harmonization / 8. Local-law review / 9. employee communication / 10. personnel data

[Why these answers fit, page 122](#)

F Check accuracy and scope

A new title does not determine overtime status

Return to the case

The integration team proposes changing a US role title from operations coordinator to operations manager. A headquarters spreadsheet assumes the new title makes the role exempt from overtime. HR lead Denise has not completed the required review of actual duties, compensation, and applicable federal and state requirements. Consultant Ken must correct the assumption. No payroll-classification or benefits change has been approved, and the existing approved time-recording process remains in place.

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

1. What should HR examine?

- A. Actual role facts and applicable requirements
- B. Only the preferred global title
- C. Only whether the spreadsheet cell is green
- D. A rule from an unrelated country without review

2. How should personnel records be shared?

- A. As proof that ownership cancels privacy duties
- B. Through the authorized access and privacy process
- C. With everyone on the integration mailing list
- D. In an unrestricted public folder

[Answers and explanations, page 124](#)

Listen for the distinction

Switch roles and give the current employee message without promising permanent unchanged terms.

Consistent principles do not require identical local rules

Global titles and templates can aid coordination, but local employment requirements and actual role duties still matter. Give employees verified information instead of broad promises about future changes.

F Say it / transfer to a new case

The organization chart was mistaken for a payroll instruction

A proposed organization chart uses new titles. No payroll classification change is approved, and current timekeeping instructions remain effective.

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

process / incomplete / authorization / title

- 01 **Employee:** The chart shows a proposed ¹ _____.
- 02 **HR:** The classification review remains ² _____.
- 03 **Employee:** I should continue the approved timekeeping ³ _____.
- 04 **HR:** An actual change needs the required ⁴ _____.

CHECK THE GAPS

1. title / 2. incomplete / 3. process / 4. authorization

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

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 new title does not determine overtime status". Ken: "We also have different leave and benefits arrangements across the two organizations. The global template does not resolve those differences." Denise: [missing response] Ken: "The local-law questions should go to the qualified advisers rather than be answered from a general headquarters presentation." Which response belongs in the gap?

- A.** Tell them to continue the approved timekeeping process. A proposed chart does not cancel current instructions.
- B.** Policy harmonization needs its own review, including relevant local requirements and any consultation or approval obligations.
- C.** Then keep job architecture separate from payroll classification in both the spreadsheet and the employee explanation.
- D.** That assumption needs correction. A job title does not determine the applicable overtime classification.

[Answers and explanations, page 125](#)

Review 2 / Meaning and context

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

Case file

Revisit "Turning blunt disagreement into a workable decision" and "Handling HR differences without inventing assurances". 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: Reasoned disagreement intended to improve a decision. Which term fits?

- A. constructive dissent
- B. source attribution
- C. decision norm
- D. pre-read

2. A colleague needs the term for this meaning: Entitlement under the actual applicable pay requirements. Which term fits?

- A. clarification request
- B. overtime eligibility
- C. job architecture
- D. paid time off

3. Rebuild the exchange from "Sponsor support is not process-change authorization". Priya: "What can you decide as the integration consultant, and what needs to stay with the functional and steering roles?" Leo: [missing response] Priya: "We need a clear request with the proposed scope, affected customers, risks, and the question the committee must answer." Which response belongs in the gap?

- A. Good. That reduces confusion about delegated authority while keeping the proposal moving through the people who can properly decide it.
- B. I can coordinate the change request, assemble the dependencies, and track the decision. I cannot approve this process change myself.
- C. That is the required consulted stakeholder role here. Consultation is not optional simply because the desired outcome is familiar.
- D. We need to distinguish support from decision rights. The agreed matrix still requires finance ownership, local legal input, and steering approval.

Review 2 / Meaning and context / continued

4. Rebuild the exchange from "A new title does not determine overtime status". Ken: "Some employees want reassurance that nothing about their work or benefits will ever change. I do not have authority to promise that." Denise: [missing response] Ken: "I will also make sure the role records and compensation details are shared only with the people authorized for the review." Which response belongs in the gap?

- A.** Give an accurate employee communication: no change is approved at present, and actual decisions will be communicated through the authorized process.
- B.** Good. No exempt classification change has been approved here, and the title proposal should not be used as authorization to make one.
- C.** Correct. The salary basis and other requirements must be reviewed in the actual context rather than assumed from one label.
- D.** Protect the personnel data. The integration need does not justify sending sensitive employee information to every person on the program mailing list.

[Answers and explanations, page 149](#)

A Read the situation

LESSON 05 / RUNNING A CROSS-FUNCTIONAL IT CUTOVER CONVERSATION

Explain a hidden system dependency and distinguish technical readiness from a go-live decision.

Successful login does not prove invoice posting works

The integration team has tested employee login to the new identity platform successfully. A scheduled invoice-posting job still uses a legacy service account and has not passed an end-to-end test on the new setup. IT lead Fatima and integration consultant Eric review the planned retirement of the legacy identity service. No go-live approval is supplied, and broad shared-administrator access is not an approved workaround.

People: Eric, Integration consultant; Fatima, IT integration lead.

Read the record

Choose one answer per question using the facts above.

1. Which test has passed?

- A. Employee login to the new identity platform
- B. End-to-end invoice posting on the new setup
- C. Complete retirement of every legacy account
- D. Approval of shared-administrator access

2. What dependency remains?

- A. The new platform is already retired
- B. The invoice job uses a legacy service account
- C. Every user lacks a new login
- D. The acquired business has no invoices

3. Which action is not approved?

- A. Broad shared-administrator access as a workaround
- B. Explaining the dependency
- C. Performing authorized readiness review
- D. Identifying business impact

[Answers and explanations, page 126](#)

B Vocabulary in use

CORE TERMS

cutover

Controlled transition from one operating setup to another.

plan the cutover

identity provider

Service managing authentication identity under the actual architecture.

verify identity-provider dependencies

service account

Identity used by an application or automated process.

review service-account access

least privilege

Limiting access to what is needed for the authorized task.

maintain least privilege

end-to-end test

Test covering the relevant full process across connected components.

run an end-to-end test

cutover window

Planned period for the controlled transition.

confirm the cutover window

system migration

Transfer of applications, data, or operations to a different setup.

sequence the system migration

single sign-on

Authentication arrangement allowing access across approved services.

test single sign-on

access entitlement

Permission assigned to a user or system identity.

validate access entitlements

user acceptance testing

Business-user verification against agreed acceptance requirements.

complete user acceptance testing

reconciliation

Comparison confirming agreement between relevant records or outputs.

perform transaction reconciliation

rollback plan

Approved method for returning to a prior workable state if needed.

validate the rollback plan

Say it in context

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

cutover CUTOVER

plan the cutover

Keep the meaning precise: Controlled transition from one operating setup to another.

access entitlement ACCESS ENTITLEMENT

validate access entitlements

Keep the meaning precise: Permission assigned to a user or system identity.

B Precision and professional shorthand

EXTEND YOUR RANGE

go/no-go decision

Explicit authorization to proceed or not proceed at a defined point.

make the go/no-go decision

legacy dependency

Reliance on a component of the earlier setup.

identify the legacy dependency

data integrity

Accuracy and consistency of data under the relevant process.

protect data integrity

clarification request

Question that resolves an unclear meaning or instruction.

make a targeted clarification request

working assumption

Provisional premise used while information is incomplete.

challenge a working assumption

action owner

Named person responsible for a specified next step.

confirm the action owner

change freeze

Defined restriction on changes during a sensitive period.

observe the change freeze

interface mapping

Definition of how information moves between connected systems.

verify interface mapping

segregation of duties

Separation of incompatible responsibilities under the control framework.

preserve segregation of duties

source attribution

Identification of where information came from.

preserve source attribution

scope boundary

Limit of the work or authority being discussed.

state the scope boundary

check-back

Restatement used to verify that a message was understood.

complete a check-back

Say it in context

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

rollback plan ROLLBACK PLAN

validate the rollback plan

Keep the meaning precise: Approved method for returning to a prior workable state if needed.

data integrity DATA INTEGRITY

protect data integrity

Keep the meaning precise: Accuracy and consistency of data under the relevant process.

Phrases that move the work forward

Translate the risk

Employees can sign in, but invoice posting still depends on the old service.

Name the dependency

The scheduled job still uses a legacy service account.

Define acceptance

Which business outputs must reconcile before signoff?

Separate date and permission

A scheduled window is not go-live authorization.

Eric / in the conversation

Employee login passed on the new platform.

Fatima / in the conversation

That single sign-on test covers employee access, not every automated job using the existing environment.

Fatima / in the conversation

It still uses a legacy service account, and that dependency has not been resolved in the new setup.

Fatima / in the conversation

That is the legacy dependency the sponsor needs to understand in operational terms.

Limit the status

Login testing passed; end-to-end business testing has not.

Preserve controls

We need an authorized fix, not broad shared-administrator access.

Clarify fallback

Who owns the approved rollback decision and process?

Close the decision

Report the unresolved dependency before the go/no-go review.

Eric / in the conversation

Can we tell the sponsor that the old identity service is ready to retire?

Eric / in the conversation

The finance workstream mentioned that invoice posting runs on a schedule rather than through a person signing in.

Eric / in the conversation

If we retire the old identity service before addressing it, the business impact could be failed invoice posting.

Eric / in the conversation

We need to test the actual invoice process from its start through the expected output, not just repeat the login test.

Precision in real exchanges

Purpose: Preserve controls

Useful wording: We need an authorized fix, not broad shared-administrator access.

Purpose: Define acceptance

Useful wording: Which business outputs must reconcile before signoff?

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 sponsor update is accurate?

- A.** Shared administrator access has been approved
- B.** Login passed; invoice posting remains dependent on the legacy account
- C.** All systems are integrated
- D.** The scheduled window proves readiness

2. What should an acceptance check include here?

- A.** Only whether the new logo appears
- B.** Only an employee's successful password entry
- C.** A green slide with no transaction evidence
- D.** The invoice job's end-to-end result and reconciliation

3. A colleague needs the term for this meaning: Authentication arrangement allowing access across approved services. Which term fits?

- A.** working assumption
- B.** single sign-on
- C.** legacy dependency
- D.** end-to-end test

D Choose the response that fits / continued

4. Rebuild the exchange from "Successful login does not prove invoice posting works". Eric: "If we retire the old identity service before addressing it, the business impact could be failed invoice posting." Fatima: [missing response] Eric: "We need to test the actual invoice process from its start through the expected output, not just repeat the login test." Which response belongs in the gap?

- A.** Yes. The end-to-end test must use the agreed requirements and authorized test arrangements.
- B.** Good. User acceptance testing should reflect the business outcome, not just a successful technical component.
- C.** Not yet. That single sign-on test covers employee access, not every automated job using the existing environment.
- D.** That is the legacy dependency the sponsor needs to understand in operational terms.

[Answers and explanations, page 126](#)

One useful distinction

A passed employee-login test does not establish that the invoice job works. The legacy service-account dependency must be resolved and tested within the authorized plan.

E Conversation

Successful login does not prove invoice posting works

Successful login does not prove invoice posting works

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

WORD AND PHRASE BANK

single sign-on / reconciliation / User acceptance testing / legacy dependency /
end-to-end test / service account / least privilege / go/no-go decision / data integrity /
rollback plan

- 01 **Eric:** Employee login passed on the new platform. Can we tell the sponsor that the old identity service is ready to retire?
- 02 **Fatima:** Not yet. That ¹ _____ test covers employee access, not every automated job using the existing environment.
- 03 **Eric:** The finance workstream mentioned that invoice posting runs on a schedule rather than through a person signing in.
- 04 **Fatima:** Correct. It still uses a legacy ² _____, and that dependency has not been resolved in the new setup.
- 05 **Eric:** If we retire the old identity service before addressing it, the business impact could be failed invoice posting.
- 06 **Fatima:** That is the ³ _____ the sponsor needs to understand in operational terms.
- 07 **Eric:** We need to test the actual invoice process from its start through the expected output, not just repeat the login test.
- 08 **Fatima:** Yes. The ⁴ _____ must use the agreed requirements and authorized test arrangements.
- 09 **Eric:** Finance also needs to verify that the resulting records match the expected transactions and totals.
- 10 **Fatima:** Include that ⁵ _____ in the acceptance evidence. A job reporting success does not by itself prove that every output is correct.

Conversation continues on the next page.

Successful login does not prove invoice posting works

CONVERSATION / CONTINUED

- 11 **Eric:** Someone suggested sharing a broad administrator account until the integration team has more time to solve the issue.
- 12 **Fatima:** That is not approved. Maintain ⁶ _____ and use the actual access-review process for an appropriate solution.
- 13 **Eric:** The cutover window is already in the calendar, but the remaining tests and approvals have not been completed.
- 14 **Fatima:** Then the ⁷ _____ remains separate from the scheduled window. We must report the unresolved facts before that review.
- 15 **Eric:** We should also know what happens if the approved transition starts and the business checks fail.
- 16 **Fatima:** The ⁸ _____ needs its actual owner, conditions, and verified feasibility rather than a vague promise to undo everything.
- 17 **Eric:** I will align the IT and finance updates so one does not say complete while the other still reports an untested process.
- 18 **Fatima:** Good. ⁹ _____ should reflect the business outcome, not just a successful technical component.
- 19 **Eric:** The sponsor update will state that login passed, invoice posting remains dependent on the old service, and the decision is pending.
- 20 **Fatima:** That makes ¹⁰ _____ and continuity visible without bypassing controls, inventing approval, or treating the new platform's appearance as evidence that the migration is complete.

CHECK THE GAPS

1. single sign-on / 2. service account / 3. legacy dependency / 4. end-to-end test / 5. reconciliation / 6. least privilege / 7. go/no-go decision / 8. rollback plan / 9. User acceptance testing / 10. data integrity

[Why these answers fit, page 127](#)

F Check accuracy and scope

Successful login does not prove invoice posting works

Return to the case

The integration team has tested employee login to the new identity platform successfully. A scheduled invoice-posting job still uses a legacy service account and has not passed an end-to-end test on the new setup. IT lead Fatima and integration consultant Eric review the planned retirement of the legacy identity service. No go-live approval is supplied, and broad shared-administrator access is not an approved workaround.

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

1. Which response preserves control?

- A. Remove every approval because the schedule is tight
- B. Hide the dependency until after retirement
- C. Resolve access through the authorized least-privilege process
- D. Share one unrestricted administrator account

2. What is the status of the go-live decision?

- A. Delegated to every employee
- B. Not supplied as approved
- C. Automatically approved by the calendar
- D. Completed by the login test alone

[Answers and explanations, page 129](#)

Listen for the distinction

Switch roles and state the unresolved test, control requirement, and go/no-go status.

Translate the dependency into business impact

A nontechnical sponsor needs to understand which business process could fail, not merely hear that an interface remains amber. Preserve the security controls while explaining the decision.

F Say it / transfer to a new case

A successful job produced mismatched totals

A test job reports success, but finance finds that its output total does not match the expected test transactions. No acceptance signoff has been given.

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

success / confirmed / reconcile / decision

- 01 **IT:** The job reported ¹ _____.
- 02 **Finance:** The totals do not ² _____.
- 03 **IT:** Business acceptance is not yet ³ _____.
- 04 **Finance:** Record the discrepancy before the go/no-go ⁴ _____.

CHECK THE GAPS

1. success / 2. reconcile / 3. confirmed / 4. decision

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

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 "Successful login does not prove invoice posting works".
Eric: "The cutover window is already in the calendar, but the remaining tests and approvals have not been completed." **Fatima:** [missing response] **Eric:** "We should also know what happens if the approved transition starts and the business checks fail."
Which response belongs in the gap?

- A.** Correct. It still uses a legacy service account, and that dependency has not been resolved in the new setup.
- B.** The rollback plan needs its actual owner, conditions, and verified feasibility rather than a vague promise to undo everything.
- C.** Not yet. That single sign-on test covers employee access, not every automated job using the existing environment.
- D.** Then the go/no-go decision remains separate from the scheduled window. We must report the unresolved facts before that review.

[Answers and explanations, page 130](#)

A Read the situation

LESSON 06 / KEEPING CUSTOMER COMMUNICATIONS AND PAYMENT CHANGES CONTROLLED

Explain continuity to a customer while separating branding, contracting identity, and verified payment instructions.

New ownership does not rewrite every invoice instruction

After the acquisition, customer contact Morgan receives a new logo announcement and a separate email asking for payment to a new bank account. Under the supplied approved transition plan, the existing US subsidiary remains the invoicing entity and payment instructions have not been changed. Account lead Sofia and integration consultant Daniel must verify the unexpected email through established channels and avoid sending unapproved new instructions.

People: Sofia, Account lead; Daniel, Integration consultant.

Read the record

Choose one answer per question using the facts above.

