WIKIFREE

FOUNDATION NOTEBOOK 14

CAPM Certification: An Essential Concepts Review



Your four-domain study map

Use the current CAPM outline to organise concepts before memorising vocabulary.

Official structure

PMI groups the exam into project management fundamentals and core concepts 36%, predictive approaches 17%, agile approaches 20% and business analysis 27%. Check the official outline for the version you will take.

Use one running case

A community centre is introducing online class bookings. Requirements, schedules, stakeholder feedback and acceptance decisions all affect the same service. Apply the four domains to that case.

Review actively

Explain a term, solve a small situation and compare your reasoning with the relevant concept. This notebook provides a review route alongside detailed study and practice.

TAKE IT TO YOUR PROJECT

Make four headings in your revision notes and identify your weakest one.

Projects, operations and value

A new service needs both a change effort and an operating owner.

Understand the distinction

A project is a temporary undertaking to produce a unique result. Operations sustain ongoing work. Value depends on what useful change the result enables for stakeholders.

Centre case

The project creates the booking service and trains staff. After handover, operations run the service, support users and track booking completion. The portal's launch is a milestone in a longer value story.

Ask the right question

Who owns the service when the project finishes, and how will they know it helped? Include that owner before defining readiness.

TAKE IT TO YOUR PROJECT

Name a project output and the operating activity that follows it.

Roles and authority

A title alone does not explain which decision a person may make.

Map responsibilities

A sponsor supports the project and its business justification. A project manager coordinates project work within authority. Team members contribute expertise. Governance defines approval and escalation rights.

Centre case

The coordinator can approve a small configuration change. Spending beyond the delegated amount needs sponsor approval. The team prepares options rather than promising unapproved spending.

Use a simple record

For a major deliverable, name who does the work, who owns acceptance and who must be consulted or informed. Confirm the arrangement with those people.

TAKE IT TO YOUR PROJECT

Choose a decision and identify its authorised approver.

Life cycles and development approaches

Different kinds of uncertainty call for different planning and feedback patterns.

Choose deliberately

A life cycle describes the broad stages a project or product passes through. A development approach describes how the result is built, such as predictive, adaptive or hybrid.

Centre case

Room safety work follows agreed specifications and inspections. The booking screen benefits from quick user trials. Coordinate their dependencies through a common readiness view.

Keep terms useful

An iterative approach revises a solution through learning. Incremental delivery adds usable pieces. A team may use both while still working within organisational controls.

TAKE IT TO YOUR PROJECT

Describe a piece of work that benefits from early user feedback.

Charter and planning

Authorisation and detailed delivery planning answer different questions.

Connect the documents

A charter gives high-level project authorisation, objectives and authority. Planning develops how the team will manage and deliver the work. The business case explains why the investment matters.

Centre case

The charter states an objective to reduce booking queues and names the sponsor. The delivery plan adds schedule logic, responsibilities, risks and communication arrangements.

Check alignment

A detailed plan that serves an obsolete objective needs review. Trace its main deliverables back to the authorised purpose and approved boundaries.

TAKE IT TO YOUR PROJECT

Find the objective that justifies one major item in your plan.

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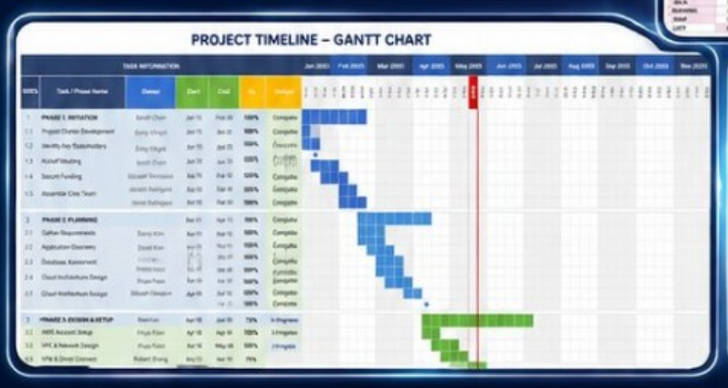
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Ethics and professional judgement

Sound project decisions depend on accurate information and fair conduct.

Recognise obligations

Act honestly, respect people and confidential information, and take responsibility for your decisions. Identify conflicts of interest and follow the organisation's relevant policies.

Centre case

A relative owns a supplier competing for the booking kiosk order. Disclose the relationship through the proper process and avoid influencing a decision in which you have a conflict.

Use evidence

If the project is late, report the actual position and the recovery options. Do not alter dates merely to make the report appear favourable.

TAKE IT TO YOUR PROJECT

Describe one way to protect the integrity of a supplier decision.

Scope and the WBS

Organise the whole deliverable before estimating the activities needed to create it.

