PROJECT MANAGEMENT 101 AT WESTON & SAMPSON

GLOSSARY

The terms

A

Addenda: Changes or clarifications a client issues to a solicitation after releasing it. The pursuit team confirms how the client issues addenda and who watches for them.

Amendment: A change to the scope of services after the agreement is executed, negotiated with the client before the work begins. Excluded work built into the structure needs one before anyone starts it.

Approach: The proposal content that explains how our firm will solve the client's problem. The Technical Lead prepares it with the project team, in persuasive language, and it answers one question for the selection committee: why this firm. Once our firm is selected, the approach gives way to the scope of services.

Assumption: A statement about the pursuit that the team has not confirmed with the client. The question list separates assumptions from what the team knows firsthand. In a scope of services, an assumption is a condition the scope depends on that the client has not confirmed. A written assumption holds three parts: the condition, the quantity that condition carries, and the result if the condition changes. It appears beside the task it conditions and again in the assumptions section.

Automatic No-Go: A No answer to Question 1 or Question 2 of the Go/No-Go form. Either answer ends the pursuit regardless of the total the form produces.

Award: The phase that begins when the client selects Weston & Sampson to perform the work. It ends when our firm opens the project with a chargeable project number.

Awarded/Won: The Stage recording that the client has selected Weston & Sampson to perform the work, at a 100 percent win probability, before the project is opened.

B

Backlog: Used without qualification, the Net Labor Revenue remaining on open projects. See Existing Backlog. Backlog excludes the weighted labor revenue of opportunities.

Bid Registration: The registration Weston & Sampson files with the client or the procurement portal, where a solicitation requires one, so our firm is recorded as a responding party.

Billing Rate: The hourly amount our firm charges a client for one hour of a person's time. Our firm builds billing rates so that a project delivered at standard rates, with no write-off, reaches the target ELM at completion.

Breakeven Rate: The multiple of direct labor at which Net Revenue recovers direct labor and overhead and returns no project profit.

C

Cancelled: The Stage recording that the client has canceled the work or the project did not proceed.

Capture Plan: A written plan for winning a client or a pursuit, covering positioning and difference.

Certificate of Vote: The annually updated record of the individuals the Board of Directors authorizes to sign agreements for Weston & Sampson. It also records the contract value thresholds that apply to each. A proposal is an agreement, so one of these individuals signs it.

Client Intelligence: Our firm's working knowledge of a client before a pursuit becomes formal. What the client values, the problems they are solving, how they decide, who influences those decisions, what they expect from a consultant, and what work may be coming next. Gathered continuously during delivery rather than assembled after a solicitation drops.

Client Manager: The individual holding the relationship with a client across multiple projects and/or disciplines. The Client Manager supplies client insight and the client history that establishes which pursuit questions already have answers.

Color Team Review: A staged review of a proposal in production, scheduled at the kickoff meeting.

Combined Structure: The one Work Breakdown Structure the project manager assembles from the subtasks each discipline prepared, with the duplicates removed, so that two disciplines do not describe, schedule, and staff the same work.

Comparative Evaluation Criteria: The criteria an owner ranks firms against, stated in the solicitation with their weights.

Confirmed: One of three bases the team considers behind each Go/No-Go answer. The answer rests on a named source. In a scope of services, a confirmed item is one a named source states, such as the solicitation, a client document, or written correspondence from the client, and it enters the scope sentence as a number, a name, or a time frame.

Confirmed Go: The status Marketing records on the proposal calendar once a Go decision is made and the opportunity is open in Deltek Vantagepoint.

Contract Value: The value of the contract our firm enters into with the client.

Cost: What the work consumes.

D

Deltek Vantagepoint: Our firm's system of record, in which our firm enters and maintains each opportunity and its economic details.

Direct Appeal: A request reaching our firm outside a formal solicitation, usually from a client our firm already serves. It may come to our firm alone or to a limited number of selected competitors.

Direct Labor: The effective unit salary cost of the staff performing the work, charged directly to a project.