1. Which entity remains the invoicing entity under the supplied plan?

- A.** The integration consultant
- B.** The existing US subsidiary
- C.** The overseas parent automatically
- D.** A new unnamed company

2. What is the approved payment-instruction status?

- A.** The new email is automatically valid
- B.** Every invoice must use a new account
- C.** The customer must choose between accounts
- D.** No change has been approved

3. How should the unexpected email be treated?

- A.** As proof that acquisition requires new bank details
- B.** As harmless because it contains the logo
- C.** As a completed authorized change
- D.** As an unverified request needing established-channel verification

[Answers and explanations, page 131](#)

B Vocabulary in use

CORE TERMS

customer continuity

Maintenance of customer service and obligations during transition.

protect customer continuity

invoicing entity

Entity issuing the invoice under the actual arrangement.

confirm the invoicing entity

contract assignment

Transfer of contractual rights under the applicable terms and law.

review contract-assignment requirements

customer consent

Customer agreement where required for a specified change.

verify customer-consent requirements

vendor master

Customer or company record containing supplier details.

control vendor-master changes

business email compromise

Fraud involving deceptive business communications or compromised accounts.

recognize business-email-compromise risk

contracting entity

Legal person entering the relevant customer agreement.

identify the contracting entity

brand transition

Change in external name or visual presentation.

coordinate the brand transition

novation

Substitution of a contractual party or obligation under the applicable agreement and law.

obtain novation advice

remittance instruction

Direction for making a payment.

verify remittance instructions

independent verification

Check using a trusted source separate from the unverified request.

perform independent verification

callback control

Verification through an independently established contact route.

use the callback control

Say it in context

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

customer continuity CUSTOMER CONTINUITY

protect customer continuity

Keep the meaning precise: Maintenance of customer service and obligations during transition.

novation NOVATION

obtain novation advice

Keep the meaning precise: Substitution of a contractual party or obligation under the applicable agreement and law.

B Precision and professional shorthand

EXTEND YOUR RANGE

service-level commitment

Stated obligation concerning the level of service.
preserve service-level commitments

customer-facing notice

Communication intended for customers.
approve customer-facing notices

commercial continuity plan

Approved arrangement for maintaining customer-facing operations.
follow the commercial continuity plan

clarification request

Question that resolves an unclear meaning or instruction.
make a targeted clarification request

working assumption

Provisional premise used while information is incomplete.
challenge a working assumption

action owner

Named person responsible for a specified next step.
confirm the action owner

account handoff

Transfer of customer relationship responsibilities.
coordinate the account handoff

authorized signatory

Person with the relevant power to sign or authorize an action.
verify the authorized signatory

payment redirection

Change to the destination or process for a payment.
investigate payment redirection

source attribution

Identification of where information came from.
preserve source attribution

scope boundary

Limit of the work or authority being discussed.
state the scope boundary

check-back

Restatement used to verify that a message was understood.
complete a check-back

Say it in context

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

callback control **CALLBACK CONTROL**

use the callback control

Keep the meaning precise: Verification through an independently established contact route.

commercial continuity plan **COMMERCIAL CONTINUITY PLAN**

follow the commercial continuity plan

Keep the meaning precise: Approved arrangement for maintaining customer-facing operations.

Phrases that move the work forward

Separate identity and branding

The logo changed; the approved invoicing entity has not.

Challenge the request

That account-change email has not been verified.

Avoid email-loop verification

Do not rely only on the phone number inside the unverified message.

Keep notices consistent

Customer-facing messages need the approved facts and review.

Sofia / in the conversation

A customer received our new logo announcement and then an email asking them to pay a different bank account.

Daniel / in the conversation

Separate the brand transition from the payment request.

Sofia / in the conversation

The customer also asks whether the overseas parent now replaces the US subsidiary on every invoice.

Daniel / in the conversation

We should not infer a substitution from the acquisition announcement.

State continuity

Continue using the existing approved payment instructions.

Use a trusted route

Confirm through contact details already independently established.

Clarify contract status

Ownership change alone does not answer the contract-transfer question.

Close the handoff

Confirm the account owner, support route, and any actually authorized changes.

Sofia / in the conversation

They assume both are part of integration.

Daniel / in the conversation

The approved plan has not changed the remittance instructions.

Daniel / in the conversation

Under the approved plan, the invoicing entity remains the existing US subsidiary.

Sofia / in the conversation

Their contract names that subsidiary too, but any actual transfer question needs the appropriate legal review.

Precision in real exchanges

Purpose: Use a trusted route

Useful wording: Confirm through contact details already independently established.

Purpose: Avoid email-loop verification

Useful wording: Do not rely only on the phone number inside the unverified message.

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 customer statement matches the approved plan?

- A.** The existing US entity and payment instructions remain in use
- B.** The parent automatically replaces every contract party
- C.** The new logo validates the new bank account
- D.** The customer should pay whichever email arrived latest

2. Which verification route is appropriate?

- A.** The appearance of the company logo
- B.** Independently established trusted contact details
- C.** Only the number in the unexpected email
- D.** A reply asking the same sender to confirm itself

3. A colleague needs the term for this meaning: Change in external name or visual presentation. Which term fits?

- A.** working assumption
- B.** brand transition
- C.** customer-facing notice
- D.** vendor master

D Choose the response that fits / continued

4. Rebuild the exchange from "New ownership does not rewrite every invoice instruction". Sofia: "Their contract names that subsidiary too, but any actual transfer question needs the appropriate legal review." Daniel: [missing response] Sofia: "For the bank-account email, we should verify through the contact route already established in the relationship." Which response belongs in the gap?

- A.** Separate the brand transition from the payment request. The approved plan has not changed the remittance instructions.
- B.** That is why business email compromise is relevant during a transition. A plausible integration story should not bypass the controls.
- C.** Correct. The contracting entity and its obligations should be described from the actual records, not a simplified group label.
- D.** Also align the customer-facing notice so customers do not receive conflicting instructions from sales, finance, and the integration team.

[Answers and explanations, page 131](#)

One useful distinction

The supplied plan retains the US invoicing entity and existing payment instructions. A new logo and an unexpected email do not authorize a bank-account change.

E Conversation

New ownership does not rewrite every invoice instruction

New ownership does not rewrite every invoice instruction

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

WORD AND PHRASE BANK

contracting entity / commercial continuity plan / independent verification / vendor master
/ customer-facing notice / customer continuity / Payment redirection / invoicing entity /
business email compromise / brand transition

- 01 **Sofia:** A customer received our new logo announcement and then an email asking them to pay a different bank account. They assume both are part of integration.
- 02 **Daniel:** Separate the ¹ _____ from the payment request. The approved plan has not changed the remittance instructions.
- 03 **Sofia:** The customer also asks whether the overseas parent now replaces the US subsidiary on every invoice.
- 04 **Daniel:** Under the approved plan, the ² _____ remains the existing US subsidiary. We should not infer a substitution from the acquisition announcement.
- 05 **Sofia:** Their contract names that subsidiary too, but any actual transfer question needs the appropriate legal review.
- 06 **Daniel:** Correct. The ³ _____ and its obligations should be described from the actual records, not a simplified group label.
- 07 **Sofia:** For the bank-account email, we should verify through the contact route already established in the relationship.
- 08 **Daniel:** Yes. Use ⁴ _____ rather than relying on a new phone number printed in that same email.
- 09 **Sofia:** I will not send a replacement account number or ask the customer to choose between the two sets of instructions.
- 10 **Daniel:** Good. ⁵ _____ needs the actual controlled process and verified authorization.

Conversation continues on the next page.

New ownership does not rewrite every invoice instruction

CONVERSATION / CONTINUED

- 11 **Sofia:** The logo and correct account-manager name make the email look convincing, but those details do not establish that it is genuine.
- 12 **Daniel:** That is why ⁶ _____ is relevant during a transition. A plausible integration story should not bypass the controls.
- 13 **Sofia:** The customer may also need to update its supplier record, but we should give only approved entity information.
- 14 **Daniel:** Exactly. Any ⁷ _____ change should follow the customer's and our actual verification requirements.
- 15 **Sofia:** Our immediate response can explain that the existing approved payment instructions remain in place while the unexpected request is checked.
- 16 **Daniel:** That protects ⁸ _____ without pretending that every integration question is already resolved.
- 17 **Sofia:** I will coordinate the account response with finance and the authorized security or fraud-reporting contact, preserving the message as required.
- 18 **Daniel:** Also align the ⁹ _____ so customers do not receive conflicting instructions from sales, finance, and the integration team.
- 19 **Sofia:** The account owner and support route remain clear, and any future approved change will use the actual notice and verification process.
- 20 **Daniel:** Record that in the ¹⁰ _____. New ownership is not a reason to improvise a contract transfer or a bank-account change.

CHECK THE GAPS

1. brand transition / 2. invoicing entity / 3. contracting entity / 4. independent verification / 5. Payment redirection / 6. business email compromise / 7. vendor master / 8. customer continuity / 9. customer-facing notice / 10. commercial continuity plan

[Why these answers fit, page 132](#)

F Check accuracy and scope

New ownership does not rewrite every invoice instruction

Return to the case

After the acquisition, customer contact Morgan receives a new logo announcement and a separate email asking for payment to a new bank account. Under the supplied approved transition plan, the existing US subsidiary remains the invoicing entity and payment instructions have not been changed. Account lead Sofia and integration consultant Daniel must verify the unexpected email through established channels and avoid sending unapproved new instructions.

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

1. What must be reviewed separately from branding?

- A. Actual contract and invoicing-entity changes
- B. Whether the logo file opens
- C. The color of a presentation title
- D. The alphabetical order of contacts

2. What should the team avoid?

- A. Explaining the current approved plan
- B. Coordinating with the authorized account owner
- C. Sending unapproved replacement payment instructions
- D. Preserving the unexpected message through the reporting process

[Answers and explanations, page 134](#)

Listen for the distinction

Switch roles and give the customer the current approved status without supplying new payment details.

Reassurance needs specific facts

Customers want to know whom they are dealing with, where to obtain support, and whether anything changes in the current process. A general welcome message should not imply unapproved contractual or payment changes.

F Say it / transfer to a new case

A reply was treated as independent verification

A team replies to an unexpected bank-account-change email, and the same sender says it is genuine. No independently verified contact has confirmed the request.

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

sender / contact / unverified / verification

- 01 **Lead:** The reply came from the same ¹ _____.
- 02 **Consultant:** That is not independent ² _____.
- 03 **Lead:** We need an established trusted ³ _____.
- 04 **Consultant:** The payment change remains ⁴ _____.

CHECK THE GAPS

1. sender / 2. verification / 3. contact / 4. unverified

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

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 "New ownership does not rewrite every invoice instruction". Sofia: "The customer may also need to update its supplier record, but we should give only approved entity information." Daniel: [missing response] Sofia: "Our immediate response can explain that the existing approved payment instructions remain in place while the unexpected request is checked." Which response belongs in the gap?

- A.** Exactly. Any vendor master change should follow the customer's and our actual verification requirements.
- B.** Separate the brand transition from the payment request. The approved plan has not changed the remittance instructions.
- C.** That protects customer continuity without pretending that every integration question is already resolved.
- D.** Yes. Use independent verification rather than relying on a new phone number printed in that same email.

[Answers and explanations, page 135](#)

Review 3 / Meaning and context

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

Case file

Revisit "Running a cross-functional IT cutover conversation" and "Keeping customer communications and payment changes controlled". 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: Service managing authentication identity under the actual architecture. Which term fits?

- A. change freeze
- B. identity provider
- C. source attribution
- D. user acceptance testing

2. A colleague needs the term for this meaning: Direction for making a payment. Which term fits?

- A. customer continuity
- B. remittance instruction
- C. clarification request
- D. service-level commitment

3. Rebuild the exchange from "A new title does not determine overtime status". Ken: "I will remove the automatic conclusion and mark the classification field as awaiting the required review." Denise: [missing response] Ken: "Employees have asked whether they should stop using the current time-recording process once the new organization chart appears." Which response belongs in the gap?

- A. Good. No exempt classification change has been approved here, and the title proposal should not be used as authorization to make one.
- B. Give an accurate employee communication: no change is approved at present, and actual decisions will be communicated through the authorized process.
- C. Protect the personnel data. The integration need does not justify sending sensitive employee information to every person on the program mailing list.
- D. Correct. The salary basis and other requirements must be reviewed in the actual context rather than assumed from one label.

Review 3 / Meaning and context / continued

4. Rebuild the exchange from "New ownership does not rewrite every invoice instruction". Sofia: "I will coordinate the account response with finance and the authorized security or fraud-reporting contact, preserving the message as required." Daniel: [missing response] Sofia: "The account owner and support route remain clear, and any future approved change will use the actual notice and verification process." Which response belongs in the gap?

- A.** That is why business email compromise is relevant during a transition. A plausible integration story should not bypass the controls.
- B.** Also align the customer-facing notice so customers do not receive conflicting instructions from sales, finance, and the integration team.
- C.** Separate the brand transition from the payment request. The approved plan has not changed the remittance instructions.
- D.** Correct. The contracting entity and its obligations should be described from the actual records, not a simplified group label.

[Answers and explanations, page 151](#)

A Read the situation

LESSON 07 / REPORTING INTEGRATION SYNERGIES WITHOUT DOUBLE COUNTING

Reconcile annualized savings, realized results, and integration costs on a defined reporting basis.

Annual run rate is not money already realized

A fictional procurement change saves USD 50,000 per month for three completed months against the agreed baseline. Gross realized savings are USD 150,000. A one-time integration cost of USD 90,000 belongs to the same reporting period and defined cash basis, giving USD 60,000 net realized benefit. Annualizing the monthly saving gives a USD 600,000 run rate, not a realized full-year result. IT and procurement both list the same saving in their workstream reports.

People: Nina, Integration finance lead; Oscar, Procurement lead.

Read the record

Choose one answer per question using the facts above.

1. What is the gross realized saving for the three months?

- A. USD 60,000
- B. USD 90,000
- C. USD 150,000
- D. USD 600,000

2. What is the net realized benefit on the supplied basis?

- A. USD 510,000
- B. USD 60,000
- C. USD 150,000
- D. USD 600,000

3. Why must the two workstream reports be reconciled?

- A. Monthly and annual units are always identical
- B. They list the same saving
- C. Each has a different verified benefit
- D. The saving has no owner

[Answers and explanations, page 136](#)

B Vocabulary in use

CORE TERMS

synergy

Benefit attributed to combining businesses under a defined analysis.

substantiate the synergy

gross saving

Benefit before the specified related costs.

report the gross saving

run-rate saving

Annualized or other normalized saving based on a stated current rate.

distinguish run-rate savings

one-time integration cost

Nonrecurring transition cost under the stated classification.

track one-time integration costs

realization date

Date from which a benefit is treated as achieved under the methodology.

verify the realization date

cost avoidance

Prevention of a prospective cost rather than necessarily reducing an existing expense.

distinguish cost avoidance

baseline

Agreed reference against which a change is measured.

establish the savings baseline

net benefit

Benefit after the specified costs on the defined basis.

reconcile the net benefit

in-period realization

Benefit actually achieved within the stated reporting period.

verify in-period realization

benefit owner

Person accountable for delivering and substantiating a benefit.

name the benefit owner

benefit register

Record of benefits, owners, assumptions, and status.

update the benefit register

headcount saving

Defined labor-cost reduction subject to actual staffing and cost effects.

validate headcount savings

Say it in context

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

synergy SYNERGY

substantiate the synergy

Keep the meaning precise: Benefit attributed to combining businesses under a defined analysis.

in-period realization IN-PERIOD REALIZATION

verify in-period realization

Keep the meaning precise: Benefit actually achieved within the stated reporting period.

B Precision and professional shorthand

EXTEND YOUR RANGE

procurement saving

Reduction attributed to purchasing changes on a specified basis.

verify procurement savings

dis-synergy

Adverse cost or revenue effect associated with integration.

identify dis-synergies

finance validation

Review of figures and methodology by the designated finance role.

obtain finance validation

clarification request

Question that resolves an unclear meaning or instruction.

make a targeted clarification request

working assumption

Provisional premise used while information is incomplete.

challenge a working assumption

action owner

Named person responsible for a specified next step.

confirm the action owner

revenue synergy

Additional revenue attributed to integration under a defined analysis.

assess revenue synergies

double counting

Recording the same underlying benefit more than once.

prevent double counting

benefit bridge

Reconciliation from baseline and gross effects to the reported benefit.

prepare the benefit bridge

source attribution

Identification of where information came from.

preserve source attribution

scope boundary

Limit of the work or authority being discussed.

state the scope boundary

check-back

Restatement used to verify that a message was understood.

complete a check-back

Say it in context

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

headcount saving HEADCOUNT SAVING

validate headcount savings

Keep the meaning precise: Defined labor-cost reduction subject to actual staffing and cost effects.

finance validation FINANCE VALIDATION

obtain finance validation

Keep the meaning precise: Review of figures and methodology by the designated finance role.

Phrases that move the work forward

Label the measure

Six hundred thousand is the annualized run rate.

