



مدیریت پروژه بر اساس PMBOK به همراه الحاقیه ساخت (ویرایش هفتم)

بخش پنجم:
متناسب سازی (Tailoring)

ارائه دهندگان:

سید محمدرضا علوی پور

(PhD, PMP, CMIT)

دانشگاه Illinois Tech آمریکا

The Tailoring Process

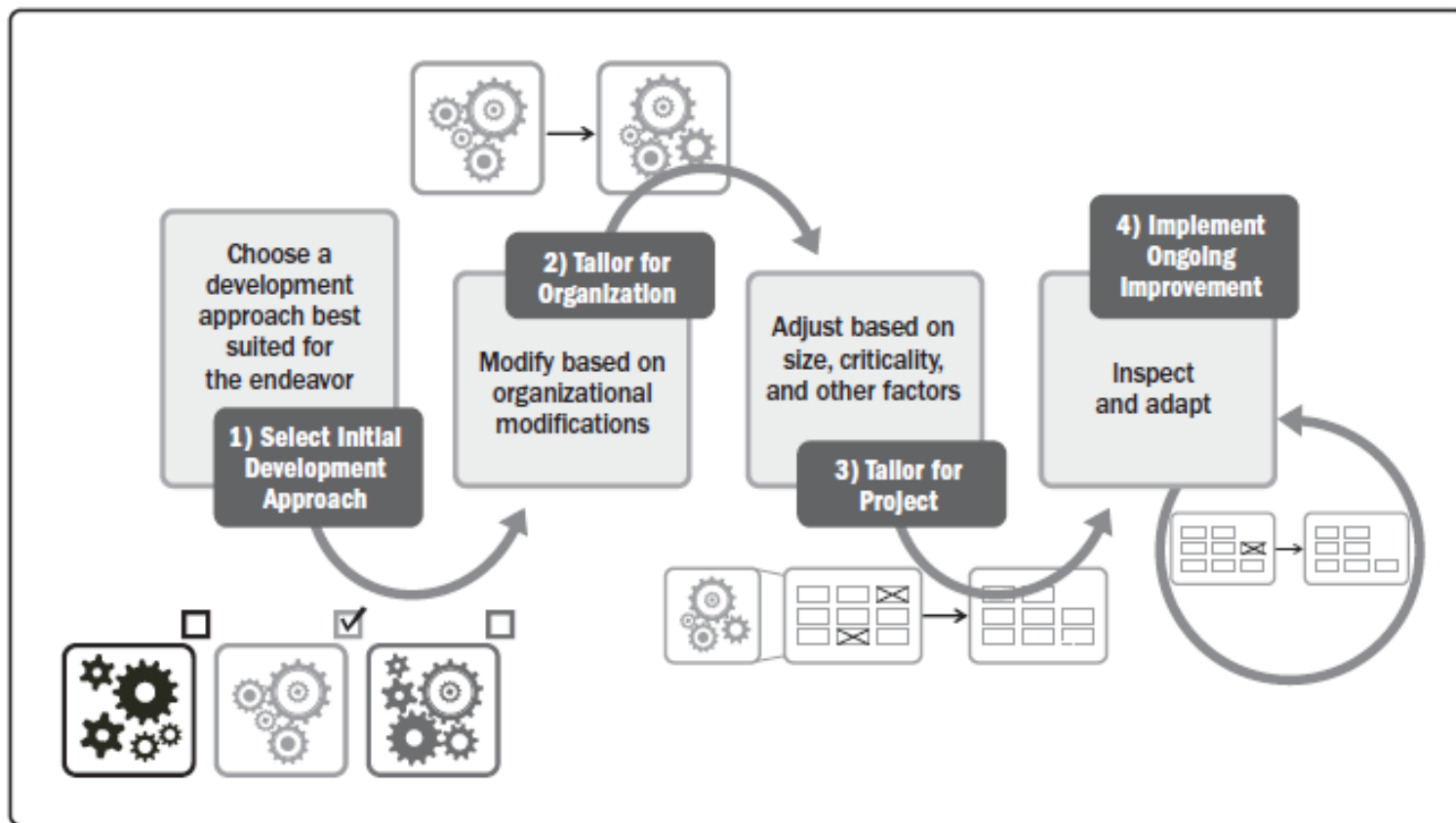


Figure 3-1. Details of the Steps in the Tailoring Process

Step 1 – Select initial development approach

- ❑ This step **determines** the development approach that will be used for the **project**.
- ❑ Project teams **apply their knowledge** of the product, delivery cadence, and awareness of the available options to select the **most appropriate development approach** for the situation.