Disadvantaged Business Enterprise (DBE): A participation goal or teaming requirement a client sets in a solicitation. The first review of a request for proposals records any DBE goal, and the Proposal Kickoff Form carries it into production.

Discipline Leader: The person who confirms staff availability and pricing and makes final staffing decisions.

E

Effective Labor Multiplier (ELM): The ratio of Net Revenue to direct labor, measured for a person, a rate, a project, or the whole firm.

Employee Stock Ownership Plan (ESOP): The plan through which the people employed by Weston & Sampson own its stock. Contributions to it are part of overhead, and the value of the stock rises and falls with the work our firm holds and the work it expects to win.

Estimated Net Labor Revenue: An opportunity's fee target less other direct costs at cost and less any markup on them. The Net Labor Revenue measure applied to work our firm has not yet won, recorded on the OPP tab in Deltek Vantagepoint.

Evaluation Factors: The criteria the client uses to score responses. Marketing copies them into the Proposal Kickoff Form, and technical staff demonstrate at the kickoff meeting how Weston & Sampson meets each one.

Exclusion: A statement of specific work the fee does not include. Three exclusionary statements close a scope: work Weston & Sampson will not perform, work others perform with that party named, and work excluded from the scope that a reasonable client could expect to find in it, with the result if that work becomes necessary. Excluded work produces no element in the Work Breakdown Structure.

Existing Backlog: The Net Labor Revenue remaining on open projects. It excludes other direct costs and any markup on them.

Experience Expectations: What the client expects working with Weston & Sampson to be like. Communication frequency, meeting attendance, responsiveness, and how the client learns about a problem.

F

Firm Initiative: A named business direction our firm intends to grow. Question 9 of the Go/No-Go form awards 10 points where a project relates to one.

Forward Check: The pass that reads each sentence of the scope of services and finds the element of the Work Breakdown Structure that performs it. A sentence with no element is work our firm has promised that nobody has been assigned to perform.

Future Backlog: The weighted labor revenue of open opportunities.

G

Go Decision: The decision to pursue an opportunity.

Go/No-Go: The process our firm requires when a proposal or a pursuit needs a formal submission with marketing support. Some opportunities need no Go/No-Go.

Go/No-Go Form: Our firm's single form for evaluating an opportunity, completed in Deltek Vantagepoint, which scores the opportunity. On submission, it moves the Stage to Proposal and creates the promotional project number.

Gold Team Review: The name of the near final team review of a federal proposal. It follows the Red Team review and precedes the Green Team review, occurs not less than 4 days before submittal, and reviews the submission at near 100 percent completion.

Graphics Designer: The marketing role responsible for the visual content of a proposal.

Green Team Review: The name of the final team review of a proposal package. It occurs not less than 2 days before submittal and focuses on cost, schedule, scope, assumptions, and exclusions to give final approval for submittal.

Gross Revenue: A project's full fee, including other direct costs. Gross Revenue less other direct costs at cost is Net Revenue.

I

Indirect Labor: The labor of staff who do not charge their time directly to a project. A component of overhead. Proposal hours are indirect labor, so our firm pays for them whether or not it wins the work.

Inferred: One of three bases the team considers behind each Go/No-Go answer. The answer rests on experience or comparison rather than a named source. In a scope of services, an inferred item is one the team drew from experience or from a comparable project. The project manager asks the client where the solicitation permits a question, and otherwise writes an assumption.

Initiating Process: The Project Management Institute process group within which the pursuit takes place. Our firm's sequence runs lead, opportunity, Go/No-Go, proposal, award.

K

Kickoff Meeting: See Proposal Kickoff Meeting.

L

Lead: The first part of a firm pursuit or a project pursuit, at which business is being developed and no project has yet been defined.

Lead Generator: The person responsible for developing and leading a pursuit.

Lead Time: The time between the Go/No-Go form reaching Marketing in Deltek Vantagepoint and the proposal deadline. Marketing cannot guarantee support below a two week lead time.

Licensure: Professional registration in the project state for every service the solicitation requires.