Include the cost

The same-period integration cost reduces net realized benefit to sixty thousand.

Check the baseline

Which agreed reference supports this calculation?

Name accountability

One benefit owner should coordinate the supporting evidence.

Oscar / in the conversation

The procurement change saves fifty thousand dollars a month, so I reported six hundred thousand as realized integration savings.

Nina / in the conversation

We have three months of actual savings in the record we have.

Nina / in the conversation

That is the in-period realization before the related cost included in this reporting basis.

Nina / in the conversation

Then include the one-time integration cost rather than letting the headline imply the change was free to deliver.

State realization

The completed three-month gross saving is one hundred fifty thousand.

Prevent duplication

IT and procurement contributed to one saving, not two separate benefits.

Separate future and past

The run rate assumes the monthly level continues.

Report the bridge

Show baseline, gross realization, included costs, and net result together.

Nina / in the conversation

That is the annualized run-rate saving, not the completed-period result.

Oscar / in the conversation

Three times fifty thousand gives one hundred fifty thousand of gross savings for those completed months.

Oscar / in the conversation

The one-time implementation expense was ninety thousand in the same period, and the report uses the stated cash basis.

Oscar / in the conversation

The net realized benefit is therefore sixty thousand, even though the monthly saving could continue beyond this quarter.

Precision in real exchanges

Purpose: Prevent duplication

Useful wording: IT and procurement contributed to one saving, not two separate benefits.

Purpose: Check the baseline

Useful wording: Which agreed reference supports this calculation?

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 headline is accurate?

- A.** 600,000 already realized in three months
- B.** 150,000 net after the 90,000 cost
- C.** 1.2 million because two workstreams reported the saving
- D.** 600,000 annualized run rate; 60,000 net realized in the stated period

2. What is the double-counting correction?

- A.** Add both reports because both teams worked on it
- B.** Remove the cost so the numbers match
- C.** Call the same saving a second revenue synergy
- D.** Record the underlying benefit once while acknowledging both teams

3. A colleague needs the term for this meaning: Benefit after the specified costs on the defined basis. Which term fits?

- A.** dis-synergy
- B.** realization date
- C.** working assumption
- D.** net benefit

D Choose the response that fits / continued

4. Rebuild the exchange from "Annual run rate is not money already realized". Oscar: "The one-time implementation expense was ninety thousand in the same period, and the report uses the stated cash basis." Nina: [missing response] Oscar: "The net realized benefit is therefore sixty thousand, even though the monthly saving could continue beyond this quarter." Which response belongs in the gap?

- A.** Good. Complete the required finance validation and retain the evidence, so the report is credible rather than merely larger.
- B.** Put that in the benefit register, with a single accountable owner for assembling and validating the evidence.
- C.** Yes. The agreed baseline and any adjustments need to be traceable rather than reconstructed after the result is announced.
- D.** Then include the one-time integration cost rather than letting the headline imply the change was free to deliver.

[Answers and explanations, page 136](#)

One useful distinction

$50,000 \times 3 = 150,000$ gross realized; $150,000 - 90,000 = 60,000$ net realized. $50,000 \times 12 = 600,000$ annualized run rate, not a completed-year saving.

E Conversation

Annual run rate is not money already realized

Annual run rate is not money already realized

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

WORD AND PHRASE BANK

benefit register / baseline / net benefit / double counting / finance validation /
one-time integration cost / benefit bridge / Cost avoidance / run-rate saving /
in-period realization

- 01 **Oscar:** The procurement change saves fifty thousand dollars a month, so I reported six hundred thousand as realized integration savings.
- 02 **Nina:** That is the annualized ¹ _____, not the completed-period result. We have three months of actual savings in the record we have.
- 03 **Oscar:** Three times fifty thousand gives one hundred fifty thousand of gross savings for those completed months.
- 04 **Nina:** Correct. That is the ² _____ before the related cost included in this reporting basis.
- 05 **Oscar:** The one-time implementation expense was ninety thousand in the same period, and the report uses the stated cash basis.
- 06 **Nina:** Then include the ³ _____ rather than letting the headline imply the change was free to deliver.
- 07 **Oscar:** The net realized benefit is therefore sixty thousand, even though the monthly saving could continue beyond this quarter.
- 08 **Nina:** Exactly. The ⁴ _____ and the annual run rate are useful but different measures.
- 09 **Oscar:** I also noticed that IT listed the same vendor reduction in its workstream total because it helped remove duplicate licenses.
- 10 **Nina:** We need to prevent ⁵ _____. Acknowledging both teams does not create two separate economic benefits.

Conversation continues on the next page.

Annual run rate is not money already realized

CONVERSATION / CONTINUED

- 11 **Oscar:** We can assign one shared record to the saving and show IT and procurement as contributors.
- 12 **Nina:** Put that in the ⁶ _____, with a single accountable owner for assembling and validating the evidence.
- 13 **Oscar:** We should also identify the reference cost we compared against, so the saving is not based on an unexplained estimate.
- 14 **Nina:** Yes. The agreed ⁷ _____ and any adjustments need to be traceable rather than reconstructed after the result is announced.
- 15 **Oscar:** If a planned future expense never occurs, should we record that in the same way as this reduction in an existing cost?
- 16 **Nina:** Not automatically. ⁸ _____ needs its own definition and evidence under the reporting methodology.
- 17 **Oscar:** I will show the monthly rate, actual months, gross amount, included cost, and net result in the steering pack.
- 18 **Nina:** That creates a clear ⁹ _____, with the six-hundred-thousand annualization labeled separately.
- 19 **Oscar:** The revised headline will acknowledge the ongoing opportunity without saying that a full year's saving has already been achieved.
- 20 **Nina:** Good. Complete the required ¹⁰ _____ and retain the evidence, so the report is credible rather than merely larger.

CHECK THE GAPS

1. run-rate saving / **2.** in-period realization / **3.** one-time integration cost / **4.** net benefit / **5.** double counting / **6.** benefit register / **7.** baseline / **8.** Cost avoidance / **9.** benefit bridge / **10.** finance validation

[Why these answers fit, page 137](#)

F Check accuracy and scope

Annual run rate is not money already realized

Return to the case

A fictional procurement change saves USD 50,000 per month for three completed months against the agreed baseline. Gross realized savings are USD 150,000. A one-time integration cost of USD 90,000 belongs to the same reporting period and defined cash basis, giving USD 60,000 net realized benefit. Annualizing the monthly saving gives a USD 600,000 run rate, not a realized full-year result. IT and procurement both list the same saving in their workstream reports.

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

1. Which item is needed to interpret savings?

- A. A count of how many teams attended meetings
- B. The agreed baseline and reporting basis
- C. Only a larger headline figure
- D. A promise that all future months are identical

2. What does the annual run rate assume?

- A. That twelve months have already elapsed
- B. That no future risk can change the saving
- C. That integration costs never exist
- D. Continuation of the stated monthly rate for annualization

[Answers and explanations, page 139](#)

Listen for the distinction

Switch roles and explain how two teams can contribute without creating two separately counted savings.

Make a defensible result visible

A smaller, correctly labeled realized benefit is more useful than an inflated headline. Shared contributions can be acknowledged without booking the same saving twice.

F Say it / transfer to a new case

A forecast entered the realized column

A future supplier change is forecast to save USD 20,000 monthly after approval. Approval and implementation have not occurred, and no saving has been realized.

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

total / realized / forecast / outstanding

- 01 **Lead:** The amount is currently a ¹ _____.
- 02 **Finance:** The required approval remains ² _____.
- 03 **Lead:** No benefit has been ³ _____.
- 04 **Finance:** Keep it out of the realized-benefit ⁴ _____.

CHECK THE GAPS

1. forecast / 2. outstanding / 3. realized / 4. total

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

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 "Annual run rate is not money already realized". Oscar: "We should also identify the reference cost we compared against, so the saving is not based on an unexplained estimate." Nina: [missing response] Oscar: "If a planned future expense never occurs, should we record that in the same way as this reduction in an existing cost?" Which response belongs in the gap?

- A.** Good. Complete the required finance validation and retain the evidence, so the report is credible rather than merely larger.
- B.** Yes. The agreed baseline and any adjustments need to be traceable rather than reconstructed after the result is announced.
- C.** Put that in the benefit register, with a single accountable owner for assembling and validating the evidence.
- D.** Then include the one-time integration cost rather than letting the headline imply the change was free to deliver.

[Answers and explanations, page 140](#)

A Read the situation

LESSON 08 / HANDING OVER TO BUSINESS-AS-USUAL OWNERS

Confirm acceptance evidence, ongoing support, and residual-risk ownership before closing integration work.

An assigned issue is not a resolved issue

The fictional handover plan requires five consecutive stable operating days before service acceptance. The new process has completed two stable days. A reporting defect remains open but has an identified finance owner. Sponsor Morgan wants the integration workstream closed immediately. Consultant Arjun explains the unmet acceptance condition and prepares the operational ownership, support, and open-item records without claiming that assignment means resolution.

People: Morgan, Integration sponsor; Arjun, Integration consultant.

Read the record

Choose one answer per question using the facts above.

1. How many stable days are required by this fictional plan?

- A. Five consecutive days
- B. Two days
- C. Any single successful login
- D. An unspecified month

2. What is the reporting defect's status?

- A. Open with a named finance owner
- B. Resolved because someone owns it
- C. Deleted from the record
- D. Accepted as proof that every process is stable

3. Why is immediate acceptance unsupported?

- A. The transaction never closed
- B. Every support contact is forbidden
- C. The process has no owner at all
- D. Only two of the required five stable days are complete

[Answers and explanations, page 141](#)

B Vocabulary in use

CORE TERMS

business as usual

Ongoing operational work after the temporary integration phase.

transition to business as usual

service acceptance

Formal acceptance of an operational service under the actual process.

obtain service acceptance

knowledge transfer

Handover of information and practical capability to another team.

complete knowledge transfer

standard operating procedure

Approved instructions for a defined recurring process.

update the standard operating procedure

defect backlog

Record of unresolved defects and their status.

maintain the defect backlog

support coverage

Availability and scope of assistance during stated periods.

confirm support coverage

acceptance criteria

Conditions that must be met for the stated acceptance decision.

verify acceptance criteria

operational signoff

Authorized confirmation of operational readiness or acceptance.

secure operational signoff

runbook

Operational instructions and responsibilities for recurring tasks or incidents.

validate the runbook

open risk

Identified unresolved uncertainty or exposure.

retain an open risk

incident owner

Person responsible for handling a specified operational incident.

name the incident owner

monitoring cadence

Frequency of reviewing operational indicators or issues.

agree the monitoring cadence

Say it in context

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

business as usual BUSINESS AS USUAL

transition to business as usual

Keep the meaning precise: Ongoing operational work after the temporary integration phase.

runbook RUNBOOK

validate the runbook

Keep the meaning precise: Operational instructions and responsibilities for recurring tasks or incidents.

B Precision and professional shorthand

EXTEND YOUR RANGE

escalation contact

Named route for raising an issue requiring further authority or support.

verify the escalation contact

ownership transfer

Explicit handover of responsibility to the receiving role.

document ownership transfer

closure report

Record of completed scope, outstanding matters, and closure authority.

prepare the closure report

clarification request

Question that resolves an unclear meaning or instruction.

make a targeted clarification request

working assumption

Provisional premise used while information is incomplete.

challenge a working assumption

action owner

Named person responsible for a specified next step.

confirm the action owner

operating budget

Resources allocated for ongoing operations.

confirm the operating budget

transition exit

Completion of the defined temporary transition arrangement.

approve transition exit

post-integration review

Evaluation of integration results and remaining lessons after the transition.

schedule a post-integration review

source attribution

Identification of where information came from.

preserve source attribution

scope boundary

Limit of the work or authority being discussed.

state the scope boundary

check-back

Restatement used to verify that a message was understood.

complete a check-back

Say it in context

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

monitoring cadence MONITORING CADENCE

agree the monitoring cadence

Keep the meaning precise: Frequency of reviewing operational indicators or issues.

closure report CLOSURE REPORT

prepare the closure report

Keep the meaning precise: Record of completed scope, outstanding matters, and closure authority.

Phrases that move the work forward

Check the criterion

We have completed two stable days against a five-day requirement.

Confirm the receiver

Who accepts the ongoing operational responsibility?

Preserve the record

Open items must remain visible after the project label changes.

Avoid a false close

We can prepare the handover without declaring acceptance complete.

Morgan / in the conversation

The process has worked for two days, and finance owns the remaining reporting issue.

Arjun / in the conversation

We have completed two, not the required five.

Arjun / in the conversation

We can plan the handover, but service acceptance and closure need their actual evidence and authority.

Morgan / in the conversation

Does that at least mean we can mark the defect closed?

Separate assignment and resolution

Finance owns the defect, but the defect is still open.

Make support usable

The receiving team needs the runbook and actual escalation contacts.

Clarify authority

Any exception needs the stated approval; it cannot be implied by a target date.

Close deliberately

Record completed scope, remaining obligations, and the authorized closure decision.

Arjun / in the conversation

The acceptance criteria specify five consecutive stable days.

Morgan / in the conversation

I do not want the integration team to remain indefinitely just because one minor report still needs attention.

Morgan / in the conversation

The finance lead has accepted responsibility for the report.

Arjun / in the conversation

The defect backlog should show it as open with an owner, next action, and review route.

Precision in real exchanges

Purpose: Make support usable

Useful wording: The receiving team needs the runbook and actual escalation contacts.

Purpose: Preserve the record

Useful wording: Open items must remain visible after the project label changes.

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 status report is accurate?

- A.** The defect is resolved because finance owns it
- B.** Every open item disappears at handover
- C.** Two stable days complete; acceptance condition unmet
- D.** Five stable days complete because the sponsor wants closure

2. What should happen to the defect at handover?

- A.** Retain its status, owner, next action, and review route
- B.** Remove it because the project is ending
- C.** Mark it closed without evidence
- D.** Transfer it to an unnamed department

3. A colleague needs the term for this meaning: Authorized confirmation of operational readiness or acceptance. Which term fits?

- A.** ownership transfer
- B.** defect backlog
- C.** operational signoff
- D.** working assumption

D Choose the response that fits / continued

4. Rebuild the exchange from "An assigned issue is not a resolved issue". Morgan: "The finance lead has accepted responsibility for the report. Does that at least mean we can mark the defect closed?" Arjun: [missing response] Morgan: "The receiving team also needs to know how the new process works and whom to contact when something fails." Which response belongs in the gap?

- A.** We can plan the handover, but service acceptance and closure need their actual evidence and authority.
- B.** Include that distinction in the closure report, along with the reporting defect and the named operational responsibilities.
- C.** The acceptance criteria specify five consecutive stable days. We have completed two, not the required five.
- D.** No. The defect backlog should show it as open with an owner, next action, and review route.

[Answers and explanations, page 141](#)

One useful distinction

Two stable days do not satisfy the supplied five-consecutive-day criterion. An open defect remains open when an owner is assigned.

Conversation

An assigned issue is not a resolved issue

An assigned issue is not a resolved issue

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

WORD AND PHRASE BANK

post-integration review / Ownership transfer / runbook / closure report /
acceptance criteria / defect backlog / service acceptance / open risk / Support coverage
/ knowledge transfer

- 01 **Morgan:** The process has worked for two days, and finance owns the remaining reporting issue. Can we close the workstream today?
- 02 **Arjun:** The ¹ _____ specify five consecutive stable days. We have completed two, not the required five.
- 03 **Morgan:** I do not want the integration team to remain indefinitely just because one minor report still needs attention.
- 04 **Arjun:** We can plan the handover, but ² _____ and closure need their actual evidence and authority.
- 05 **Morgan:** The finance lead has accepted responsibility for the report. Does that at least mean we can mark the defect closed?
- 06 **Arjun:** No. The ³ _____ should show it as open with an owner, next action, and review route.
- 07 **Morgan:** The receiving team also needs to know how the new process works and whom to contact when something fails.
- 08 **Arjun:** That is ⁴ _____, not just a document email. We need to check that the operational team can use the material.
- 09 **Morgan:** We have a draft procedure, but the escalation contact still points to a consultant who leaves next week.
- 10 **Arjun:** Then the ⁵ _____ needs a workable ongoing contact before we describe the support arrangement as complete.

Conversation continues on the next page.

