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Crosswind Success Series:
PMP® Exam Bootcamp Manual

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4.8. Roles and Organizations Formulas and Variables

There are no formulas related to Roles and Organizations.

4.9. Roles and Organizations Terminology

Term	Description
Actor	A user of the system (person or other system) defined by it's role with respect to the system
Agile Coach	An experienced leader who consistently directs team members to move beyond the performance of Agile practices and adopt Agile thinking
Business Owner	Scrum role that exists outside of the team that represents management; typically either sponsor, lead stakeholder, or owner of the project result (solution) or product
Core Team (Agile)	Group composed of cross-functional team members with varying levels of Agile knowledge; typically comprised of a sponsor, project management, developers, quality assurance personnel, architecture expert, product manager, and business knowledge experts
Customer	The internal or external individual(s) or entity(ies) that pay(s) to obtain a project product, service, or result
Customer (Agile)	The person or group, internal or external, responsible for creating the vision, creating and prioritizing user stories and the product backlog, writing acceptance tests, and accepting completed work; also known as the purchaser or user
Developer	Programmer
Functional Manager	A manager of any unit that creates a product or executes a service; also known as a line manager
Functional Organization	An entity that is arranged by department or purpose and focuses on operational work rather than project work
Influencer	A person or organization that is not necessarily directly related to the project but can influence the project in either a good or bad way
Initiator	An organization or individual authorized and capable of starting a project
Matrix Diagrams	A quality management tool that analyzes data by showing relationships between the data
Matrix Organization	An organizational framework that mandates the sharing of responsibility for the assignment of resources and priorities between the project manager and the functional manager
Operations	The day-to-day repeatable activities that a company performs
Organizational Learning	The study of the manner in which knowledge is elaborated by individuals, groups, and organizations

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Term	Description
Project Management Office (PMO)	An organization area responsible for standardizing governance processes for projects and for making available resources, methodologies, and tools and techniques
Project Management Team	The individuals on the project team who perform project management activities
Project Manager (PM)	The person authorized by the performing organization to direct the team accountable for realizing project objectives
Project-oriented Organizations	An organizational framework that is structured to conduct most of its activities as project work rather than functional work
Scribe	The person who documents meetings and modeling sessions
Scrum Team	A self-organizing, cross-functional group of individuals who do the work of the Scrum
ScrumMaster	The servant leader and facilitator who ensures that the Scrum process is followed, that Scrum is used in a positive way by the team, and that the team is continually improving its use of Scrum
Senior Management	Typically, management that supports the sponsor, the project charter, and ultimately the project
Servant Leader	A leader whose focus is on providing what the team needs, removing roadblocks, and performing tasks that will support and improve team productivity
Sponsor	The person or group responsible for providing resources and reinforcement for the project and for enabling the project to realize its objectives
Sprint Team	A self-organizing, cross-functional team that includes the product owner, developers, and testers
Subject Matter Expert	Any person who has a deep, specialized knowledge of a subject
Tester	The person responsible for validating and verifying that the product is done and acceptable
Tight Matrix	A phrase that describes a war room or close environment for the team; can also be used as a distracter answer on organizational-related questions
Virtual Team	A group of people with similar goals who form a team but spend little (if any) time together

The source for the above definitions is the Glossary of the Project Management Institute,
A Guide to the Project Management Body of Knowledge, (*PMBOK® Guide*) – Sixth Edition, Project Management Institute Inc., 2017

4.10. Roles and Organizations Tests and Exercises

4.10.1. Roles and Organizations Practice Test

Answers are in section 4.11.1.

1. What is an organization that controls project managers, documentation, and policies called?

   (A) Project management office
   (B) Tight matrix
   (C) Functional
   (D) Projectized

2. Jimi is being referenced constantly as huge issues come up on the project to create a new security layer on the server network. He is a published author on this new technology. What best describes his role on the project?