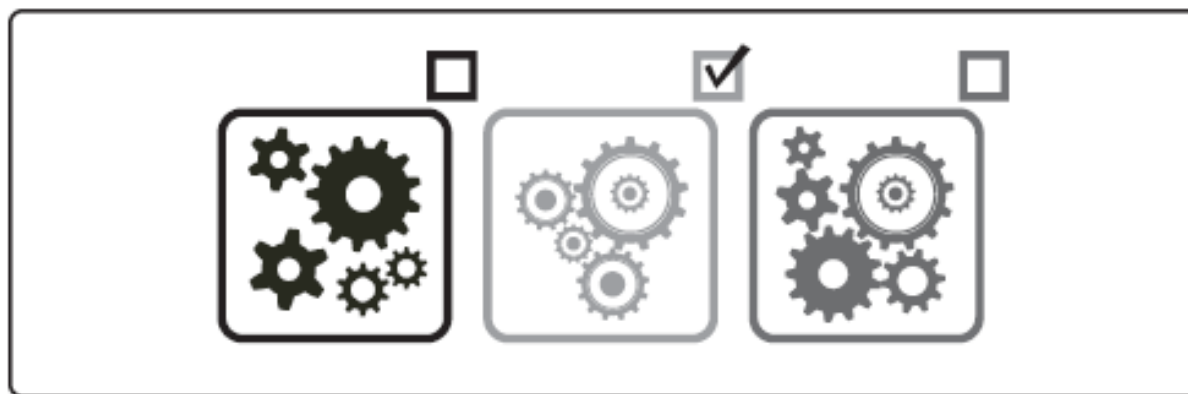


Figure 3-2. Selecting the Initial Development Approach

Step 2 – Tailor for the organization

- ❑ While **project teams** own and improve their processes,
organizations often require **some level of approval and oversight**.
- ❑ **Many organizations have** a project methodology, general management approach, or general development approach that is used as a **starting point** for their projects.
- ❑ To demonstrate that the **project team's tailoring decisions** do **not threaten** the **organization's larger strategic or stewardship goals**,
project teams may **need to justify** using a tailored approach.

Step 2 – Tailor for the organization

- ❑ **Additional constraints** for tailoring for the organization include large, safety-critical projects and projects performed **under contract**.
- ❑ The **tailoring process shown** uses factors such as project size, criticality, organizational maturity, and other considerations.

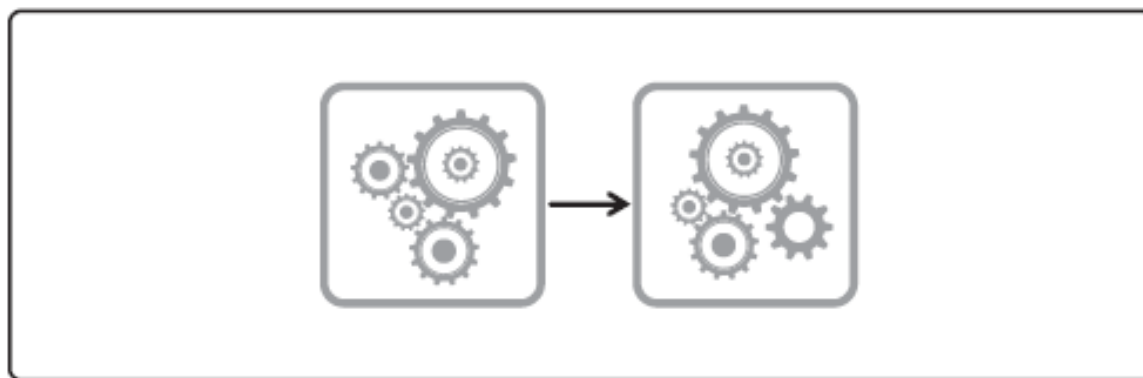


Figure 3-3. Tailoring the Approach for the Organization

Step 2 – Tailor for the organization

- ❑ Tailoring for the organization **involves** adding, removing, and reconfiguring elements of the approach to make it **more suitable** for the individual organization.