An assigned issue is not a resolved issue

CONVERSATION / CONTINUED

- 11 **Morgan:** We should confirm the hours and scope of support instead of assuming the receiving team provides the same transition coverage.
- 12 **Arjun:** Yes. ⁶ _____ and the operating resources need explicit agreement.
- 13 **Morgan:** Could we say the handover is prepared while leaving acceptance pending until the stated conditions are met?
- 14 **Arjun:** That is accurate. ⁷ _____ still needs the receiving role's actual acceptance and the required record.
- 15 **Morgan:** If leadership wants an exception to the five-day condition, it should be a visible decision through the specified authority.
- 16 **Arjun:** Correct. Do not hide an ⁸ _____ by changing the status label. Any exception needs its actual approval and conditions.
- 17 **Morgan:** I will tell the sponsor group that handover preparation is progressing, but the operating evidence does not yet meet the criterion.
- 18 **Arjun:** Include that distinction in the ⁹ _____, along with the reporting defect and the named operational responsibilities.
- 19 **Morgan:** After acceptance, we should review whether the integration achieved its intended service and value outcomes, not just whether the project ended.
- 20 **Arjun:** Schedule the ¹⁰ _____. That keeps attention on the ongoing business result without declaring unfinished work complete today.

CHECK THE GAPS

1. acceptance criteria / 2. service acceptance / 3. defect backlog / 4. knowledge transfer / 5. runbook / 6. Support coverage / 7. Ownership transfer / 8. open risk / 9. closure report / 10. post-integration review

[Why these answers fit, page 142](#)

F Check accuracy and scope

An assigned issue is not a resolved issue

Return to the case

The fictional handover plan requires five consecutive stable operating days before service acceptance. The new process has completed two stable days. A reporting defect remains open but has an identified finance owner. Sponsor Morgan wants the integration workstream closed immediately. Consultant Arjun explains the unmet acceptance condition and prepares the operational ownership, support, and open-item records without claiming that assignment means resolution.

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

1. What should knowledge transfer establish?

- A. A promise that no incident can occur
- B. The receiving team's practical ability to operate the process
- C. Only that a file was emailed
- D. Only a new organization chart

2. What is required for an exception to the criterion?

- A. A green status color
- B. The consultant's wish to finish
- C. The actual specified exception authority and process
- D. An implied waiver from schedule pressure

[Answers and explanations, page 144](#)

Listen for the distinction

Switch roles and give the handover status using the two completed days, five-day criterion, and open reporting defect.

A clear handover protects both teams

An integration team should not disappear behind a green status. The receiving operation needs evidence, workable support, and explicit ownership of remaining work.

F Say it / transfer to a new case

A file transfer was called knowledge transfer

The consultant emails the runbook. The receiving team has not reviewed it, confirmed the contacts, or accepted responsibility.

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

accepted / pending / sent / transfer

- 01 **Consultant:** The document has been ¹ _____.
- 02 **Operator:** Our practical review is still ² _____.
- 03 **Consultant:** Responsibility has not been formally ³ _____.
- 04 **Operator:** We need a usable handover, not only a file ⁴ _____.

CHECK THE GAPS

1. sent / 2. pending / 3. accepted / 4. transfer

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

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 "An assigned issue is not a resolved issue". Morgan: "Could we say the handover is prepared while leaving acceptance pending until the stated conditions are met?" Arjun: [missing response] Morgan: "If leadership wants an exception to the five-day condition, it should be a visible decision through the specified authority." Which response belongs in the gap?

- A.** That is accurate. Ownership transfer still needs the receiving role's actual acceptance and the required record.
- B.** We can plan the handover, but service acceptance and closure need their actual evidence and authority.
- C.** Then the runbook needs a workable ongoing contact before we describe the support arrangement as complete.
- D.** The acceptance criteria specify five consecutive stable days. We have completed two, not the required five.

[Answers and explanations, page 145](#)

Review 4 / Meaning and context

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

Case file

Revisit "Reporting integration synergies without double counting" and "Handing over to business-as-usual owners". 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: Benefit before the specified related costs. Which term fits?

- A. gross saving
- B. benefit owner
- C. revenue synergy
- D. source attribution

2. A colleague needs the term for this meaning: Identified unresolved uncertainty or exposure. Which term fits?

- A. clarification request
- B. business as usual
- C. open risk
- D. escalation contact

3. Rebuild the exchange from "New ownership does not rewrite every invoice instruction". Sofia: "I will not send a replacement account number or ask the customer to choose between the two sets of instructions." Daniel: [missing response] Sofia: "The logo and correct account-manager name make the email look convincing, but those details do not establish that it is genuine." Which response belongs in the gap?

- A. That protects customer continuity without pretending that every integration question is already resolved.
- B. Good. Payment redirection needs the actual controlled process and verified authorization.
- C. Separate the brand transition from the payment request. The approved plan has not changed the remittance instructions.
- D. Exactly. Any vendor master change should follow the customer's and our actual verification requirements.

Review 4 / Meaning and context / continued

4. Rebuild the exchange from "An assigned issue is not a resolved issue". Morgan: "I will tell the sponsor group that handover preparation is progressing, but the operating evidence does not yet meet the criterion." Arjun: [missing response] Morgan: "After acceptance, we should review whether the integration achieved its intended service and value outcomes, not just whether the project ended." Which response belongs in the gap?

- A.** The acceptance criteria specify five consecutive stable days. We have completed two, not the required five.
- B.** No. The defect backlog should show it as open with an owner, next action, and review route.
- C.** We can plan the handover, but service acceptance and closure need their actual evidence and authority.
- D.** Include that distinction in the closure report, along with the reporting defect and the named operational responsibilities.

[Answers and explanations, page 154](#)

Language for the next case

A requested extension does not keep a transition service running

standalone capability

Standalone capability requires the receiving operation to perform its defined function reliably without the temporary service, not merely produce an unchecked report.

Maya: Then generation alone does not establish standalone capability. We need to distinguish a working screen from an accepted business result.

service boundary

The service boundary defines the actual support included, so an extension of time would not automatically add new tasks or broader access.

Maya: Good. The service boundary also matters. More time, if agreed, would not automatically include extra tasks.

continuity risk

The continuity risk is the possible interruption or unreliable operation after support ends, which requires authorized resolution rather than an assumed extension.

Maya: Correct. Raise the continuity risk with the decision owner while the current service is still available.

extension request

An extension request proposes a change to the service period but does not establish that the other party has agreed to provide it.

Maya: Receipt is not agreement to the extension request. The current end time remains the planning constraint.

exit criteria

Exit criteria state the evidence required before leaving the temporary arrangement, including reconciliation rather than merely generating a replacement report.

Maya: Record those exit criteria explicitly so the exit decision is based on the actual receiving process.

transition plan

The transition plan must reflect confirmed service arrangements and actual replacement readiness rather than a requested extension being treated as completed.

Maya: Exactly. Update the transition plan from the authorized decision and preserve the earlier status.

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

Conversation

A requested extension does not keep a transition service running

The fictional transition service agreement provides seller-operated reporting support through Friday at 18:00 New York local time. The buyer has requested an extension, but none has been agreed. A replacement report can be generated but its totals have not been reconciled. No unapproved work-around, continued seller access, or extension is authorized.

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

WORD AND PHRASE BANK

standalone capability / exit criteria / service boundary / continuity risk / transition plan / extension request

- 01 **Maya:** The seller provides reporting support until Friday at six in the evening, New York time. Can your team operate independently after that?
- 02 **Eric:** We can generate the replacement report, but its totals have not been reconciled against the approved source.
- 03 **Maya:** Then generation alone does not establish ¹ _____. We need to distinguish a working screen from an accepted business result.
- 04 **Eric:** I requested another week of support. The seller acknowledged receiving the request, so I thought we had extra time.
- 05 **Maya:** Receipt is not agreement to the ² _____. The current end time remains the planning constraint.
- 06 **Eric:** I will correct the tracker. It currently says extended, which makes the replacement work look less urgent than it is.

Conversation / continued

- 07 **Maya:** Good. The ³ _____ also matters. More time, if agreed, would not automatically include extra tasks.
- 08 **Eric:** We need the authorized owners to review any changed scope, cost, access, and support arrangements with the seller.
- 09 **Maya:** Yes. Meanwhile, what evidence is still missing from the replacement report, and who can verify it?
- 10 **Eric:** The finance owner needs the totals reconciled and the discrepancies explained. We have not completed that review.

Conversation continues on the next page.

A requested extension does not keep a transition service running

CONVERSATION / CONTINUED

- 11 **Maya:** Record those ⁴ _____ explicitly so the exit decision is based on the actual receiving process.
- 12 **Eric:** The timing is tight, but I should not certify the totals or presume continued seller access just to make the dashboard green.
- 13 **Maya:** Correct. Raise the ⁵ _____ with the decision owner while the current service is still available.
- 14 **Eric:** I can supply the remaining checks, their owners, and the impact if the service ends before the replacement is accepted.
- 15 **Maya:** That makes the escalation actionable. Keep the current contract status separate from any option being discussed.
- 16 **Eric:** If the parties agree an extension, the confirmed terms need to reach the receiving team before anyone changes the plan.
- 17 **Maya:** Exactly. Update the ⁶ _____ from the authorized decision and preserve the earlier status.
- 18 **Eric:** For now, I will report the Friday end time, the unagreed extension request, and the unresolved reconciliation.
- 19 **Maya:** That is a clear account of what works, what expires, and what still needs a decision.
- 20 **Eric:** I will also name the next update time so neither team assumes the other is silently handling the gap.

CHECK THE GAPS

1. standalone capability / **2.** extension request / **3.** service boundary / **4.** exit criteria / **5.** continuity risk / **6.** transition plan

[Why these answers fit, page 157](#)

Acknowledged was changed to agreed

The seller acknowledges an extension request but has not agreed to extend support. The original service end time still applies.

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

WORD AND PHRASE BANK

acknowledged / agreed / time / risk

- 01 **Consultant:** The request was ¹ _____.
- 02 **Lead:** An extension has not been ² _____.
- 03 **Consultant:** Keep the original end ³ _____ visible.
- 04 **Lead:** Escalate the continuity ⁴ _____.

CHECK THE GAPS

1. acknowledged / 2. agreed / 3. time / 4. risk

[Why these answers fit, page 157](#)

Keep the distinction audible

Separate a contractual service window, a requested extension, and tested replacement capability.

Language for the next case

One handoff instant appears on two calendar dates

UTC-05:00

The originating timestamp explicitly uses UTC-05:00; the conversion depends on this supplied offset rather than an assumed seasonal city rule.

Noah: Our agreed time is twenty-three hundred on November fourteenth at UTC-05:00. That is the offset written in the handoff plan.

timestamp

A timestamp that includes the date, time, and offset identifies the intended instant more precisely than a date-only label.

Yuki: Exactly. Preserve the timestamp with its date, time, and offset instead of relying on an unexplained local date.

acceptance

Acceptance requires an explicit receiving commitment under the stated handoff process, not merely the existence of a calendar invitation.

Yuki: Yes. A sent invitation is not my acceptance of the operational handoff.

UTC+09:00

The receiving timestamp uses UTC+09:00, fourteen hours ahead of the supplied originating offset, placing the event on the next local date.

Yuki: For my calendar, the same instant is thirteen hundred on November fifteenth at UTC+09:00. The dates differ, but the event has not moved.

handoff window

The handoff window specifies the agreed time available for the transfer and should be communicated consistently across calendars.

Yuki: Good. Include the source system and the planned handoff window rather than only the meeting title.

change notice

The change notice communicates an actual schedule change, distinct from correcting two local representations of an unchanged instant.

Yuki: And record the change notice so nobody mistakes a formatting correction for a new operational deadline.

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

Conversation

One handoff instant appears on two calendar dates

For this fictional exercise only, the agreed handoff is 23:00 on 14 November at UTC-05:00, which is 13:00 on 15 November at UTC+09:00. Those explicit offsets define the conversion; no inference about a city's seasonal clock rules is needed. The tracker says November 14 without a time or zone. The receiving lead has not accepted the handoff.

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

WORD AND PHRASE BANK

UTC+09:00 / acceptance / handoff window / timestamp / change notice / UTC-05:00

- 01 **Noah:** The tracker says November fourteenth, but your calendar says the fifteenth. I assumed one of us had moved the handoff.
- 02 **Yuki:** We may be describing the same instant on different local dates. Let us read back the complete timestamp before changing anything.
- 03 **Noah:** Our agreed time is twenty-three hundred on November fourteenth at
1 _____. That is the offset written in the handoff plan.
- 04 **Yuki:** For my calendar, the same instant is thirteen hundred on November fifteenth at
2 _____. The dates differ, but the event has not moved.
- 05 **Noah:** Then the short date label loses information we need. It could send someone to the bridge on the wrong day.
- 06 **Yuki:** Exactly. Preserve the 3 _____ with its date, time, and offset instead of relying on an unexplained local date.
- 07 **Noah:** The numeric version of the date also needs care because teams may read the month and day in different orders.
- 08 **Yuki:** Use the agreed unambiguous format and read it back. Do not infer that everyone interprets a short numeric date the same way.
- 09 **Noah:** I will update the meeting invitation and tracker together so we do not leave conflicting versions in circulation.
- 10 **Yuki:** Good. Include the source system and the planned 4 _____ rather than only the meeting title.

Conversation continues on the next page.

One handoff instant appears on two calendar dates

CONVERSATION / CONTINUED

- 11 **Noah:** We also need to check whether the receiving person can attend at that actual local time, not just whether the invitation was sent.
- 12 **Yuki:** Yes. A sent invitation is not my ⁵ _____ of the operational handoff.
- 13 **Noah:** The reporting pack is ready to share, but I will keep the receiving acceptance open until you confirm the required checks.
- 14 **Yuki:** That is appropriate. The correct timestamp solves the scheduling ambiguity, not the readiness or responsibility questions.
- 15 **Noah:** If the agreed event time changes, we should update both representations from one authoritative source.
- 16 **Yuki:** And record the ⁶ _____ so nobody mistakes a formatting correction for a new operational deadline.
- 17 **Noah:** For this correction, the instant remains unchanged: November fourteenth at twenty-three hundred with the minus-five offset.
- 18 **Yuki:** Which is November fifteenth at thirteen hundred with the plus-nine offset. I will confirm availability separately from operational acceptance.
- 19 **Noah:** I will send the corrected record with the open acceptance item and the responsible owner.
- 20 **Yuki:** Good. The teams will share one event and one status, even though their calendars display different dates.

CHECK THE GAPS

1. UTC-05:00 / 2. UTC+09:00 / 3. timestamp / 4. handoff window / 5. acceptance / 6. change notice

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

Same instant, different local date

Use only these supplied equivalents: 23:00 on 14 November at UTC-05:00 equals 13:00 on 15 November at UTC+09:00.

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

WORD AND PHRASE BANK

fifteenth / unchanged / fourteenth / offset

- 01 **US lead:** Our local date is November ¹ _____.
- 02 **Receiving lead:** Our local date is November ² _____.
- 03 **US lead:** The underlying instant is ³ _____.
- 04 **Receiving lead:** Always include the UTC ⁴ _____.

CHECK THE GAPS

1. fourteenth / 2. fifteenth / 3. unchanged / 4. offset

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

Keep the distinction audible

Read back a cross-border handoff using a date, time, and explicit UTC offset.

Language for the next case

Two green delivery dashboards measure different events

metric definition

The metric definition specifies the event being measured, which differs between dispatch and customer arrival despite the shared dashboard label.

Consultant: Then the metric definition differs even though the dashboard labels look identical.

common baseline

A common baseline requires an agreed comparable definition before historical figures can support a combined trend or integration-effect claim.

Consultant: Exactly. We need a common baseline before claiming that integration improved or damaged performance.

measurement specification

The measurement specification records the agreed event, population, exclusions, and calculation rules rather than relying on a familiar but ambiguous label.

Consultant: Put those rules in the measurement specification with the owner who can approve the reporting definition.

denominator

The denominator is the hundred orders in this sample, so the difference described here is the measured event rather than a different order count.

Consultant: Both calculations use the same denominator, but they answer different operational questions.

data lineage

Data lineage traces the reported figure to the underlying records and transformations so the team can verify how each measure was produced.

Consultant: Document that data lineage so the final number can be traced to the actual event and calculation.

combined KPI

A combined KPI requires comparable definitions and supporting data; matching labels alone do not make two operational measures interchangeable.

Consultant: That will prevent a superficial standardization from producing a misleading combined KPI for the acquired and acquiring businesses.

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

Conversation

Two green delivery dashboards measure different events

The acquired company labels an order on time when it leaves the warehouse by the promised dispatch time. The buyer labels it on time when it reaches the customer by the promised delivery time. In a fictional sample of 100 orders, 95 meet the dispatch promise and 82 meet the delivery promise. No common combined historical metric has yet been agreed.

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

WORD AND PHRASE BANK

measurement specification / denominator / data lineage / metric definition /
common baseline / combined KPI

- 01 **Consultant:** Both dashboards say on-time delivery, but one reports ninety-five percent and the other reports eighty-two. Is one calculation wrong?
- 02 **Operations:** Not necessarily. The first checks whether the order left our warehouse on time; the second checks arrival at the customer.
- 03 **Consultant:** Then the ¹ _____ differs even though the dashboard labels look identical.
- 04 **Operations:** Correct. In this sample, ninety-five of the hundred orders met the dispatch promise and eighty-two met the delivery promise.
- 05 **Consultant:** Both calculations use the same ² _____, but they answer different operational questions.
- 06 **Operations:** We should not call the thirteen-percentage-point difference a decline after acquisition. We have not established a comparable before-and-after measure.