   (A) Subject matter expert
   (B) Sponsor
   (C) Customer
   (D) Technical lead

3. Which of the following roles is exclusive to XP (eXtreme Programming)?

   (A) Programmer-coach
   (B) Product owner
   (C) Scrummaster
   (D) Project manager

4. What is the main difference between the scrum team and sprint team?

   (A) There is no difference
   (B) The sprint team includes the product owner, the scrum team does not
   (C) The scrum team includes the product owner, the sprint team does not
   (D) The sprint team includes the sponsor, the scrum team does not

5. Which of the following roles documents meetings and modeling sessions?

   (A) Project manager
   (B) Scribe
   (C) Scrummaster
   (D) Scrum team

6. In the absence of an agile coach, which of the following roles is most likely to be coach to the team, regarding scrum framework?

    (A) Product owner
    (B) Scrummaster
    (C) Customer
    (D) Tester

7. On a large medical billing system project, the team is large and communication has been quite a challenge to control. The project expediter has been used to help with this problem. What is one of the main differences between the project expediter and the project coordinator?

    (A) The project expediter is another title for the project manager
    (B) The project expediter is another title for project coordinator
    (C) The project expediter typically has no decision-making ability
    (D) The project expediter has decision-making ability

8. What is the main role of functional managers related to projects?

    (A) To provide subject matter experts (SMEs) or services
    (B) To manage the project when the project manager isn't available
    (C) To deliver the results of the project
    (D) To manage the project managers

9. Which of the following is not an example of organizational culture and style?

    (A) Accepting the majority of change requests the customer submits
    (B) Working long hours, taking work home, and working weekends
    (C) Empowering local managers to make most significant decisions
    (D) Focusing most product development on a specific market segment

10. Rob is the PM for a project that will update the accounting software to align with new tax laws. Laura, a functional manager that provides resources for the project, keeps removing those resources. The resource removal is causing a schedule delay, which is a major issue since the project roll-out date is scheduled to occur on the date the new regulations go into effect.   Because Laura is more concerned with her department's immediate needs than with the project schedule, she is unconcerned about the schedule delay. Which role can help Rob resolve this issue?

    (A) Functional management
    (B) Portfolio management
    (C) Senior management
    (D) Project management

11. Which of the following uses cross-functional work teams?

(A) A data warehouse practice
(B) An offshore company
(C) A project that utilizes all groups across a company
(D) Union-approved workplaces

12. Which of the following is the most important job for the project manager?

(A) Controlling stakeholders
(B) Controlling unnecessary change
(C) Creating the project management plan
(D) Exceeding customer expectations

13. What is the typical role of senior management on a project?

(A) Support the project
(B) Pay for it
(C) Support the project and resolve resource and other conflicts
(D) Resolve resource and other conflicts

14. Which of the following statements is most accurate?

(A) The project management team and project team are the same thing
(B) The project management team includes project team members
(C) The project team includes project management team members
(D) None of these statements are accurate

15. Which of the following stakeholders typically "owns" the work of the project when the project is complete?

(A) Stockholders
(B) The project manager
(C) Functional manager
(D) Operations management

16. Eric is the PM of a project that is using a waterfall schedule to roll out an ERP system across six departments over six months. The plan is to give each department a month-long timebox to roll out the higher priority features within that department. There is a product owner assigned to each department to determine the higher priority items. What type of structure does this describe?

(A) Waterfall
(B) Agile
(C) Hybrid
(D) Virtual

17. Jeff is based in Dallas and is the PM of a project to upgrade the network equipment of over 250 popular retail store locations. He has an accounting team member and an HR team member based in Denver. Jeff estimates that at least 59 network engineers will be required for the multi-state, multi-time zone project. The team will work on the project until all store upgrades are complete. What type of structure is Jeff most likely to use to maximize results?

(A) Projectized
(B) Virtual
(C) Balanced matrix
(D) Departmental

18. What is the ideal project manager function regarding project changes?

(A) To delay changes so the project can be completed
(B) To control unnecessary change
(C) To prevent the change control board from seeing any more change than it needs to see
(D) To expedite all change requests to the change control board

19. Which role controls resources in a typical exam question?

(A) Functional managers
(B) Project managers
(C) Senior managers
(D) Portfolio managers

20. A business analyst has a career path that has been very important to her throughout the ten years of her career. She is put on a very important project with a strong matrix organizational structure. Which of the following is likely viewed as the most serious drawback of being on the project?