M

Major Proposal: A proposal with more than $500,000 of Projected Gross Revenue, or a proposal for a critical client. A major proposal uses color team reviews where enough time exists before the due date.

Marketing Coordinator: A marketing role supporting preparation of the proposal package.

Marketing Lead (ML): The role that prepares the proposal package for submission and directs the proposal schedule, the assignments, compliance, and production. The Marketing Lead ensures the package is complete, includes all qualifications, references, and example projects, and meets the requirements of the solicitation.

Markup: The amount a project manager adds to a subconsultant cost or a reimbursable cost, at a target of 15 percent and at the project manager's discretion. Some project types permit no markup, so the project manager verifies the allowance in the solicitation and codifies any requirement or restriction in the proposal. Our firm keeps the markup, and it stays inside Net Revenue.

Minimum Evaluation Criteria: The pass or fail requirements a submission must meet to be evaluated at all.

N

Net Labor Revenue: The revenue generated by the work of Weston & Sampson staff. Net Revenue less any markup on other direct costs.

Net Revenue: The part of a project's fee our firm earns and keeps. Gross Revenue less other direct costs at cost. Net Revenue funds direct labor and overhead, and what remains on one project is project profit.

No-Go: The decision to decline a pursuit, and the Stage that records a pursuit is over. Set the No-Go Stage as soon as our firm declines or the client selects another firm. A canceled project takes the Cancelled Stage. An opportunity that is over and still open overstates the revenue projection.

Nonlabor Costs: The part of overhead that is not labor. Rent, computers and software, insurance, bonuses, and contributions to the employee stock ownership plan. Every dollar of nonlabor cost raises the Net Revenue each direct labor dollar must produce.

Nonresponsive: The status of a submission that fails any minimum evaluation criterion. The owner does not evaluate it.

O

Open Ended Words: Five words and phrases that stay out of a scope of services because they leave the amount of work open to interpretation: all, but not limited to, as directed, is common practice in the industry, and subject to approval.

Operating Income: The project profit of every Weston & Sampson project added together and reported at the firm level.

OPP Tab: The tab in Deltek Vantagepoint that holds an opportunity's Estimated Net Labor Revenue and probability of winning the work. The Go/No-Go form takes both figures from it.

Opportunity: The point at which a lead becomes a project with a revenue expectation, a win probability, and a schedule, validated by the client. Some opportunities begin without a lead. Recorded in Deltek Vantagepoint.

Opportunity Number: The number Deltek Vantagepoint assigns an opportunity. The project manager links the promotional project to it, which tracks the cost of the pursuit against the opportunity.

Opportunity Record: The Deltek Vantagepoint record of an opportunity. It holds the opportunity name, the organization, the client information, the Projected Gross Revenue, the Estimated Net Labor Revenue, the win probability, the key dates, the assigned staff, and the Stage.

Other Direct Costs (ODC): Subconsultant, vendor, and reimbursable amounts a project has and passes through to the client at cost. The cost passes through our firm without becoming earned revenue. A markup on an ODC stays with our firm, remains inside Net Revenue, and is not itself an ODC.

Overhead: Indirect labor together with nonlabor costs. Those costs include rent, computers and software, insurance, bonuses, and contributions to the employee stock ownership plan. Overhead also includes vacation, sick time, and health insurance benefits. It is most often expressed as a ratio of direct labor called the overhead rate.

Overhead Rate: The ratio of overhead to direct labor. It states how many overhead dollars our firm spends for each direct labor dollar, and it measures overhead efficiency. The rate varies year to year with our cost of doing business and is audited annually. This course uses 1.85.

Owner: The discipline responsible for completing a task or a subtask. One discipline owns each element of the Work Breakdown Structure, and where two disciplines contribute, the project manager splits the element rather than naming two owners. The people who perform the work are assigned later.

P

Performance Expectations: What the client expects the work to achieve. The permit obtained, the limit met, the plan funded, the facility returned to compliance.