Conversation / continued

- 07 **Consultant:** Exactly. We need a ³ _____ before claiming that integration improved or damaged performance.
- 08 **Operations:** The source records may support both measures, but we need to check the event timestamps and the promise recorded for each order.
- 09 **Consultant:** Document that ⁴ _____ so the final number can be traced to the actual event and calculation.
- 10 **Operations:** Some orders have a dispatch timestamp but no verified customer-arrival record. That should remain a data gap, not an invented arrival.

Conversation continues on the next page.

Two green delivery dashboards measure different events

CONVERSATION / CONTINUED

- 11 **Consultant:** Yes. Missing arrival evidence must not be silently converted into a pass or treated as proof of the actual delivery time.
- 12 **Operations:** We also need to agree how to handle cancellations and changed promises before combining later reporting periods.
- 13 **Consultant:** Put those rules in the ⁵ _____ with the owner who can approve the reporting definition.
- 14 **Operations:** Until that is agreed, the steering report can show dispatch performance and arrival performance separately with accurate labels.
- 15 **Consultant:** That will prevent a superficial standardization from producing a misleading ⁶ _____ for the acquired and acquiring businesses.
- 16 **Operations:** Should we average ninety-five and eighty-two and call that our overall delivery score?
- 17 **Consultant:** Not as a substitute for a defined measure. Those percentages describe different events, so their average would answer no agreed question.
- 18 **Operations:** I will relabel the current figures and prepare the definition differences for the process owners to decide.
- 19 **Consultant:** Good. Keep the original records intact so the team can reconstruct the reporting change.
- 20 **Operations:** Then the integration report can explain the current results honestly while the common measurement approach is being established.

CHECK THE GAPS

1. metric definition / 2. denominator / 3. common baseline / 4. data lineage / 5. measurement specification / 6. combined KPI

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

A dispatch result became an arrival promise

Of 100 orders, 95 meet the dispatch promise and 82 meet the arrival promise. The two events must remain separately labeled.

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

WORD AND PHRASE BANK

arrival / decline / dispatch / different

- 01 **Analyst:** Ninety-five percent met the ¹ _____ promise.
- 02 **Lead:** Eighty-two percent met the ² _____ promise.
- 03 **Analyst:** The event definitions are ³ _____.
- 04 **Lead:** Do not infer an integration-related ⁴ _____.

CHECK THE GAPS

1. dispatch / 2. arrival / 3. different / 4. decline

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

Keep the distinction audible

Reconcile metric definitions before combining acquired and acquiring company performance.

01 / Answers and explanations

A / Read the situation

A1. What has been completed?

C. Legal acquisition closing

The transaction closed Friday, while the shared platform remains unready.

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

A2. Which process continues under the supplied plan?

A. The existing approved payroll process

The brief explicitly retains the existing approved payroll process for continuity.

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

A3. What should be separated from Monday continuity?

C. The later platform migration

The migration is later work with readiness and authorization still outstanding.

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

D / Response choices

D1. Which Monday message is supported?

C. Payroll continues under the existing approved process

The brief explicitly retains the current payroll process while the new platform is unready.

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

D2. Which question identifies continuity responsibility?

A. Who owns payroll operation during the transition?

A named operational owner is needed rather than an assumption from corporate ownership.

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

01 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: Team coordinating integration governance and workstreams. Which term fits?

D. integration management office

A Not here. standalone capability: Ability to perform a function without the temporary support being replaced. The usual combination is "establish standalone capability".

B Not here. working assumption: Provisional premise used while information is incomplete. The usual combination is "challenge a working assumption".

C Not here. hypercare: Time-limited heightened support after a transition. The usual combination is "plan hypercare coverage".

D Correct. integration management office: Team coordinating integration governance and workstreams. The usual combination is "establish the integration management office".

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

D4. Rebuild the exchange from "The deal closed; the payroll process did not move overnight". Aya: "Payroll currently runs through the existing approved process. No one has authorized moving it to the new platform this week." Marcus: [missing response] Aya: "Some colleagues may see the old process continuing as a sign that the local team is resisting the acquisition." Which response belongs in the gap?

A. Keep that business continuity message explicit. Employees should not infer a pay-process change from a new ownership announcement.

A Correct. This is Marcus's response in turn 6. It connects Aya's preceding point with Aya's follow-up. Business continuity preserves required operations through the transition instead of making an unready migration a symbolic sign of progress.

B Not here. This line belongs to turn 4, after Aya says: "Then the first question is what must function when employees arrive, rather than how many new processes we can announce." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 14, after Aya says: "We also need a named person responsible if employees cannot access the payroll support channel on Monday." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 2, after Aya says: "The acquisition closed on Friday. Headquarters would like Monday's message to say that everyone is now fully integrated." It addresses that point, not the missing turn in the supplied exchange.

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

E / Conversation

1. legal close

Turn 2. Legal close confirms the completed transaction but does not establish that operational systems and processes have been integrated.

01 / Answers and explanations / continued

2. Day 1 readiness

Turn 4. Day 1 readiness concerns the specified immediate operating requirements rather than completion of the entire future integration plan.

3. business continuity

Turn 6. Business continuity preserves required operations through the transition instead of making an unready migration a symbolic sign of progress.

4. interim operating model

Turn 8. The interim operating model is the deliberate temporary arrangement used while later integration prerequisites remain unresolved.

5. dependency

Turn 10. A dependency identifies a prerequisite for the later migration and prevents the task from being scheduled as though readiness already exists.

6. integration management office

Turn 12. The integration management office coordinates workstreams and governance but does not automatically replace every functional decision owner.

7. continuity owner

Turn 14. The continuity owner is the named person responsible for sustaining the specified service during transition, not an assumed responsibility of the buyer in general.

8. service desk

Turn 16. The service desk provides the user support route and needs accurate transition information rather than an overbroad claim that every system has changed.

9. readiness checkpoint

Turn 18. A readiness checkpoint reviews the stated prerequisites and evidence before the relevant transition rather than substituting a calendar date for readiness.

10. target operating model

Turn 20. The target operating model describes the intended future arrangement, which must remain distinct from the current interim state and completed Day 1 scope.

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

01 / Answers and explanations / continued

F / Accuracy and scope

F1. What should a readiness statement include?

D. The specific services and scope checked

Readiness has meaning only in relation to stated requirements and evidence.

[Return to the exercise, page 12](#)

F2. Which action is not authorized by the case?

A. Migrating payroll immediately

The brief expressly says no immediate payroll migration is authorized.

[Return to the exercise, page 12](#)

F / Guided speaking

1. changed

Employee: The branding has changed.

Turn 1. The portal appearance has changed, but that does not establish a new operating process.

2. unchanged

Consultant: The approved support route remains unchanged.

Turn 2. The brief explicitly retains the existing support process.

3. launched

Employee: The shared platform has not launched.

Turn 3. The new platform is not yet in operation in the supplied case.

4. process

Consultant: Use the current approved process.

Turn 4. Employees should follow the actual operating arrangement rather than infer a change from branding.

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

01 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "The deal closed; the payroll process did not move overnight". Aya: "We also need a named person responsible if employees cannot access the payroll support channel on Monday." Marcus: [missing response] Aya: "The service desk needs a clear briefing on what changes now, what stays the same, and where to route unanswered questions." Which response belongs in the gap?

B. Assign a continuity owner and an escalation route rather than leave responsibility attached only to a department name.

A Not here. This line belongs to turn 6, after Aya says: "Payroll currently runs through the existing approved process. No one has authorized moving it to the new platform this week." It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Marcus's response in turn 14. It connects Aya's preceding point with Aya's follow-up. The continuity owner is the named person responsible for sustaining the specified service during transition, not an assumed responsibility of the buyer in general.

C Not here. This line belongs to turn 4, after Aya says: "Then the first question is what must function when employees arrive, rather than how many new processes we can announce." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 2, after Aya says: "The acquisition closed on Friday. Headquarters would like Monday's message to say that everyone is now fully integrated." It addresses that point, not the missing turn in the supplied exchange.

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

02 / Answers and explanations

A / Read the situation

A1. What did the sponsor provide?

C. Support for the standardization concept

The brief identifies conceptual support, not the required completed decision steps.

[Return to the exercise, page 14](#)

A2. Who coordinates but cannot approve the change?

C. Leo

Leo's stated role is coordination, without process-change approval authority.

[Return to the exercise, page 14](#)

A3. Which sequence is required before implementation here?

D. Finance ownership, local legal consultation, and steering approval

The fictional decision matrix explicitly requires these roles and approval steps.

[Return to the exercise, page 14](#)

D / Response choices

D1. Which response preserves momentum and governance?

D. Coordinate the required reviews and decision request

This choice advances the proposal while respecting the supplied approval route.

[Return to the exercise, page 18](#)

D2. Which statement accurately describes Leo's role?

B. He coordinates the proposal without approving it

The case explicitly gives Leo coordination responsibility but not approval authority.

[Return to the exercise, page 18](#)

02 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: Senior supporter accountable for the initiative under the defined role. Which term fits?

A. executive sponsor

A Correct. executive sponsor: Senior supporter accountable for the initiative under the defined role. The usual combination is "brief the executive sponsor".

B Not here. working assumption: Provisional premise used while information is incomplete. The usual combination is "challenge a working assumption".

C Not here. informed stakeholder: Person kept updated without necessarily making the decision. The usual combination is "notify informed stakeholders".

D Not here. change request: Formal proposal to alter an agreed scope, process, or plan. The usual combination is "submit a change request".

[Return to the exercise, page 18](#)

D4. Rebuild the exchange from "Sponsor support is not process-change authorization". Priya: "Finance needs to assess collection risk and how the proposed terms affect the current customer process." Leo: [missing response] Priya: "Local legal counsel also needs to check the actual customer arrangements before we assume the global wording can be used unchanged." Which response belongs in the gap?

D. Yes. Finance is the process owner under this matrix, rather than merely a team we inform after implementation.

A Not here. This line belongs to turn 4, after Priya says: "The sponsor is senior, so I assumed the positive reaction replaced the remaining steps." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 18, after Priya says: "Once the committee decides, we should record exactly what was approved and any conditions, rather than only marking the slide green." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 8, after Priya says: "Local legal counsel also needs to check the actual customer arrangements before we assume the global wording can be used unchanged." It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Leo's response in turn 6. It connects Priya's preceding point with Priya's follow-up. The process owner has the defined accountability for the affected operation and must be involved rather than bypassed by a workstream preference.

[Return to the exercise, page 18](#)

E / Conversation

1. decision rights

Turn 2. Decision rights identify who can authorize the actual process change, which is not established solely by a sponsor's favorable reaction.

02 / Answers and explanations / continued

2. executive sponsor

Turn 4. The executive sponsor supports the initiative under the defined role but does not automatically override every specific approval route in the supplied governance.

3. process owner

Turn 6. The process owner has the defined accountability for the affected operation and must be involved rather than bypassed by a workstream preference.

4. consulted stakeholder

Turn 8. A consulted stakeholder supplies the specified input before the decision, which is distinct from merely receiving a notice afterward.

5. change request

Turn 10. The change request records the proposed alteration for review and decision; preparing it does not itself approve the change.

6. approval gate

Turn 12. The approval gate requires the stated authorization before implementation and should receive a specific decision-ready proposal.

7. escalation path

Turn 14. The escalation path raises a delayed issue to the appropriate authority without converting silence into approval or bypassing the process.

8. cross-functional dependency

Turn 16. The cross-functional dependency links sales implementation with finance and legal review, so separate unilateral instructions could create an inconsistent process.

9. decision log

Turn 18. The decision log preserves the actual decision, authority, and conditions instead of replacing them with a color or an anticipated outcome.

10. delegated authority

Turn 20. Delegated authority is the specific power actually granted, which must not be inferred from coordinating a proposal or receiving an encouraging response.

[Return to the conversation, page 20](#)

02 / Answers and explanations / continued

F / Accuracy and scope

F1. What belongs in a decision log?

A. Actual decision, authority, rationale, and conditions

A decision record needs the actual outcome and its limits rather than shorthand that invents authorization.

[Return to the exercise, page 22](#)

F2. What should happen if a required decision is delayed?

B. Use the stated escalation path

Delay should be addressed through the agreed governance, not converted into permission.

[Return to the exercise, page 22](#)

F / Guided speaking

1. comments

Lead: Legal has provided comments.

Turn 1. The supplied event is consultation input, not the steering decision.

2. outstanding

Consultant: Steering approval remains outstanding.

Turn 2. The required decision has not yet occurred in the case.

3. authority

Lead: The status label overstated the authority.

Turn 3. It treated a consulted role's input as the approval assigned elsewhere.

4. record

Consultant: Correct the decision record.

Turn 4. The record should preserve the actual input and unresolved approval status.

[Return to the conversation, page 23](#)

02 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "Sponsor support is not process-change authorization". Priya: "If a reviewer does not respond quickly, sales still needs a way to raise the timing risk." Leo: [missing response] Priya: "The sales and finance leads should not send conflicting instructions to the US team while the decision remains open." Which response belongs in the gap?

A. Use the agreed escalation path. We can escalate the delay without treating silence as consent.

A Correct. This is Leo's response in turn 14. It connects Priya's preceding point with Priya's follow-up. The escalation path raises a delayed issue to the appropriate authority without converting silence into approval or bypassing the process.

B Not here. This line belongs to turn 4, after Priya says: "The sponsor is senior, so I assumed the positive reaction replaced the remaining steps." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 6, after Priya says: "Finance needs to assess collection risk and how the proposed terms affect the current customer process." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 16, after Priya says: "The sales and finance leads should not send conflicting instructions to the US team while the decision remains open." It addresses that point, not the missing turn in the supplied exchange.

[Return to the exercise, page 23](#)

03 / Answers and explanations

A / Read the situation

A1. What concrete constraint does Jordan identify?

B. Quality approval is outstanding

The brief identifies an uncompleted quality approval as the reason the Tuesday plan is challenged.

[Return to the exercise, page 26](#)

A2. What is not established by the direct objection?

C. Hostile intent toward headquarters

The case explicitly does not establish hostility from the direct wording.

[Return to the exercise, page 26](#)

A3. What should the team make explicit?

B. The concern, decision status, and discussion boundary

The task requires a shared understanding of the issue and respectful challenge, not assumptions about silence or identity.

[Return to the exercise, page 26](#)

D / Response choices

D1. Which response best clarifies the objection?

C. Is the issue the Tuesday date or the integration goal?

This response checks the meaning without stereotyping or ignoring the stated constraint.

[Return to the exercise, page 30](#)

D2. Which sentence protects the discussion boundary?

B. Challenge the plan with evidence, not the people

Task-focused challenge can be firm while personal attacks remain outside the agreed conduct boundary.

[Return to the exercise, page 30](#)

03 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: Ability to raise questions or concerns without inappropriate interpersonal punishment. Which term fits?

C. psychological safety

A Not here. explicit agreement: Clearly stated acceptance rather than inferred assent. The usual combination is "obtain explicit agreement".

B Not here. working assumption: Provisional premise used while information is incomplete. The usual combination is "challenge a working assumption".

C Correct. psychological safety: Ability to raise questions or concerns without inappropriate interpersonal punishment. The usual combination is "support psychological safety".

D Not here. disagreement boundary: Limit separating legitimate challenge from personal attack or misconduct. The usual combination is "state the disagreement boundary".

[Return to the exercise, page 30](#)

D4. Rebuild the exchange from "That timeline will not work is a request to test the plan". Jordan: "In our previous meetings, we tested proposals aloud. A strong objection to a plan was not meant as an attack on its author." Lina: [missing response] Jordan: "We can adapt without making people hide a real blocker. I would rather explain the approval gap than let the schedule fail." Which response belongs in the gap?

B. Our earlier working norm was to resolve most objections before the meeting, so the same wording landed differently for me.

A Not here. This line belongs to turn 8, after Jordan says: "We can adapt without making people hide a real blocker. I would rather explain the approval gap than let the schedule fail." It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Lina's response in turn 6. It connects Jordan's preceding point with Jordan's follow-up. A working norm describes a team's actual meeting practice and should not be generalized into a fixed national personality.

C Not here. This line belongs to turn 18, after Jordan says: "We also use ready differently. Sales means the supplier is willing, while quality means the required approval is complete." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 4, after Jordan says: "The date is the problem. I support the change, but the local quality team has not approved the supplier transition." It addresses that point, not the missing turn in the supplied exchange.

[Return to the exercise, page 30](#)

E / Conversation

1. constructive dissent

Turn 2. Constructive dissent challenges the feasibility or reasoning of a proposal to improve the decision, rather than automatically rejecting the integration goal.

03 / Answers and explanations / continued

2. local constraint

Turn 4. The local constraint is the outstanding quality approval that limits the proposed cutover, not a general unwillingness to cooperate.