(A) Being away from the group might make career advancement in the department more difficult
(B) Working with people who have similar skills
(C) Working long hours because the project is a high priority
(D) Not being able to take the BAP Certification test because she will be so busy

21. Which role establishes the product backlog priorities?

(A) Scrummaster
(B) Developer
(C) Product owner
(D) Business owner

22. Who is accountable for creating and executing the project management plan?

(A) The team
(B) The company that was awarded the outsourcing contract
(C) The project manager and the project management team
(D) The project manager

23. What best describes the differences between the sponsor and senior management on a project?

(A) There is no difference
(B) The sponsor supports the project; senior management can own it when done
(C) Senior management controls resources; the sponsor can own the project work when done
(D) The sponsor pays for the work and can own it when done; senior management supports the project

24. The company has recently hired a portfolio manager. Historically it has only hired project managers. Which of the following best describes the focus of a portfolio manager?

(A) Ensuring the work of the project is complete
(B) Ensuring that projects are aligned with programs
(C) Ensuring that programs are part of projects
(D) Ensuring that the right work is done by the organization in that work area

25. Tom has just been promoted to program manager from his previous role as project manager. Which of the following best describes something he will do as a program manager that being a project manager didn't specifically require?

(A) Focus on completing deliverables
(B) Focus on managing benefits
(C) Focus on determining the right work to do as a company
(D) Focus on the 3 to 5-year plan

26. Which of the following best describes a stakeholder on a project?

(A) A team member
(B) The project manager
(C) Someone who works in an area impacted by the work of the project
(D) All the answers

27. The ScrumMaster is often thought of as a servant leader. Which of the following parts of the ScrumMaster position best fits that description?

    (A) Running the daily stand-up meeting
    (B) Facilitating the retrospective meeting
    (C) Removing obstacles encountered by the team
    (D) Working with the product owner

28. Blue Star Manufacturing is changing the framework of their business from a traditional structure. They have decided to make development engineering a stand alone department that will create new products and have eight regional offices with deployment teams that will install and support the new products at customer locations. Which of the following best describes this structure?

    (A) Project-based
    (B) Strong matrix
    (C) Agile
    (D) Hybrid

29. Which of the following roles are least likely to be part of the project management team?

    (A) Schedule manager
    (B) Risk manager
    (C) Budget manager
    (D) Developer

30. Which of the following is an advantage of a functional organization?

    (A) Having a home to go to when the project is complete
    (B) Not having a home when the project is complete
    (C) Having more than one project to work on
    (D) Having more than one boss

4.11. Roles and Organizations Answers for Tests and Exercises

4.11.1. Roles and Organizations Practice Test Answers

We recommend that you download answer sheets from the Crosswind website, so you can practice the test as many times as you like.

1. What is an organization that controls project managers, documentation, and policies called?

   Correct Answer: (A) Project management office
   Explanation: The project management office (PMO) can control project managers, documentation and policies or anything else needed within reason for the management of projects within an organization. [Crosswind Manual 4.9; *PMBOK® Guide* 2.4.4.3]

2. Jimi is being referenced constantly as huge issues come up on the project to create a new security layer on the server network. He is a published author on this new technology. What best describes his role on the project?

   Correct Answer: (A) Subject matter expert
   Explanation: A subject matter expert is someone who has expertise on a matter related to the project. A sponsor is the person or group who typically pays for the project. A customer is the person (or group) who typically uses the outcome of the project. Technical lead is a distracter. [Crosswind Manual 4.1; *PMBOK® Guide* 1.2.3.1]

3. Which of the following roles is exclusive to XP (eXtreme Programming)?

   Correct Answer: (A) Programmer-coach
   Explanation: The programmer-coach is an XP role. The product owner is a role used across multiple agile approaches. The ScrumMaster is a role used in scrum environments. The project manager is a role typically used in a waterfall environment.   [Crosswind Manual 4.3; No *PMBOK® Guide* Reference]