Phase: A major stage of the project that ends at a milestone or a major deliverable. Preliminary design, 60 percent design, and bid support are phases, and project management is itself a phase. A phase takes a whole number in the Work Breakdown Structure and appears on the Project Description Form, the schedule, and the project folder.

Pink Team Review: The name of the first team review of a proposal. It examines an outline of the response together with a draft of the projects and the organizational chart, so people can give input at the earliest stage of the proposal.

Pre-bid Meeting: A client meeting held during a solicitation. The Proposal Kickoff Form records whether one occurred and whether Weston & Sampson attended.

Pre-proposal Meeting: Any deliberate client contact before the response is written whose purpose is to establish what the client is buying. It may be a telephone call with the Client Manager, a question at a pre-bid meeting, a site visit, a written question during the questions period, or a relationship established before the solicitation.

Prepositioning: The deliberate use of client intelligence to strengthen our firm's position before a solicitation is released. It turns scattered client observations into a practical understanding of what the client is likely to buy, why the work matters, how the client will judge value, and which questions still need answers.

Price: What the client agrees to pay. The fee the proposal states, set between the lowest fee our firm can accept and the highest fee the client will pay. Module 4 covers how our firm sets it.

Project Cost Spreadsheet: The Weston & Sampson spreadsheet on which tasks and subtasks are priced. A subtask small enough to price there is appropriately sized to manage.

Project Description Form: The Weston & Sampson form the project manager uses to open the project number. The phases and tasks entered on it become the accounting structure the project is charged against.

Project Management Plan: The plan for a project. It answers six key questions, the first of which is what is the work, and its three minimum parts are the scope of services, the schedule with project milestones, and the budget.

Project Mix: The spread of work our firm holds across its disciplines. Our firm maintains the mix that supports staffing, so the right work sits in the right disciplines and staff stay productive.

Project Principal: The principal who reviews a proposal before it leaves our firm and holds firm level accountability for the client relationship. The project Principal signs the proposal, binding our firm to its scope, schedule, and fee, provided that principal is named on the current Certificate of Vote. The project Principal also approves any write-off and any ELM, billing rate, or profitability goal below the corporate target. Older Weston & Sampson material calls the same role the Principal-in-Charge.

Project Profit: What remains when direct labor and overhead come out of the Net Revenue our firm recognizes on one project. Added together across every project, the same measure is reported as operating income.

Project Sheet: A one page project description Weston & Sampson maintains between pursuits and reuses in proposals to demonstrate relevant experience.

Projected Gross Revenue: The Gross Revenue an opportunity or a project is expected to produce, including other direct costs. Recorded on the opportunity record, and the figure that decides whether a proposal is a major proposal.

Promotional Project: The project record Deltek Vantagepoint creates when the Go/No-Go form is submitted, linked to the opportunity number. Our firm then tracks the cost of pursuing the work against the opportunity it was spent on.

Proposal: A submission made in response to a client request. A proposal may be formal or informal, and sole source or competitive.

Proposal Calendar: The marketing calendar on which the Proposal Manager marks every opportunity that has a Go decision. It gives our firm one view of every proposal in production.

Proposal Kickoff Form: The Weston & Sampson form that structures the kickoff meeting. It records the team, evaluation factors, win themes, deadlines, subconsultants, project sheets, and proposal format.

Proposal Kickoff Meeting: The mandatory first formal meeting after a Go decision, at which the Marketing Lead and the Technical Lead define and assign the work of the proposal. It covers the solicitation requirements, the complete team including subconsultants, the approach, the evaluation factors, the three win themes, the content required, the internal schedule, the quality reviewers, the delivery method, and the fee format.

Proposal Manager: The marketing role that marks an opportunity as a Go on the marketing calendar. It also has our firm's view of every proposal in production.

Proposal Number: The number Weston & Sampson opens to track the cost of pursuing an opportunity. Our firm usually opens one for a proposal requiring more than eight hours to prepare.

Proposal Signer: The individual who signs the proposal on behalf of Weston & Sampson. That individual must be listed on the current Certificate of Vote.