3. working norm

Turn 6. A working norm describes a team's actual meeting practice and should not be generalized into a fixed national personality.

4. challenge protocol

Turn 8. A challenge protocol sets a practical way to state the concern, evidence, and decision needed while preserving room for firm disagreement.

5. disagreement boundary

Turn 10. The disagreement boundary permits evidence-based challenge while excluding personal attacks or other inappropriate conduct.

6. repair statement

Turn 12. A repair statement corrects a misunderstanding and acknowledges its impact without requiring either person to abandon the substantive issue.

7. explicit agreement

Turn 14. Explicit agreement makes the actual acceptance or remaining objection clear instead of inferring consent from silence.

8. pre-read

Turn 16. A pre-read gives participants the relevant information before the meeting and can reduce misunderstandings about the proposal and unresolved conditions.

9. shared vocabulary

Turn 18. A shared vocabulary gives recurring status terms agreed meanings so different functions do not report incompatible states under the same word.

10. meeting closeout

Turn 20. The meeting closeout confirms actual decisions and open issues, here resolving the approval gap rather than authorizing an unconditional Tuesday cutover.

[Return to the conversation, page 32](#)

03 / Answers and explanations / continued

F / Accuracy and scope

F1. What should replace inferred consent?

C. A clear statement of agreement or remaining objection

Explicit responses make the actual agreement visible rather than relying on ambiguous silence.

[Return to the exercise, page 34](#)

F2. Which closeout matches the facts?

B. Resolve quality approval before deciding the cutover

The actual unresolved approval must remain part of the cutover decision.

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F / Guided speaking

1. approval

Consultant: Silence does not establish approval.

Turn 1. The case supplies no explicit decision or required authorization.

2. check

Lead: We need an explicit alignment check.

Turn 2. A direct check can establish the participants' actual positions and unresolved concerns.

3. stated

Consultant: Any remaining objection should be stated.

Turn 3. The team needs clear concerns rather than an assumption based on silence.

4. open

Lead: The decision remains open.

Turn 4. The required approval has not occurred in the supplied situation.

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03 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "That timeline will not work is a request to test the plan". Jordan: "Some colleagues stayed silent after the first discussion. We should not assume that means they accepted the date." Lina: [missing response] Jordan: "A short note before the next meeting could identify the pending approval, its owner, and the evidence needed to resolve it." Which response belongs in the gap?

B. Correct. We need explicit agreement on the next action and the eventual decision, using the actual approval process.

A Not here. This line belongs to turn 16, after Jordan says: "A short note before the next meeting could identify the pending approval, its owner, and the evidence needed to resolve it." It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Lina's response in turn 14. It connects Jordan's preceding point with Jordan's follow-up. Explicit agreement makes the actual acceptance or remaining objection clear instead of inferring consent from silence.

C Not here. This line belongs to turn 4, after Jordan says: "The date is the problem. I support the change, but the local quality team has not approved the supplier transition." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 6, after Jordan says: "In our previous meetings, we tested proposals aloud. A strong objection to a plan was not meant as an attack on its author." 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 change is proposed?

C. A role-title change

The brief identifies a proposed title change and leaves classification review incomplete.

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A2. Why is the spreadsheet assumption unsupported?

A. A job title alone does not determine exemption

The actual duties, compensation, and applicable requirements need review rather than a conclusion from the title.

[Return to the exercise, page 36](#)

A3. What process currently remains in place?

A. Existing approved time recording

The brief explicitly retains the current approved time-recording process.

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D / Response choices

D1. Which correction should be made to the spreadsheet?

D. Title mapping does not establish exempt status

The spreadsheet should separate the proposed title from the unresolved legal classification.

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D2. Which employee message is accurate?

C. No classification change is approved; follow current time recording

The case retains the current approved process and supplies no authorized classification change.

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04 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: Work genuinely performed in the role. Which term fits?

A. actual duties

A Correct. actual duties: Work genuinely performed in the role. The usual combination is "review actual duties".

B Not here. working assumption: Provisional premise used while information is incomplete. The usual combination is "challenge a working assumption".

C Not here. retention concern: Risk that employees may leave or disengage during transition. The usual combination is "address retention concerns".

D Not here. timekeeping: Recording work time under the applicable process. The usual combination is "maintain accurate timekeeping".

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D4. Rebuild the exchange from "A new title does not determine overtime status".

Ken: "What information does the proper review need before anyone changes the employee record or payroll setting?" Denise: [missing response] Ken: "Being paid a salary also should not be treated as a universal shortcut to an exemption conclusion." Which response belongs in the gap?

C. We need the actual duties, compensation information, and applicable requirements, assessed through the authorized HR and legal process.

A Not here. This line belongs to turn 4, after Ken says: "The title mapping was intended to align levels across the group, not to complete a legal assessment of each US role." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 16, after Ken says: "The local-law questions should go to the qualified advisers rather than be answered from a general headquarters presentation." It addresses that point, not the missing turn in the supplied exchange.

C Correct. This is Denise's response in turn 6. It connects Ken's preceding point with Ken's follow-up. Actual duties describe the work genuinely performed and are relevant to the qualified classification assessment rather than relying only on a title or generic template.

D Not here. This line belongs to turn 8, after Ken says: "Being paid a salary also should not be treated as a universal shortcut to an exemption conclusion." It addresses that point, not the missing turn in the supplied exchange.

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E / Conversation

1. job title

Turn 2. A job title is an organizational label and does not by itself establish exemption from applicable overtime requirements.

04 / Answers and explanations / continued

2. job architecture

Turn 4. Job architecture organizes roles and levels but must remain distinct from the legal assessment of pay classification.

3. actual duties

Turn 6. Actual duties describe the work genuinely performed and are relevant to the qualified classification assessment rather than relying only on a title or generic template.

4. salary basis

Turn 8. Salary basis is one potentially relevant compensation concept under applicable tests and does not replace the full requirements for a particular exemption.

5. exempt classification

Turn 10. Exempt classification is a legal status requiring the applicable assessment, which has not been completed or approved in the supplied case.

6. timekeeping

Turn 12. Timekeeping remains on the existing approved process in the case and should not be stopped based on an unapproved title or classification assumption.

7. Policy harmonization

Turn 14. Policy harmonization coordinates workplace arrangements while retaining the local requirements and actual review needed for each proposed change.

8. Local-law review

Turn 16. Local-law review assesses the actual jurisdiction-specific requirements and cannot be replaced by a global title convention or general presentation.

9. employee communication

Turn 18. Employee communication should state verified current status and the actual process rather than promise an unknown future or announce an unapproved change.

10. personnel data

Turn 20. Personnel data requires appropriate access and privacy handling even after acquisition; common ownership does not imply unrestricted distribution.

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04 / Answers and explanations / continued

F / Accuracy and scope

F1. What should HR examine?

A. Actual role facts and applicable requirements

Classification depends on the relevant facts and legal requirements rather than a naming preference.

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F2. How should personnel records be shared?

B. Through the authorized access and privacy process

Employee information still requires appropriate authority, controls, and applicable privacy handling.

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F / Guided speaking

1. title

Employee: The chart shows a proposed title.

Turn 1. The chart changes the organizational label without deciding payroll classification.

2. incomplete

HR: The classification review remains incomplete.

Turn 2. The scenario supplies no completed classification assessment or approval.

3. process

Employee: I should continue the approved timekeeping process.

Turn 3. The current approved recording instructions remain in effect.

4. authorization

HR: An actual change needs the required authorization.

Turn 4. A proposed chart does not itself authorize a payroll or classification change.

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04 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "A new title does not determine overtime status". Ken: "We also have different leave and benefits arrangements across the two organizations. The global template does not resolve those differences." Denise: [missing response] Ken: "The local-law questions should go to the qualified advisers rather than be answered from a general headquarters presentation." Which response belongs in the gap?

B. Policy harmonization needs its own review, including relevant local requirements and any consultation or approval obligations.

A Not here. This line belongs to turn 12, after Ken says: "Employees have asked whether they should stop using the current time-recording process once the new organization chart appears." It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Denise's response in turn 14. It connects Ken's preceding point with Ken's follow-up. Policy harmonization coordinates workplace arrangements while retaining the local requirements and actual review needed for each proposed change.

C Not here. This line belongs to turn 4, after Ken says: "The title mapping was intended to align levels across the group, not to complete a legal assessment of each US role." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 2, after Ken says: "The global role map changes operations coordinator to operations manager. The spreadsheet automatically labels the new title exempt." 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. Which test has passed?

A. Employee login to the new identity platform

The brief identifies a successful login test but leaves the invoice job unverified.

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A2. What dependency remains?

B. The invoice job uses a legacy service account

The scheduled job still depends on a legacy service identity.

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A3. Which action is not approved?

A. Broad shared-administrator access as a workaround

The case explicitly excludes broad shared-administrator access as an approved workaround.

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D / Response choices

D1. Which sponsor update is accurate?

B. Login passed; invoice posting remains dependent on the legacy account

The supplied tests establish only login success while a business-process dependency remains.

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D2. What should an acceptance check include here?

D. The invoice job's end-to-end result and reconciliation

The relevant business workflow must be tested beyond authentication and its outputs checked.

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05 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: Authentication arrangement allowing access across approved services. Which term fits?

B. single sign-on

A Not here. working assumption: Provisional premise used while information is incomplete. The usual combination is "challenge a working assumption".

B Correct. single sign-on: Authentication arrangement allowing access across approved services. The usual combination is "test single sign-on".

C Not here. legacy dependency: Reliance on a component of the earlier setup. The usual combination is "identify the legacy dependency".

D Not here. end-to-end test: Test covering the relevant full process across connected components. The usual combination is "run an end-to-end test".

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D4. Rebuild the exchange from "Successful login does not prove invoice posting works". Eric: "If we retire the old identity service before addressing it, the business impact could be failed invoice posting." Fatima: [missing response] Eric: "We need to test the actual invoice process from its start through the expected output, not just repeat the login test." Which response belongs in the gap?

D. That is the legacy dependency the sponsor needs to understand in operational terms.

A Not here. This line belongs to turn 8, after Eric says: "We need to test the actual invoice process from its start through the expected output, not just repeat the login test." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 18, after Eric says: "I will align the IT and finance updates so one does not say complete while the other still reports an untested process." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 2, after Eric says: "Employee login passed on the new platform. Can we tell the sponsor that the old identity service is ready to retire?" It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Fatima's response in turn 6. It connects Eric's preceding point with Eric's follow-up. The legacy dependency is the job's reliance on the earlier identity setup, which must be addressed before assuming retirement is safe.

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E / Conversation

1. single sign-on

Turn 2. Single sign-on testing verifies the stated authentication flow but does not establish that every automated business process works.

05 / Answers and explanations / continued

2. service account

Turn 4. A service account is the identity used by the automated invoice job, whose dependency remains distinct from successful employee login.

3. legacy dependency

Turn 6. The legacy dependency is the job's reliance on the earlier identity setup, which must be addressed before assuming retirement is safe.

4. end-to-end test

Turn 8. An end-to-end test covers the full relevant workflow across connected components, including the automated posting process.

5. reconciliation

Turn 10. Reconciliation compares expected and resulting records or totals to establish whether the business process produced the required output.

6. least privilege

Turn 12. Least privilege limits access to the authorized task and is not satisfied by broadly sharing an unrestricted administrator identity.

7. go/no-go decision

Turn 14. The go/no-go decision is the explicit authorization based on readiness and controls, not a permission created by a calendar booking.

8. rollback plan

Turn 16. The rollback plan defines the authorized return to a workable prior state, including the relevant ownership and conditions.

9. User acceptance testing

Turn 18. User acceptance testing verifies business requirements through the relevant users and process, complementing technical component tests rather than being replaced by them.

10. data integrity

Turn 20. Data integrity concerns the accuracy and consistency of the resulting information and must remain a cutover requirement alongside availability and access controls.

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05 / Answers and explanations / continued

F / Accuracy and scope

F1. Which response preserves control?

C. Resolve access through the authorized least-privilege process

A legitimate fix needs appropriate access and review rather than a control bypass.

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F2. What is the status of the go-live decision?

B. Not supplied as approved

The case provides no authorization to proceed with the cutover or legacy retirement.

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F / Guided speaking

1. success

IT: The job reported success.

Turn 1. The technical status message reports completion, not verified correctness of every output.

2. reconcile

Finance: The totals do not reconcile.

Turn 2. The actual output and expected transactions differ in the supplied test.

3. confirmed

IT: Business acceptance is not yet confirmed.

Turn 3. The unresolved mismatch prevents claiming the supplied acceptance signoff is complete.

4. decision

Finance: Record the discrepancy before the go/no-go decision.

Turn 4. The readiness decision needs the actual unresolved test evidence.

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05 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "Successful login does not prove invoice posting works". Eric: "The cutover window is already in the calendar, but the remaining tests and approvals have not been completed." Fatima: [missing response] Eric: "We should also know what happens if the approved transition starts and the business checks fail." Which response belongs in the gap?

D. Then the go/no-go decision remains separate from the scheduled window. We must report the unresolved facts before that review.

A Not here. This line belongs to turn 4, after Eric says: "The finance workstream mentioned that invoice posting runs on a schedule rather than through a person signing in." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 16, after Eric says: "We should also know what happens if the approved transition starts and the business checks fail." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 2, after Eric says: "Employee login passed on the new platform. Can we tell the sponsor that the old identity service is ready to retire?" It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Fatima's response in turn 14. It connects Eric's preceding point with Eric's follow-up. The go/no-go decision is the explicit authorization based on readiness and controls, not a permission created by a calendar booking.

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06 / Answers and explanations

A / Read the situation

A1. Which entity remains the invoicing entity under the supplied plan?

B. The existing US subsidiary

The approved transition plan retains the existing US subsidiary for invoicing.

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A2. What is the approved payment-instruction status?

D. No change has been approved

The brief states that payment instructions have not changed under the approved plan.

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A3. How should the unexpected email be treated?

D. As an unverified request needing established-channel verification

A separate unexpected account-change request requires verification rather than trust based on branding.

[Return to the exercise, page 58](#)

D / Response choices

D1. Which customer statement matches the approved plan?

A. The existing US entity and payment instructions remain in use

The approved transition plan explicitly retains the existing entity and payment process.

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D2. Which verification route is appropriate?

B. Independently established trusted contact details

Independent verification avoids relying on information supplied by the unverified request itself.

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06 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: Change in external name or visual presentation. Which term fits?

B. brand transition

A Not here. working assumption: Provisional premise used while information is incomplete. The usual combination is "challenge a working assumption".

B Correct. brand transition: Change in external name or visual presentation. The usual combination is "coordinate the brand transition".

C Not here. customer-facing notice: Communication intended for customers. The usual combination is "approve customer-facing notices".

D Not here. vendor master: Customer or company record containing supplier details. The usual combination is "control vendor-master changes".

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D4. Rebuild the exchange from "New ownership does not rewrite every invoice instruction". Sofia: "Their contract names that subsidiary too, but any actual transfer question needs the appropriate legal review." Daniel: [missing response] Sofia: "For the bank-account email, we should verify through the contact route already established in the relationship." Which response belongs in the gap?

C. Correct. The contracting entity and its obligations should be described from the actual records, not a simplified group label.

A Not here. This line belongs to turn 2, after Sofia says: "A customer received our new logo announcement and then an email asking them to pay a different bank account. They assume both are part of integration." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 12, after Sofia says: "The logo and correct account-manager name make the email look convincing, but those details do not establish that it is genuine." It addresses that point, not the missing turn in the supplied exchange.

C Correct. This is Daniel's response in turn 6. It connects Sofia's preceding point with Sofia's follow-up. The contracting entity is the legal party to the agreement, which must be distinguished from a brand or parent company.

D Not here. This line belongs to turn 18, after Sofia says: "I will coordinate the account response with finance and the authorized security or fraud-reporting contact, preserving the message as required." It addresses that point, not the missing turn in the supplied exchange.

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E / Conversation

1. brand transition

Turn 2. The brand transition changes presentation and does not itself authorize a new payment destination or legal entity.

06 / Answers and explanations / continued

2. invoicing entity

Turn 4. The invoicing entity remains the existing US subsidiary in this case and should not be replaced merely because ownership or branding changed.

3. contracting entity

Turn 6. The contracting entity is the legal party to the agreement, which must be distinguished from a brand or parent company.

4. independent verification

Turn 8. Independent verification checks the request through a trusted source separate from the unverified message rather than allowing the sender to authenticate itself.

5. Payment redirection

Turn 10. Payment redirection changes where funds are sent and requires the actual authorization and control process, not an improvised response to conflicting emails.

6. business email compromise

Turn 12. Business email compromise can involve convincing business details, so a familiar logo or name does not prove a payment-change request is authentic.

7. vendor master

Turn 14. The vendor master contains supplier particulars, and changes to it should use verified approved information rather than assumptions from a new brand announcement.