4. What is the main difference between the scrum team and sprint team?

   Correct Answer: (B) The sprint team includes the product owner, the scrum team does not
   Explanation: The sprint team includes the product owner and everyone in the scrum team. The scrum team includes the cross-functional group that will be performing the work of the sprint. [Crosswind Manual 4.3; No *PMBOK® Guide* Reference]

5. Which of the following roles documents meetings and modeling sessions?

   Correct Answer: (B) Scribe
   Explanation: The scribe is a role that documents items as needed. The project manager is responsible for project delivery. The ScrumMaster supports the scrum framework. The scrum team includes the product owner and the group doing the work of the sprint. [Crosswind Manual 4.3; No *PMBOK® Guide* Reference]

6. In the absence of an agile coach, which of the following roles is most likely to be coach to the team, regarding scrum framework?

    Correct Answer: (B) Scrummaster
    Explanation: It is not always necessary to have an agile coach, but if you do not have one, the ScrumMaster is most likely to perform coaching roles to help the team optimize performance and support the scrum framework. The product owner will typically care more about what is in the product backlog and prioritization. The customer is typically represented by the product owner. The tester is part of the scrum team. [Crosswind Manual 4.3; No *PMBOK® Guide* Reference]

7. On a large medical billing system project, the team is large and communication has been quite a challenge to control. The project expediter has been used to help with this problem. What is one of the main differences between the project expediter and the project coordinator?

    Correct Answer: (C) The project expediter typically has no decision-making ability
    Explanation: The project expediter and the project coordinator have similar responsibilities with the difference being that the project coordinator has some decision-making ability. [Crosswind Manual 4.1; No *PMBOK® Guide* Reference]

8. What is the main role of functional managers related to projects?

    Correct Answer: (A) To provide subject matter experts (SMEs) or services
    Explanation: Functional managers like human resources managers or accounting managers have a permanent staff and a clear directive to manage all tasks within their domain. Related to projects, however, they may provide SMEs or services to support projects. Project managers do not always report to functional managers. The functional manager runs a department or area of business, not the project manager. To incorporate the project deliverables into normal operations is the role of operations management. [Crosswind Manual 4.1; No *PMBOK® Guide* Reference]

9. Which of the following is not an example of organizational culture and style?

    Correct Answer: (D) Focusing most product development on a specific market segment
    Explanation: Focusing on a particular market is more a strategic business decision than a cultural aspect. All other answers are examples of the pervasive aspects of organizational culture. [Crosswind Manual 4.5.1; No *PMBOK® Guide* Reference]

10. Rob is the PM for a project that will update the accounting software to align with new tax laws. Laura, a functional manager that provides resources for the project, keeps removing those resources. The resource removal is causing a schedule delay, which is a major issue since the project roll-out date is scheduled to occur on the date the new regulations go into effect. Because Laura is more concerned with her department's immediate needs than with the project schedule, she is unconcerned about the schedule delay. Which role can help Rob resolve this issue?

    Correct Answer: (C) Senior management
    Explanation: The role that can help resolve the problem is senior management. Any member of senior management is hierarchically above a member of functional or project management. Functional management provides resources to project management. Project management is responsible for delivering the project. Portfolio management determines what work should be done to align with a strategic plan. [Crosswind Manual 4.1; *PMBOK® Guide* 6.6]

11. Which of the following uses cross-functional work teams?

Correct Answer: (C) A project that utilizes all groups across a company
Explanation: A project that utilizes all groups across a company utilizes cross-functional teams to take advantage of the knowledge and skills available. A data warehouse practice is likely a projectized organization. An offshore company is too vague an answer. Union-approved workplaces is a distracter. [Crosswind Manual 4.6.2; No *PMBOK® Guide* Reference]

12. Which of the following is the most important job for the project manager?

Correct Answer: (B) Controlling unnecessary change
Explanation: Controlling unnecessary change is one of the biggest challenges for project managers. If they don't do this well, the project can go out of control. Creating the project management plan is a good answer, but if changes are out of control, the best plan won't do any good. Exceeding customer expectations is unnecessary and could likely result in gold plating, which isn't good. Controlling stakeholders is a distracter. The expectations of stakeholders are to be managed, not controlled. [Crosswind Manual 4.2; No *PMBOK® Guide* Reference]