Build a shared view

Scope defines the work and results included in the project. A work breakdown structure decomposes that scope into manageable components, supporting ownership, estimates and control.

Centre case

The scope includes configured booking software, migrated class data, trained staff and an operating handover. A software-only breakdown would leave migration and readiness work out.

Check acceptance

For each important output, identify how completion will be demonstrated. Use that evidence to check scope delivery and handle proposed additions through the agreed process.

TAKE IT TO YOUR PROJECT

Break one deliverable into three verifiable components.

Scheduling and dependencies

A realistic date needs more than a list of task durations.

Model the sequence

Activities describe work to perform. Dependencies connect their timing. Milestones identify significant points. Resource availability and the work calendar affect the dates that the logic can support.

Centre case

Configuration takes 4 days and data cleaning takes 6 days with separate people. A 2-day test needs both. With a common calendar and immediate start, the earliest finish is day 8.

Read the risk

A one-day slip in configuration may fit inside its two days of float here. A one-day slip in data cleaning moves the earliest finish to day 9.

TAKE IT TO YOUR PROJECT

Draw the two parallel paths and explain which controls the finish.

Budgeting and earned value

Compare progress and cost using the same scope and status date.

Define the measures

Planned value is the budgeted work scheduled, earned value the budgeted work performed, and actual cost the incurred cost. Ratios need nonzero denominators and consistent measurement rules.

Work the example

PV is $10,000, EV $8,000 and AC $9,000. Cost variance is -$1,000. CPI is 8/9, about 0.89. SPI is 8/10, or 0.80.

Interpret with care

The work earned less value than planned and cost more than its budgeted value. Check remaining activities before translating this into a finish-date forecast.

TAKE IT TO YOUR PROJECT

Explain why a cost ratio and a schedule date answer different questions.

Risks, issues and responses

An uncertainty record and a current problem need different next actions.

Write the situation

A risk is an uncertain event or condition affecting an objective. An issue is a current matter needing action. Responses should have an owner, trigger and a link to the objective.

Centre case

A payment interface may be unavailable during launch weekend. The team arranges a test window and fallback. When the interface actually goes down, the incident needs issue handling and operational action.

Track the result

Confirm that the response was implemented and reassess the remaining exposure. A response can create new risks or prove ineffective.

TAKE IT TO YOUR PROJECT

Write one risk with a cause, event and objective affected.

Quality and acceptance

Agree the evidence of a usable result before the final demonstration.

Plan the checks

Quality work includes planning relevant criteria, supporting suitable processes and checking outputs. Acceptance confirms that the authorised recipient agrees the specified conditions are met.

Centre case

A staff member books a class, receives confirmation and cancels the booking. The test checks the full scenario, including the returned capacity and confirmation message.

Act on failure

Record the observed result against the expected one, assign correction and retest. Repeated failures may justify examining the process that produced them.

TAKE IT TO YOUR PROJECT

Create one acceptance scenario with a clear expected result.

Stakeholders and communication

Business change affects people who may never join the project meeting.

Understand the need

Identify stakeholders, learn how the change affects them and choose appropriate engagement. Communication should serve a purpose, such as resolving an uncertainty or enabling a decision.

Centre case

Older members struggle with the online form. Reception staff handle exceptions. Invite both groups to a trial and change the process based on what you learn.

Check understanding

The sponsor needs a funding choice, while staff need a rehearsal. Tailor the medium and detail, and verify that the intended action happened.

TAKE IT TO YOUR PROJECT

Choose a stakeholder and define a useful next interaction.

Agile values and feedback

Adaptive work makes learning part of delivery.

Work in small steps

Agile approaches emphasise collaboration, useful results, feedback and adjustment. Small deliverable changes help a team test assumptions while the cost of revision is manageable.

Centre case

Release booking for one class type to a pilot group. Watch where people abandon the form, improve it and use the evidence to decide how to expand.

Keep the goal visible

A changing backlog still needs a coherent purpose and agreed quality. Discuss new information and priorities rather than treating every request as immediately executable work.

TAKE IT TO YOUR PROJECT

Identify one assumption you could test with a small usable release.

Scrum essentials

Understand the framework's purpose and the relationship between its parts.

Connect the elements

Scrum uses a Product Owner, Scrum Master and Developers, working within Sprints. Goals, backlogs, inspection and adaptation help the team address complex work and deliver usable Increments.

Centre case

The Sprint Goal is to let members book a pilot class without calling reception. Developers adjust their plan when a confirmation problem appears, keeping the goal in view.

Use the right conversation

Daily Scrum inspects progress toward the Sprint Goal. A Sprint Review involves stakeholders in inspecting the outcome and next opportunities. A Retrospective improves how the team works.

TAKE IT TO YOUR PROJECT

Explain why a stakeholder demo and a team improvement discussion serve different purposes.