Proposal Writer (PW): The marketing role that reviews the solicitation, sets up the table of contents and section templates, and prepares the final document.

Pursuit: The early sequence of the project life cycle, from lead through opportunity to proposal.

Q

Quality Assurance (QA): Confirmation that the proposal is being produced correctly, managed jointly by the Marketing Lead and the Technical Lead.

Quality Control (QC): Review of the finished proposal content, performed by a technically experienced staff member not directly involved in the proposal team.

Quality Review: One of the two reviews of proposal content scheduled at the kickoff meeting. The first sits at approximately 60 percent completion and tests general direction. The second sits at approximately 95 percent completion and is the final review.

Quantity Test: The one test that governs scope language: if time will be allocated to a task, the task shall be quantifiable. Each item in a scope of services carries specific numbers, names, periods of time, and staffing.

Question List: The list a pursuit team builds from its existing client intelligence, sorting the pursuit into what the team knows firsthand, what it assumes, and what it must ask. The third column guides the client conversation where the solicitation permits.

Questions Period: The window a solicitation sets for submitting written questions to the client. The first review of a request for proposals records the date questions are due.

R

Red Team Review: The name of the team review of a proposal submittal at approximately 90 percent by a limited group. Held not less than 4 days before submittal.

Regional Manager: The manager who confirms the proposed team and pricing suit regional rates and expectations.

Reimbursable: An expense a project incurs and passes through to the client at cost. A reimbursable is an Other Direct Cost, and our firm applies a markup to it at a target of 15 percent.

Request for Proposals (RFP): A solicitation that typically asks for a proposed approach, a schedule, and the team and firm qualifications. It asks for a fee in some circumstances.

Request for Qualifications (RFQ): A solicitation that typically asks only for the team and firm qualifications for the proposed project.

Revenue Projection: The sum of existing backlog and future backlog.

Reverse Check: The pass that reads each element of the Work Breakdown Structure and finds the scope sentence that requires it. An element with no sentence is work our firm plans to perform that the fee does not cover.

Risk Management: The Weston & Sampson function that reviews client contract terms, insurance requirements, and any language the client intends to impose. Negotiate terms before submittal.

Risk Manager: The role that reviews contract language, terms and conditions, and insurance requirements before Weston & Sampson commits to them.

S

SAFER Filter: The five question review our firm applies to scope language after a draft exists and before the client reads it: Specific, Assumptions, Finite, Exclusions, and Responsibility. A passage can meet every writing standard and still fail one of the five.

Scope of Services: The statement of the work, the deliverables, the quantities, and the limits our firm commits to under the agreement. Each discipline drafts its own scope, the project manager incorporates them into one document, and the team reviews it before it is issued. With the approach, it sets the legal boundary for our work, and it answers what the client is buying.

Sole-Sourced: A request that reaches Weston & Sampson alone, with no competitors invited.

Solicitation: The document by which a client requests services. Our firm receives three types, the Request for Qualifications, the Request for Proposals, and the direct appeal.

Stage: The Deltek Vantagepoint field recording where an opportunity sits in the pursuit. Six values apply, Lead, Opportunity, Proposal, No-Go, Cancelled, and Awarded/Won.

Subconsultant: A firm Weston & Sampson engages to deliver part of a scope. The subconsultant fee is an Other Direct Cost, and our firm applies a markup to it at a target of 15 percent.

Submission Requirements: What the client requires of the response itself. Page limit, format, number of copies, delivery method, and any required forms or portal submittals. The first review of a request for proposals records them.

Subtask: The smallest unit of work the project manager assigns. One discipline performs it, the team can estimate the hours it takes, and it has a defined end that somebody can observe. A subtask takes two decimal places in the Work Breakdown Structure and appears on the schedule and the Project Cost Spreadsheet.

System of Record: Deltek Vantagepoint. Every opportunity is entered there, whether the work begins next month or a year from now, because our firm's backlog and revenue projection are built from those entries.