13. What is the typical role of senior management on a project?

Correct Answer: (C) Support the project and resolve resource and other conflicts
Explanation: Senior management outranks the project manager. They support the project by helping resolve resource issues and other conflicts. The sponsor pays for the project. [Crosswind Manual 4.1; No *PMBOK® Guide* Reference]

14. Which of the following statements is most accurate?

Correct Answer: (C) The project team includes project management team members
Explanation: The project team consist of everyone associated with the project, including project management team members. The project management team members only do project management work. [Crosswind Manual 4.1; No *PMBOK® Guide* Reference]

15. Which of the following stakeholders typically "owns" the work of the project when the project is complete?

Correct Answer: (D) Operations management
Explanation: Notice the word "typically". Virtually anyone could own the work, depending on the nature of the project and the product. However, operations management accepts the product from project management, and then operations management incorporates the product or service into normal operations, as well maintains the product or service. [Crosswind Manual 4.1; *PMBOK® Guide* 1.2.3.4]

16. Eric is the PM of a project using a waterfall schedule to roll out an ERP system across six departments over six months. The plan is to give each department a month-long timebox to roll out the higher priority features within that department. There is a product owner assigned to each department to determine the higher priority items. What type of structure does this describe?

Correct Answer: (C) Hybrid
Explanation: This type of structure is hybrid because it combines a waterfall schedule with Agile elements (timeboxes and prioritizing). Virtual doesn't necessarily apply as there isn't enough information to identify it as an option. [Crosswind Manual 4.6.3; *PMBOK® Guide* Table 1-3]

17.   Jeff is based in Dallas and is the PM of a project to upgrade the network equipment of over 250 popular retail store locations. He has an accounting team member and an HR team member based in Denver. Jeff estimates that at least 59 network engineers will be required for the multi-state, multi-time zone project. The team will work on the project until all store upgrades are complete. What type of structure is Jeff most likely to use to maximize results?

Correct Answer: (B) Virtual
Explanation: A virtual structure will work best since the project has to accommodate people in their local areas. A projectized structure is a possible answer, but doesn't specifically accommodate the varied time zones and states. A balanced matrix structure uses resources from a functional manager. A departmental structure is a distracter. [Crosswind Manual 4.7.2; *PMBOK® Guide* Table 2-1]

18.   What is the ideal project manager function regarding project changes?

Correct Answer: (B) To control unnecessary change
Explanation: The main job of a project manager, other than managing the project itself, is to control unnecessary changes that can derail the project. Delaying changes and protecting the change control board from changes are both unprofessional. Expediting changes to the CCB is not a bad answer but not the best because it doesn't help in controlling unnecessary change. [Crosswind Manual 4.2; No *PMBOK® Guide* Reference]

19.   Which role controls resources in a typical exam question?

Correct Answer: (A) Functional managers
Explanation: A typical exam question, unless otherwise stated, assumes a balanced matrix environment, which means that the project manager gets resources from the functional environment. [Crosswind Manual 4.1; No *PMBOK® Guide* Reference]

20.   A business analyst has a career path that has been very important to her throughout the ten years of her career. She is put on a very important project with a strong matrix organizational structure. Which of the following is likely viewed as the most serious drawback of being on the project?

Correct Answer: (A) Being away from the group might make career advancement in the department more difficult
Explanation: Being away from the normal group and not being able to be as easily promoted is the best answer. Being in a strong matrix environment feels fairly similar to being in a projectized organization where skill set specialty in groups does not have as high a priority. The other answers are distracters. [Crosswind Manual 4.6.2; No *PMBOK® Guide* Reference]

21.   Which role establishes the product backlog priorities?

Correct Answer: (C) Product Owner
Explanation: The product owner is the role that initially populates the product backlog and prioritizes the items the scrum team will do within a sprint. The ScrumMaster supports the team and scrum framework. The business owner is represented by the product owner. The developer does the work within the sprint. [Crosswind Manual 4.3; No *PMBOK® Guide* Reference]