8. customer continuity

Turn 16. Customer continuity maintains the verified service and payment process while the team resolves the unexpected request through the proper controls.

9. customer-facing notice

Turn 18. The customer-facing notice must use approved facts so separate teams do not send contradictory statements about identity, payment, or service.

10. commercial continuity plan

Turn 20. The commercial continuity plan states the approved customer-facing arrangement and should distinguish current continuity from future changes requiring separate authorization.

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06 / Answers and explanations / continued

F / Accuracy and scope

F1. What must be reviewed separately from branding?

A. Actual contract and invoicing-entity changes

Branding does not determine the legal or operational status of the customer arrangements.

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F2. What should the team avoid?

C. Sending unapproved replacement payment instructions

A new instruction must not be improvised while the actual request is unverified.

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F / Guided speaking

1. sender

Lead: The reply came from the same sender.

Turn 1. The confirmation repeats the unverified source rather than adding an independent basis.

2. verification

Consultant: That is not independent verification.

Turn 2. The request has not been checked through a trusted separate channel.

3. contact

Lead: We need an established trusted contact.

Turn 3. The verification should use a previously reliable independent contact route.

4. unverified

Consultant: The payment change remains unverified.

Turn 4. The supplied reply does not establish authorization or authenticity of the new instructions.

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06 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "New ownership does not rewrite every invoice instruction". Sofia: "The customer may also need to update its supplier record, but we should give only approved entity information." Daniel: [missing response] Sofia: "Our immediate response can explain that the existing approved payment instructions remain in place while the unexpected request is checked." Which response belongs in the gap?

A. Exactly. Any vendor master change should follow the customer's and our actual verification requirements.

A Correct. This is Daniel's response in turn 14. It connects Sofia's preceding point with Sofia's follow-up. The vendor master contains supplier particulars, and changes to it should use verified approved information rather than assumptions from a new brand announcement.

B Not here. This line belongs to turn 2, after Sofia says: "A customer received our new logo announcement and then an email asking them to pay a different bank account. They assume both are part of integration." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 16, after Sofia says: "Our immediate response can explain that the existing approved payment instructions remain in place while the unexpected request is checked." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 8, after Sofia says: "For the bank-account email, we should verify through the contact route already established in the relationship." 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. What is the gross realized saving for the three months?

C. USD 150,000

Three months at fifty thousand per month gives one hundred fifty thousand realized gross savings.

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A2. What is the net realized benefit on the supplied basis?

B. USD 60,000

Subtracting the ninety-thousand integration cost from one hundred fifty thousand gives sixty thousand.

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A3. Why must the two workstream reports be reconciled?

B. They list the same saving

The same underlying saving appears in both reports and must not be counted twice.

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D / Response choices

D1. Which headline is accurate?

D. 600,000 annualized run rate; 60,000 net realized in the stated period

This statement distinguishes the normalized rate from the actual net period result.

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D2. What is the double-counting correction?

D. Record the underlying benefit once while acknowledging both teams

Shared contributions do not create two separate economic benefits.

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07 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: Benefit after the specified costs on the defined basis. Which term fits?

D. net benefit

A Not here. dis-synergy: Adverse cost or revenue effect associated with integration. The usual combination is "identify dis-synergies".

B Not here. realization date: Date from which a benefit is treated as achieved under the methodology. The usual combination is "verify the realization date".

C Not here. working assumption: Provisional premise used while information is incomplete. The usual combination is "challenge a working assumption".

D Correct. net benefit: Benefit after the specified costs on the defined basis. The usual combination is "reconcile the net benefit".

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D4. Rebuild the exchange from "Annual run rate is not money already realized".

Oscar: "The one-time implementation expense was ninety thousand in the same period, and the report uses the stated cash basis." **Nina:** [missing response] **Oscar:** "The net realized benefit is therefore sixty thousand, even though the monthly saving could continue beyond this quarter." **Which response belongs in the gap?**

D. Then include the one-time integration cost rather than letting the headline imply the change was free to deliver.

A Not here. This line belongs to turn 20, after Oscar says: "The revised headline will acknowledge the ongoing opportunity without saying that a full year's saving has already been achieved." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 12, after Oscar says: "We can assign one shared record to the saving and show IT and procurement as contributors." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 14, after Oscar says: "We should also identify the reference cost we compared against, so the saving is not based on an unexplained estimate." It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Nina's response in turn 6. It connects Oscar's preceding point with Oscar's follow-up. The one-time integration cost is the ninety-thousand expense assigned to the same period and basis, which must be included in the supplied net calculation.

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E / Conversation

1. run-rate saving

Turn 2. Run-rate saving extends the stated monthly rate over a year and must not be reported as benefit already realized in only three months.

07 / Answers and explanations / continued

2. in-period realization

Turn 4. In-period realization identifies the benefit actually achieved during the three completed months, not the annualized extrapolation.

3. one-time integration cost

Turn 6. The one-time integration cost is the ninety-thousand expense assigned to the same period and basis, which must be included in the supplied net calculation.

4. net benefit

Turn 8. Net benefit subtracts the specified ninety-thousand cost from one hundred fifty thousand of gross realization, yielding sixty thousand here.

5. double counting

Turn 10. Double counting would record the same underlying vendor saving twice merely because two workstreams contributed to it.

6. benefit register

Turn 12. The benefit register records the unique underlying benefit, its contributors, owner, assumptions, and reporting status.

7. baseline

Turn 14. The baseline is the reference against which the reduction is measured and must be stated to make the saving interpretable.

8. Cost avoidance

Turn 16. Cost avoidance concerns preventing a prospective expense and may differ from reducing an existing baseline cost, so the methodology must distinguish them.

9. benefit bridge

Turn 18. The benefit bridge reconciles the stated basis and gross effects to the net result rather than presenting unrelated figures as interchangeable.

10. finance validation

Turn 20. Finance validation checks the figures, attribution, and methodology before the result is treated as an approved benefit report.

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07 / Answers and explanations / continued

F / Accuracy and scope

F1. Which item is needed to interpret savings?

B. The agreed baseline and reporting basis

The baseline and basis determine what the reported change actually measures.

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F2. What does the annual run rate assume?

D. Continuation of the stated monthly rate for annualization

Annualization extends the current rate arithmetically and does not prove a realized or guaranteed future year.

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F / Guided speaking

1. forecast

Lead: The amount is currently a forecast.

Turn 1. The figure concerns a future proposed change, not an achieved result.

2. outstanding

Finance: The required approval remains outstanding.

Turn 2. The scenario says the change has not yet been approved.

3. realized

Lead: No benefit has been realized.

Turn 3. No implementation or actual saving has occurred in the supplied case.

4. total

Finance: Keep it out of the realized-benefit total.

Turn 4. A future forecast should not be counted as an already achieved benefit.

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07 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "Annual run rate is not money already realized". Oscar: "We should also identify the reference cost we compared against, so the saving is not based on an unexplained estimate." Nina: [missing response] Oscar: "If a planned future expense never occurs, should we record that in the same way as this reduction in an existing cost?" Which response belongs in the gap?

B. Yes. The agreed baseline and any adjustments need to be traceable rather than reconstructed after the result is announced.

A Not here. This line belongs to turn 20, after Oscar says: "The revised headline will acknowledge the ongoing opportunity without saying that a full year's saving has already been achieved." It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Nina's response in turn 14. It connects Oscar's preceding point with Oscar's follow-up. The baseline is the reference against which the reduction is measured and must be stated to make the saving interpretable.

C Not here. This line belongs to turn 12, after Oscar says: "We can assign one shared record to the saving and show IT and procurement as contributors." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 6, after Oscar says: "The one-time implementation expense was ninety thousand in the same period, and the report uses the stated cash basis." 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. How many stable days are required by this fictional plan?

A. Five consecutive days

The supplied acceptance criterion requires five consecutive stable operating days.

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A2. What is the reporting defect's status?

A. Open with a named finance owner

Assigning an owner does not establish that the defect has been fixed.

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A3. Why is immediate acceptance unsupported?

D. Only two of the required five stable days are complete

The stated acceptance condition remains unmet after only two stable days.

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D / Response choices

D1. Which status report is accurate?

C. Two stable days complete; acceptance condition unmet

This choice preserves the actual operating evidence and the unmet criterion.

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D2. What should happen to the defect at handover?

A. Retain its status, owner, next action, and review route

An unresolved item needs traceable ownership and follow-up rather than disappearance from the record.

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08 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: Authorized confirmation of operational readiness or acceptance. Which term fits?

C. operational signoff

A Not here. ownership transfer: Explicit handover of responsibility to the receiving role. The usual combination is "document ownership transfer".

B Not here. defect backlog: Record of unresolved defects and their status. The usual combination is "maintain the defect backlog".

C Correct. operational signoff: Authorized confirmation of operational readiness or acceptance. The usual combination is "secure operational signoff".

D Not here. working assumption: Provisional premise used while information is incomplete. The usual combination is "challenge a working assumption".

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D4. Rebuild the exchange from "An assigned issue is not a resolved issue". Morgan: "The finance lead has accepted responsibility for the report. Does that at least mean we can mark the defect closed?" Arjun: [missing response] Morgan: "The receiving team also needs to know how the new process works and whom to contact when something fails." Which response belongs in the gap?

D. No. The defect backlog should show it as open with an owner, next action, and review route.

A Not here. This line belongs to turn 4, after Morgan says: "I do not want the integration team to remain indefinitely just because one minor report still needs attention." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 18, after Morgan says: "I will tell the sponsor group that handover preparation is progressing, but the operating evidence does not yet meet the criterion." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 2, after Morgan says: "The process has worked for two days, and finance owns the remaining reporting issue. Can we close the workstream today?" It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Arjun's response in turn 6. It connects Morgan's preceding point with Morgan's follow-up. The defect backlog records unresolved problems, and assigning an owner does not establish that the underlying defect has been fixed.

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E / Conversation

1. acceptance criteria

Turn 2. The acceptance criteria require five consecutive stable days in this fictional plan, so two days do not establish completion.

08 / Answers and explanations / continued

2. service acceptance

Turn 4. Service acceptance is the actual authorized acceptance of the operation under the stated conditions, not a synonym for preparing to hand over.

3. defect backlog

Turn 6. The defect backlog records unresolved problems, and assigning an owner does not establish that the underlying defect has been fixed.

4. knowledge transfer

Turn 8. Knowledge transfer builds the receiving team's practical understanding and capability, rather than merely sending a document or naming a department.

5. runbook

Turn 10. The runbook must contain usable operational instructions and current responsibilities, not an escalation route that disappears after transition.

6. Support coverage

Turn 12. Support coverage defines when and how assistance is available, which must be agreed rather than inherited by assumption from the temporary project team.

7. Ownership transfer

Turn 14. Ownership transfer is an explicit handover of responsibility to the receiving role and should not be inferred solely from preparing documents.

8. open risk

Turn 16. An open risk remains an unresolved exposure and must be recorded even when an authorized decision accepts or transfers responsibility for it.

9. closure report

Turn 18. The closure report records completed scope, remaining obligations, and actual closure authority rather than implying that preparation equals completion.

10. post-integration review

Turn 20. The post-integration review evaluates outcomes after transition and remains distinct from administrative closure of the workstream.

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08 / Answers and explanations / continued

F / Accuracy and scope

F1. What should knowledge transfer establish?

B. The receiving team's practical ability to operate the process

Knowledge transfer should support actual operational capability, not just document transmission.

[Return to the exercise, page 88](#)

F2. What is required for an exception to the criterion?

C. The actual specified exception authority and process

A stated condition cannot be silently waived without the relevant authorization.

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F / Guided speaking

1. sent

Consultant: The document has been sent.

Turn 1. Email delivery is the completed action supplied in the scenario.

2. pending

Operator: Our practical review is still pending.

Turn 2. The receiving team has not yet checked the material or contacts.

3. accepted

Consultant: Responsibility has not been formally accepted.

Turn 3. No receiving-team acceptance is supplied by the document email alone.

4. transfer

Operator: We need a usable handover, not only a file transfer.

Turn 4. Moving a file does not establish operational understanding or ownership.

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08 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "An assigned issue is not a resolved issue". Morgan: "Could we say the handover is prepared while leaving acceptance pending until the stated conditions are met?" Arjun: [missing response] Morgan: "If leadership wants an exception to the five-day condition, it should be a visible decision through the specified authority." Which response belongs in the gap?

A. That is accurate. Ownership transfer still needs the receiving role's actual acceptance and the required record.

A Correct. This is Arjun's response in turn 14. It connects Morgan's preceding point with Morgan's follow-up. Ownership transfer is an explicit handover of responsibility to the receiving role and should not be inferred solely from preparing documents.

B Not here. This line belongs to turn 4, after Morgan says: "I do not want the integration team to remain indefinitely just because one minor report still needs attention." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 10, after Morgan says: "We have a draft procedure, but the escalation contact still points to a consultant who leaves next week." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 2, after Morgan says: "The process has worked for two days, and finance owns the remaining reporting issue. Can we close the workstream today?" 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: Ability to sustain required operations through change or disruption. Which term fits?

C. business continuity

A Not here. continuity owner: Person accountable for keeping a specified operation functioning. The usual combination is "name the continuity owner".

B Not here. transition service agreement: Contract for specified temporary support during a transition. The usual combination is "review the transition service agreement".

C Correct. business continuity: Ability to sustain required operations through change or disruption. The usual combination is "protect business continuity".

D Not here. source attribution: Identification of where information came from. The usual combination is "preserve source attribution".

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2. A colleague needs the term for this meaning: Person whose input is sought under the stated process. Which term fits?

A. consulted stakeholder

A Correct. consulted stakeholder: Person whose input is sought under the stated process. The usual combination is "involve consulted stakeholders".

B Not here. issue log: Record of current problems needing resolution. The usual combination is "maintain the issue log".

C Not here. decision rights: Defined authority over specified decisions. The usual combination is "clarify decision rights".

D Not here. clarification request: Question that resolves an unclear meaning or instruction. The usual combination is "make a targeted clarification request".

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Review 1 / Explanations / continued

3. Rebuild the exchange from "The deal closed; the payroll process did not move overnight". Aya: "The later migration still matters, but we need to identify the testing, data, access, and approval work before scheduling it." Marcus: [missing response] Aya: "Who should coordinate those items across HR, IT, finance, and the local business without taking over every operational decision?" Which response belongs in the gap?

C. Put those items in the dependency map so the schedule reflects what actually has to happen first.

A Not here. This line belongs to turn 18, after Aya says: "Before the later migration, we can review the actual evidence that the required tests and authorizations are complete." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 6, after Aya says: "Payroll currently runs through the existing approved process. No one has authorized moving it to the new platform this week." It addresses that point, not the missing turn in the supplied exchange.

C Correct. This is Marcus's response in turn 10. It connects Aya's preceding point with Aya's follow-up. A dependency identifies a prerequisite for the later migration and prevents the task from being scheduled as though readiness already exists.

D Not here. This line belongs to turn 12, after Aya says: "Who should coordinate those items across HR, IT, finance, and the local business without taking over every operational decision?" It addresses that point, not the missing turn in the supplied exchange.

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Review 1 / Explanations / continued

4. Rebuild the exchange from "Sponsor support is not process-change authorization". Priya: "Once the committee decides, we should record exactly what was approved and any conditions, rather than only marking the slide green." Leo: [missing response] Priya: "I will tell sales that the concept is supported and the required review and approval are still outstanding." Which response belongs in the gap?

A. Put that in the decision log, along with the owner responsible for communicating and implementing the authorized change.

A Correct. This is Leo's response in turn 18. It connects Priya's preceding point with Priya's follow-up. The decision log preserves the actual decision, authority, and conditions instead of replacing them with a color or an anticipated outcome.

B Not here. This line belongs to turn 8, after Priya says: "Local legal counsel also needs to check the actual customer arrangements before we assume the global wording can be used unchanged." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 6, after Priya says: "Finance needs to assess collection risk and how the proposed terms affect the current customer process." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 4, after Priya says: "The sponsor is senior, so I assumed the positive reaction replaced the remaining steps." It addresses that point, not the missing turn in the supplied exchange.

[Return to the exercise, page 24](#)

Review 2 / Explanations

Cumulative review

1. A colleague needs the term for this meaning: Reasoned disagreement intended to improve a decision. Which term fits?

A. constructive dissent

A Correct. constructive dissent: Reasoned disagreement intended to improve a decision. The usual combination is "invite constructive dissent".

B Not here. source attribution: Identification of where information came from. The usual combination is "preserve source attribution".

C Not here. decision norm: Shared expectation for how agreement and decisions are established. The usual combination is "clarify the decision norm".

D Not here. pre-read: Material circulated before a meeting for preparation. The usual combination is "circulate a focused pre-read".

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2. A colleague needs the term for this meaning: Entitlement under the actual applicable pay requirements. Which term fits?