Kanban and flow

Make work and its constraints visible so the team can finish useful items.

Define the workflow

Identify work items, start and finish boundaries, states, policies and how work in progress will be controlled. Measure the movement of work through those boundaries.

Centre case

Three booking fixes are waiting in Review. The review limit is two, so the team helps clear existing work rather than starting another card that cannot progress.

Read a metric

An unfinished fix started two days ago, giving it an age of two days. Once finished, its start-to-finish elapsed time becomes cycle time.

TAKE IT TO YOUR PROJECT

Choose a visible policy for when a new item may enter Review.



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Business analysis and needs

A request for a feature often contains an underlying problem worth exploring.

Understand the opportunity

Business analysis helps define needs, evaluate options and support solutions that create value. Learn the current situation, the desired change and who is affected before committing to a design.

Centre case

"Add more booking fields" might mean staff need reliable emergency contact details. Investigate how those details are used, when they are needed and what members find difficult.

Test options

A simpler form with a later contact update may work better than a long first-time form. Evaluate options against the need and relevant constraints.

TAKE IT TO YOUR PROJECT

Rewrite one feature request as a business need.

Elicit and model requirements

Use several evidence sources to understand work that people may find hard to describe.

Choose a technique

Interviews reveal perspectives, observation reveals actual work, workshops reconcile differences and prototypes make ideas tangible. Models can show processes, relationships or decision rules.

Centre case

Observe reception handling a full class. A process sketch exposes the waiting-list decision that an interview overlooked. A prototype lets staff test the proposed flow.

Validate your understanding

Take the model back to the relevant people. Ask them to walk through an ordinary case and an exception, then resolve inconsistent rules.

TAKE IT TO YOUR PROJECT

Choose a technique that could reveal an important exception.

Stories, criteria and traceability

Clear requirements can still be lost unless they stay connected to delivery.

Make the need testable

A user story captures a need from a user's perspective. Acceptance criteria state observable conditions. Traceability links needs and requirements to the relevant design, work and verification.

Centre case

A member wants to cancel a booking so another person can take the space. Criteria include restoring capacity and sending confirmation. Link the requirement to its implemented change and test.

Control the thread

When the cancellation rule changes, use the links to find affected messages, tests and training. Keep the current version understandable.

TAKE IT TO YOUR PROJECT

Trace one rule from its source to the evidence that verifies it.

Prioritise and manage the backlog

Ordering work means making value and dependencies explicit.

Use decision criteria

Compare customer need, risk, urgency, cost of delay, effort and dependencies as appropriate. The backlog should reflect a coherent objective and current learning.

Centre case

A capacity bug can oversell a class. A colour change improves appearance. Even if the colour change is easier, the consequence of overselling may justify addressing the defect first.

Explain a change

When new evidence changes the order, make the reason visible and assess its effect on current commitments. Verify who has authority for the decision.

TAKE IT TO YOUR PROJECT

Choose two items and justify their order with evidence.

Evaluate the solution

A delivered requirement needs to work in the environment where people use it.

Compare with intent

Verify the result against specified requirements and assess whether it supports the underlying need. Consider usability, operating readiness, risks and the measures used to judge value.

Centre case

The portal passes its functional tests, but reception receives more calls about failed confirmations. Investigate the user journey and operational records before declaring the service successful.

Plan the next step

Identify the gap, evidence, owner and response. Agree how to measure whether the improvement changes the result rather than merely adding another output.

TAKE IT TO YOUR PROJECT

Name a benefit measure and the person who will monitor it.

Practise across the domains

A small project situation can call on several concepts at once.

Try the scenario

A supplier delivers the portal on time. Class capacity is sometimes wrong and staff have not practised exception handling. The sponsor asks whether to announce full launch.

Reason through it

Check acceptance evidence, quality failures and operating readiness. Identify the impact on members and the business objective. Present feasible options and required decisions through the agreed governance.

Check your answer

A launch decision based only on the supplier's completion date omits relevant evidence. Explain which facts you need and who can authorise the next step.

TAKE IT TO YOUR PROJECT

Write a recommendation with its evidence and unresolved questions.

Your revision and exam-day check

Use the official outline and feedback from practice to focus your remaining work.

Recheck the source

PMI's CAPM page and examination content outline define the current exam. At the source check for this guide, the exam lists 150 questions and 180 minutes. Verify current conditions before scheduling.

Use an error log

Record the concept behind each missed practice answer, the fact you misread and a corrected example. Return to weak concepts with new scenarios rather than repeating memorised wording.

Explain readiness

Can you compare approaches, calculate basic measures and trace a need to acceptance? Use your explanations and practice feedback to choose the next study session.

TAKE IT TO YOUR PROJECT

Plan a short review across all four domains and revisit your three weakest concepts.