22. Who is accountable for creating and executing the project management plan?

Correct Answer: (D) The project manager
Explanation: The project manager is ultimately responsible for creating the project management plan. This creation typically comes with the help of the project management team. The project manager is responsible for execution of the plan and the team members are responsible for the plan's activities. The outsourcing answer is a distracter. [Crosswind Manual 4.2; *PMBOK® Guide* 3.1]

23. What best describes the differences between the sponsor and senior management on a project?

Correct Answer: (D) The sponsor pays for the work and can own it when done; senior management supports the project
Explanation: In projects referenced in the exam, the sponsor typically pays for the project and can own it when complete. Senior management typically supports the project and can resolve resource conflicts when they occur between functional and project work. [Crosswind Manual 4.1; No *PMBOK® Guide* Reference]

24. The company has recently hired a portfolio manager. Historically it has only hired project managers. Which of the following best describes the focus of a portfolio manager?

Correct Answer: (D) Ensuring that the right work is done by the organization in that work area
Explanation: The portfolio manager's main focus is to ensure that the organization is doing the right work in alignment with a strategic plan. The project manager is there to make sure the project work is complete. The other two answers are distracters. [Crosswind Manual 4.1; No *PMBOK® Guide* Reference]

25. Tom has just been promoted to program manager from his previous role as project manager. Which of the following best describes something he will do as a program manager that being a project manager didn't specifically require?

Correct Answer: (B) Focus on managing benefits
Explanation: A program manager has a number of responsibilities and skills in common with a project manager; however a program manager focuses on managing benefits. Benefits management typically results from the outcome of multiple projects and it is the program manager that oversees multiple projects. Completing deliverables is the focus of both the project manager and program manager. The 3-5 year (strategic) plan is what determines the right work to do as an organization and is the focus of the portfolio manager or the portfolio review board. [Crosswind Manual 4.1; No *PMBOK® Guide* Reference]

26. Which of the following best describes a stakeholder on a project?

(A) A team member
(B) The project manager
(C) Someone who works in an area impacted by the work of the project

Correct Answer: (D) All the answers
Explanation: The stakeholder can be anyone impacted by the project. A stakeholder could be the sponsor, senior management, project manager, functional manager, team member, or end user. [Crosswind Manual 4.1; *PMBOK® Guide* 13.1]

27. The ScrumMaster is often thought of as a servant leader. Which of the following parts of the ScrumMaster position best fits that description?

Correct Answer: (C) Removing obstacles encountered by the team
Explanation: While all of the answers represent the responsibilities of the ScrumMaster, the responsibility that cannot be shared with or delegated to any other role is removing obstacles encountered by the team (based on servant leader mantra of putting others before themselves). [Crosswind Manual 4.3; No *PMBOK® Guide* Reference]

28. Blue Star Manufacturing is changing the framework of their business from a traditional structure. They have decided to make development engineering a stand alone department that will create new products and have eight regional offices with deployment teams that will install and support the new products at customer locations. Which of the following best describes this structure?

Correct Answer: (D) Hybrid
Explanation: The hybrid structure connects people and positions as needed, which describes the new Blue Star Manufacturing framework. A project-based structure would focus only on project work without operations or support. A strong matrix structure is almost entirely project-based. Agile is a project approach that uses time-boxes and expects change to occur. [Crosswind Manual 4.6.3; *PMBOK® Guide* Table 2-1]

29. Which of the following roles are least likely to be part of the project management team?

Correct Answer: (D) Developer
Explanation: The project management team consists of people doing management work related to projects, such as managing schedules, budgets, risks, issues, contracts, etc. A developer is a team member, but not a member of the project management team. [Crosswind Manual 4.1; No *PMBOK® Guide* Reference]

30. Which of the following is an advantage of a functional organization?

Correct Answer: (A) Having a home to go to when the project is complete
Explanation: Having a home when the project is complete is a key advantage of a functional organization. Having more than one boss and more than one project could be characteristics of a matrix organization. [Crosswind Manual 4.6.1; No *PMBOK® Guide* Reference]

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