B. overtime eligibility

A Not here. clarification request: Question that resolves an unclear meaning or instruction. The usual combination is "make a targeted clarification request".

B Correct. overtime eligibility: Entitlement under the actual applicable pay requirements. The usual combination is "assess overtime eligibility".

C Not here. job architecture: Framework organizing roles, levels, and titles. The usual combination is "align job architecture".

D Not here. paid time off: Leave entitlement or policy under the actual applicable terms. The usual combination is "clarify paid-time-off arrangements".

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Review 2 / Explanations / continued

3. Rebuild the exchange from "Sponsor support is not process-change authorization". Priya: "What can you decide as the integration consultant, and what needs to stay with the functional and steering roles?" Leo: [missing response] Priya: "We need a clear request with the proposed scope, affected customers, risks, and the question the committee must answer." Which response belongs in the gap?

B. I can coordinate the change request, assemble the dependencies, and track the decision. I cannot approve this process change myself.

A Not here. This line belongs to turn 20, after Priya says: "I will tell sales that the concept is supported and the required review and approval are still outstanding." It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Leo's response in turn 10. It connects Priya's preceding point with Priya's follow-up. The change request records the proposed alteration for review and decision; preparing it does not itself approve the change.

C Not here. This line belongs to turn 8, after Priya says: "Local legal counsel also needs to check the actual customer arrangements before we assume the global wording can be used unchanged." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 2, after Priya says: "The sponsor liked our standard credit-terms proposal. Sales wants to start using it in the US business tomorrow." It addresses that point, not the missing turn in the supplied exchange.

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4. Rebuild the exchange from "A new title does not determine overtime status". Ken: "Some employees want reassurance that nothing about their work or benefits will ever change. I do not have authority to promise that." Denise: [missing response] Ken: "I will also make sure the role records and compensation details are shared only with the people authorized for the review." Which response belongs in the gap?

A. Give an accurate employee communication: no change is approved at present, and actual decisions will be communicated through the authorized process.

A Correct. This is Denise's response in turn 18. It connects Ken's preceding point with Ken's follow-up. Employee communication should state verified current status and the actual process rather than promise an unknown future or announce an unapproved change.

B Not here. This line belongs to turn 10, after Ken says: "I will remove the automatic conclusion and mark the classification field as awaiting the required review." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 8, after Ken says: "Being paid a salary also should not be treated as a universal shortcut to an exemption conclusion." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 20, after Ken says: "I will also make sure the role records and compensation details are shared only with the people authorized for the review." 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: Service managing authentication identity under the actual architecture. Which term fits?

B. identity provider

A Not here. change freeze: Defined restriction on changes during a sensitive period. The usual combination is "observe the change freeze".

B Correct. identity provider: Service managing authentication identity under the actual architecture. The usual combination is "verify identity-provider dependencies".

C Not here. source attribution: Identification of where information came from. The usual combination is "preserve source attribution".

D Not here. user acceptance testing: Business-user verification against agreed acceptance requirements. The usual combination is "complete user acceptance testing".

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2. A colleague needs the term for this meaning: Direction for making a payment. Which term fits?

B. remittance instruction

A Not here. customer continuity: Maintenance of customer service and obligations during transition. The usual combination is "protect customer continuity".

B Correct. remittance instruction: Direction for making a payment. The usual combination is "verify remittance instructions".

C Not here. clarification request: Question that resolves an unclear meaning or instruction. The usual combination is "make a targeted clarification request".

D Not here. service-level commitment: Stated obligation concerning the level of service. The usual combination is "preserve service-level commitments".

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Review 3 / Explanations / continued

3. Rebuild the exchange from "A new title does not determine overtime status". Ken: "I will remove the automatic conclusion and mark the classification field as awaiting the required review." Denise: [missing response] Ken: "Employees have asked whether they should stop using the current time-recording process once the new organization chart appears." Which response belongs in the gap?

A. Good. No exempt classification change has been approved here, and the title proposal should not be used as authorization to make one.

A Correct. This is Denise's response in turn 10. It connects Ken's preceding point with Ken's follow-up. Exempt classification is a legal status requiring the applicable assessment, which has not been completed or approved in the supplied case.

B Not here. This line belongs to turn 18, after Ken says: "Some employees want reassurance that nothing about their work or benefits will ever change. I do not have authority to promise that." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 20, after Ken says: "I will also make sure the role records and compensation details are shared only with the people authorized for the review." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 8, after Ken says: "Being paid a salary also should not be treated as a universal shortcut to an exemption conclusion." It addresses that point, not the missing turn in the supplied exchange.

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Review 3 / Explanations / continued

4. Rebuild the exchange from "New ownership does not rewrite every invoice instruction". Sofia: "I will coordinate the account response with finance and the authorized security or fraud-reporting contact, preserving the message as required." Daniel: [missing response] Sofia: "The account owner and support route remain clear, and any future approved change will use the actual notice and verification process." Which response belongs in the gap?

B. Also align the customer-facing notice so customers do not receive conflicting instructions from sales, finance, and the integration team.

A Not here. This line belongs to turn 12, after Sofia says: "The logo and correct account-manager name make the email look convincing, but those details do not establish that it is genuine." It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Daniel's response in turn 18. It connects Sofia's preceding point with Sofia's follow-up. The customer-facing notice must use approved facts so separate teams do not send contradictory statements about identity, payment, or service.

C Not here. This line belongs to turn 2, after Sofia says: "A customer received our new logo announcement and then an email asking them to pay a different bank account. They assume both are part of integration." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 6, after Sofia says: "Their contract names that subsidiary too, but any actual transfer question needs the appropriate legal review." 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: Benefit before the specified related costs. Which term fits?

A. gross saving

A Correct. gross saving: Benefit before the specified related costs. The usual combination is "report the gross saving".

B Not here. benefit owner: Person accountable for delivering and substantiating a benefit. The usual combination is "name the benefit owner".

C Not here. revenue synergy: Additional revenue attributed to integration under a defined analysis. The usual combination is "assess revenue synergies".

D Not here. source attribution: Identification of where information came from. The usual combination is "preserve source attribution".

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2. A colleague needs the term for this meaning: Identified unresolved uncertainty or exposure. Which term fits?

C. open risk

A Not here. clarification request: Question that resolves an unclear meaning or instruction. The usual combination is "make a targeted clarification request".

B Not here. business as usual: Ongoing operational work after the temporary integration phase. The usual combination is "transition to business as usual".

C Correct. open risk: Identified unresolved uncertainty or exposure. The usual combination is "retain an open risk".

D Not here. escalation contact: Named route for raising an issue requiring further authority or support. The usual combination is "verify the escalation contact".

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Review 4 / Explanations / continued

3. Rebuild the exchange from "New ownership does not rewrite every invoice instruction". Sofia: "I will not send a replacement account number or ask the customer to choose between the two sets of instructions." Daniel: [missing response] Sofia: "The logo and correct account-manager name make the email look convincing, but those details do not establish that it is genuine." Which response belongs in the gap?

B. Good. Payment redirection needs the actual controlled process and verified authorization.

A Not here. This line belongs to turn 16, after Sofia says: "Our immediate response can explain that the existing approved payment instructions remain in place while the unexpected request is checked." It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Daniel's response in turn 10. It connects Sofia's preceding point with Sofia's follow-up. Payment redirection changes where funds are sent and requires the actual authorization and control process, not an improvised response to conflicting emails.

C Not here. This line belongs to turn 2, after Sofia says: "A customer received our new logo announcement and then an email asking them to pay a different bank account. They assume both are part of integration." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 14, after Sofia says: "The customer may also need to update its supplier record, but we should give only approved entity information." 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 "An assigned issue is not a resolved issue". Morgan: "I will tell the sponsor group that handover preparation is progressing, but the operating evidence does not yet meet the criterion." Arjun: [missing response] Morgan: "After acceptance, we should review whether the integration achieved its intended service and value outcomes, not just whether the project ended." Which response belongs in the gap?

D. Include that distinction in the closure report, along with the reporting defect and the named operational responsibilities.

A Not here. This line belongs to turn 2, after Morgan says: "The process has worked for two days, and finance owns the remaining reporting issue. Can we close the workstream today?" It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 6, after Morgan says: "The finance lead has accepted responsibility for the report. Does that at least mean we can mark the defect closed?" It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 4, after Morgan says: "I do not want the integration team to remain indefinitely just because one minor report still needs attention." It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Arjun's response in turn 18. It connects Morgan's preceding point with Morgan's follow-up. The closure report records completed scope, remaining obligations, and actual closure authority rather than implying that preparation equals completion.

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Additional case 1 / Explanations

Extended conversation

1. standalone capability

Turn 3. Standalone capability requires the receiving operation to perform its defined function reliably without the temporary service, not merely produce an unchecked report.

2. extension request

Turn 5. An extension request proposes a change to the service period but does not establish that the other party has agreed to provide it.

3. service boundary

Turn 7. The service boundary defines the actual support included, so an extension of time would not automatically add new tasks or broader access.

4. exit criteria

Turn 11. Exit criteria state the evidence required before leaving the temporary arrangement, including reconciliation rather than merely generating a replacement report.

5. continuity risk

Turn 13. The continuity risk is the possible interruption or unreliable operation after support ends, which requires authorized resolution rather than an assumed extension.

6. transition plan

Turn 17. The transition plan must reflect confirmed service arrangements and actual replacement readiness rather than a requested extension being treated as completed.

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Transfer exchange

1. acknowledged

Consultant: The request was acknowledged.

Turn 1. The seller confirmed receipt, not agreement to the changed service period.

Additional case 1 / Explanations / continued

2. agreed

Lead: An extension has not been agreed.

Turn 2. The supplied facts contain no agreement changing the service duration.

3. time

Consultant: Keep the original end time visible.

Turn 3. The current service end remains relevant until an authorized change occurs.

4. risk

Lead: Escalate the continuity risk.

Turn 4. The possible service gap needs an explicit decision rather than an assumed extension.

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Additional case 2 / Explanations

Extended conversation

1. UTC-05:00

Turn 3. The originating timestamp explicitly uses UTC-05:00; the conversion depends on this supplied offset rather than an assumed seasonal city rule.

2. UTC+09:00

Turn 4. The receiving timestamp uses UTC+09:00, fourteen hours ahead of the supplied originating offset, placing the event on the next local date.

3. timestamp

Turn 6. A timestamp that includes the date, time, and offset identifies the intended instant more precisely than a date-only label.

4. handoff window

Turn 10. The handoff window specifies the agreed time available for the transfer and should be communicated consistently across calendars.

5. acceptance

Turn 12. Acceptance requires an explicit receiving commitment under the stated handoff process, not merely the existence of a calendar invitation.

6. change notice

Turn 16. The change notice communicates an actual schedule change, distinct from correcting two local representations of an unchanged instant.

[Return to the conversation, page 98](#)

Transfer exchange

1. fourteenth

US lead: Our local date is November fourteenth.

Turn 1. The originating timestamp explicitly falls on the fourteenth at the minus-five offset.

Additional case 2 / Explanations / continued

2. fifteenth

Receiving lead: Our local date is November fifteenth.

Turn 2. Adding the fourteen-hour offset difference crosses midnight into the fifteenth.

3. unchanged

US lead: The underlying instant is unchanged.

Turn 3. The two complete timestamps are supplied representations of the same instant.

4. offset

Receiving lead: Always include the UTC offset.

Turn 4. The offset defines the conversion without guessing local seasonal clock rules.

[Return to the conversation., page 100](#)

Additional case 3 / Explanations

Extended conversation

1. metric definition

Turn 3. The metric definition specifies the event being measured, which differs between dispatch and customer arrival despite the shared dashboard label.

2. denominator

Turn 5. The denominator is the hundred orders in this sample, so the difference described here is the measured event rather than a different order count.

3. common baseline

Turn 7. A common baseline requires an agreed comparable definition before historical figures can support a combined trend or integration-effect claim.

4. data lineage

Turn 9. Data lineage traces the reported figure to the underlying records and transformations so the team can verify how each measure was produced.

5. measurement specification

Turn 13. The measurement specification records the agreed event, population, exclusions, and calculation rules rather than relying on a familiar but ambiguous label.

6. combined KPI

Turn 15. A combined KPI requires comparable definitions and supporting data; matching labels alone do not make two operational measures interchangeable.

[Return to the conversation, page 102](#)

Transfer exchange

1. dispatch

Analyst: Ninety-five percent met the dispatch promise.

Turn 1. The brief assigns ninety-five successful orders to dispatch timing.

Additional case 3 / Explanations / continued

2. arrival

Lead: Eighty-two percent met the arrival promise.

Turn 2. The brief assigns eighty-two successful orders to customer-arrival timing.

3. different

Analyst: The event definitions are different.

Turn 3. Warehouse departure and customer arrival are distinct operational events.

4. decline

Lead: Do not infer an integration-related decline.

Turn 4. These unlike measures do not establish a comparable historical deterioration.

[Return to the conversation., page 105](#)

Find a phrase by purpose

Protecting Day 1 business continuity

Separate milestones: Closing is complete; platform integration is not.

Prioritize continuity: Which services must work when employees arrive on Monday?

Preserve the current plan: Payroll remains on the existing approved process.

[Full phrase bank, page 7](#)

Clarifying integration decision rights

Separate support and approval: The sponsor supports the concept; the process change is not yet authorized.

Name the owner: Finance owns this process under the agreed matrix.

Invite the right review: Local legal input is required before the decision.

[Full phrase bank, page 17](#)

Turning blunt disagreement into a workable decision

Invite the constraint: Which part of the Tuesday plan will fail, and why?

Clarify intent: Are you challenging the date or the overall integration goal?

Respond firmly: We can challenge the proposal without attacking the people who prepared it.

[Full phrase bank, page 29](#)

Handling HR differences without inventing assurances

Challenge the assumption: The title change does not establish overtime status.

Request the facts: We need the actual duties and compensation information for the review.

Protect current instructions: Continue the existing approved time-recording process.

[Full phrase bank, page 39](#)

Find a phrase by purpose / continued

Running a cross-functional IT cutover conversation

Translate the risk: Employees can sign in, but invoice posting still depends on the old service.

Limit the status: Login testing passed; end-to-end business testing has not.

Name the dependency: The scheduled job still uses a legacy service account.

[Full phrase bank, page 51](#)

Keeping customer communications and payment changes controlled

Separate identity and branding: The logo changed; the approved invoicing entity has not.

State continuity: Continue using the existing approved payment instructions.

Challenge the request: That account-change email has not been verified.

[Full phrase bank, page 61](#)

Reporting integration synergies without double counting

Label the measure: Six hundred thousand is the annualized run rate.

State realization: The completed three-month gross saving is one hundred fifty thousand.

Include the cost: The same-period integration cost reduces net realized benefit to sixty thousand.

[Full phrase bank, page 73](#)

Handing over to business-as-usual owners

Check the criterion: We have completed two stable days against a five-day requirement.

Separate assignment and resolution: Finance owns the defect, but the defect is still open.

Confirm the receiver: Who accepts the ongoing operational responsibility?

[Full phrase bank, page 83](#)

Vocabulary index

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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] Deloitte. Integrated asset management and integration management office functions.

First-party practice context for Day 1 readiness, workstream coordination, transition services, and synergy tracking; the cases and figures are original. Source checked 11 October 2026.

<https://www.deloitte.com/us/en/services/consulting/content/integrated-asset-management.html>

[2] US Department of Labor. Fact Sheet 17A.

Supports the distinction between a job title and actual exemption requirements. No salary threshold or classification determination is taught here. Source checked 11 October 2026.

<https://www.dol.gov/agencies/whd/fact-sheets/17a-overtime>

[3] NIST. Cybersecurity Framework 2.0.

Risk-governance and authorized-access context, not a prescriptive technical cutover procedure. Source checked 11 October 2026.

<https://www.nist.gov/publications/nist-cybersecurity-framework-csf-20>

[4] FBI. Business email compromise.

Supports independent verification of payment changes rather than relying on an apparent acquisition-related email alone. Source checked 11 October 2026.

<https://www.fbi.gov/how-we-can-help-you/common-frauds-and-scams/business-email-compromise>

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-cross-border-ma-integration.html>

Keep the business running while the organizations come together.

Eight post-close situations follow an international integration team working with a US business. The focus is operating the combined organization, not negotiating the acquisition price or treating national cultures as fixed personalities.

Protecting Day 1 business continuity

Legal close and completed integration are different. The supplied Monday plan preserves the existing payroll process; it does not authorize immediate migration.

Clarifying integration decision rights

The sponsor supports the objective. Under the supplied matrix, finance ownership, local legal consultation, and steering approval are still required before implementation.

Turning blunt disagreement into a workable decision

Jordan challenges the Tuesday cutover because quality approval is outstanding. That does not establish opposition to the acquisition or personal hostility.

Handling HR differences without inventing assurances

A manager title does not by itself establish exempt status. The actual requirements and role facts need qualified review; no classification change is authorized here.

Phil Stilwell

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