T

Task: A defined part of a phase that produces a deliverable or a result. Deliverables attach to tasks and not to phases. A task takes one decimal place in the Work Breakdown Structure, has one owner, and appears on the Project Description Form, the schedule, and the Project Cost Spreadsheet.

Technical Champion: The one person who leads the technical approach on a pursuit and commits the hours it requires. Named on the Go/No-Go form, and normally the Technical Lead.

Technical Lead (TL): The role that prepares the technical content of a proposal, which is the project team, the approach, the fee, and the schedule. The Technical Lead may be a project manager, technical leader, team leader, practice leader, or discipline leader. The Technical Lead commits to the proposal schedule as Technical Champion and identifies a backup designee.

Technical Proposal Hours: The hours the Technical Lead estimates and commits to preparing the technical content of a proposal. Our firm's 2024 average was 35 hours per proposal.

U

Unit Hourly Salary Cost: What one hour of a person's time costs our firm before overhead. The annual salary divided by 2,080 working hours. A $72,800 salary produces a unit hourly salary cost of $35.00.

Unknown: One of three bases the team considers behind each Go/No-Go answer. The team can name no evidence behind the answer. In a scope of services, an unknown item is one with no evidence the team can name. The project manager asks the client, another project manager, or a similar past scope, and otherwise writes an assumption.

Utilization: The share of total labor our firm charges directly to projects. It measures labor efficiency, and it is calculated as direct labor in dollars divided by total labor in dollars.

V

Value: What the client gains. The problem solved, the risk removed, the goal achieved. The client sets value, and value sets the highest fee the client will pay.

Value Discovery: The work of finding out what the client wants, and what the work is worth to the client. It happens before the proposal fixes a price on it. The question list and the client conversation are how a pursuit team performs it.

W

Weeks of Backlog: Backlog stated as time rather than money, produced by dividing a team's backlog by its weekly Net Labor Revenue. A team earning $18,000 of Net Labor Revenue a week and holding $126,000 of existing backlog has 7 weeks of backlog.

Weighted Labor Revenue: An opportunity's Estimated Net Labor Revenue multiplied by its win probability. It is future backlog, and future backlog added to existing backlog produces our firm's revenue projection. Applied at the Opportunity and Proposal stages, and not at the Lead stage.

Weighted Revenue: Weighted labor revenue plus the ODC markup of an opportunity. The markup is not multiplied by the win probability. Project managers estimate weighted revenue as weighted labor revenue, the win probability multiplied by Estimated Net Labor Revenue, and only that figure enters future backlog and the revenue projection. Applied at the Opportunity and Proposal stages, and not at the Lead stage.

Will, Shall, and Should: Three words with three separate meanings in a scope of services. Will is a declaration of purpose or a statement of fact, used for commitments Weston & Sampson makes. Shall is a requirement placed on the design. Should is a best practice or a design criterion. Must does not appear in a scope of services.

Win Probability: The project manager's estimate, between 0 and 100 percent, of how likely our firm is to convert an opportunity into signed work. Prepositioning, teaming, the qualifications of the proposed team, the client relationship, the competition, and proximity to the work all affect it. The 2025 Go/No-Go form calls the same figure the estimated win probability. The 2022 Project Management Guidelines call it the probability of winning the job. Applied at the Opportunity and Proposal stages, and not at the Lead stage.

Win Theme: A central proposal message that connects a client priority to a specific Weston & Sampson strength and states the client benefit that results. Three are recorded on the Proposal Kickoff Form, one each from marketing, technical staff, and operations, and the project manager builds one strategy from all three so the client receives one message.

Work Breakdown Structure (WBS): The scope of work organized into phases, tasks, and subtasks, for the people who perform it. It answers what the work is for the project team, in elements a project manager can assign, schedule, and budget. A WBS names work and carries no dates, no staff hours, and no cost.

Write-off: Cost our firm has incurred on a project and decides not to bill the client. The project Principal approves any write-off.

Writing Standards: The four standards that govern every sentence in a scope of services. The company name written as Weston & Sampson in full, active voice, will, shall, and should used for their separate meanings with no must, and common language with no open ended words.