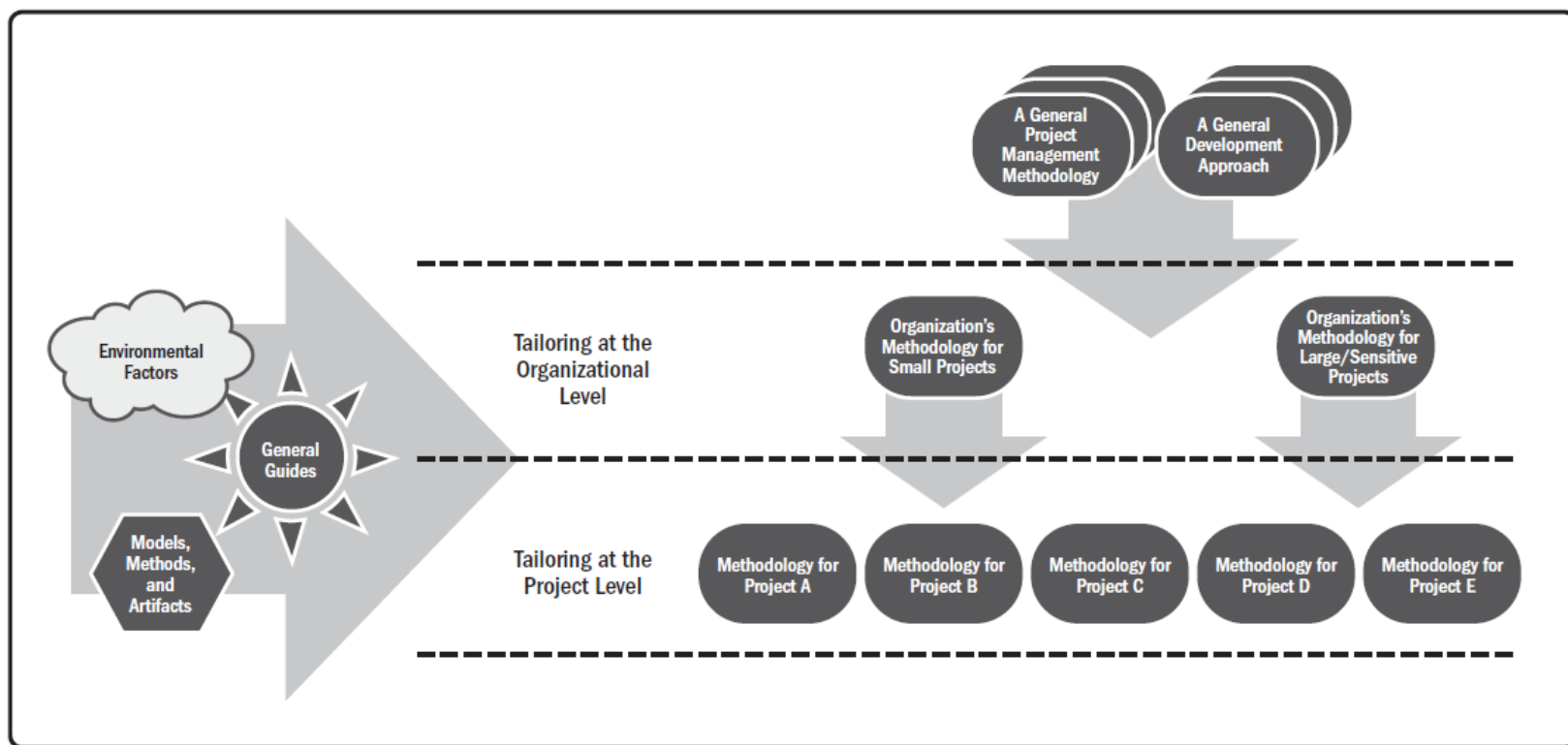


Figure 3-4. Assessing the Organizational and Project Factors When Tailoring

Step 2 – Tailor for the organization

- ❑ **Organizations** with a project management office (PMO) or value delivery office (VDO) may play a **role in reviewing and approving** tailored delivery approaches.

“ **Value Delivery Office (VDO):** A project delivery support structure that focuses on coaching teams; building agile skills and capabilities throughout the organization; and mentoring sponsors and product owners to be more effective in those roles.
A Guide to the Project Management Body of Knowledge 7th Edition, Glossary

A VDO may be found in organizations that use more adaptive delivery approaches. The VDO serves an enabling role, rather than a management or oversight function. It focuses on coaching project teams; building adaptive skills and capabilities throughout the organization; and mentoring sponsors and product owners to be more effective in those roles.

Step 2 – Tailor for the organization

- ❑ **Tailoring** that only impacts the project team (e.g., when they hold internal meetings, who works where, etc.) **requires less oversight** than tailoring that impacts external groups (e.g., how and when other departments are engaged, etc.).
 - ❖ Therefore, **internal project tailoring** might be **approved by the project manager** while tailoring changes that **impact external groups** may require approval by the PMO or VDO.
 - ❖ The PMO or VDO can assist project teams as they **tailor their approaches** by providing ideas and solutions from other project teams.

Step 3 – Tailor for the project

- ☐ **Many attributes** influence tailoring for the project.
- ☐ These include, but are not limited to:
 - ▶ Product/deliverable,
 - ▶ Project team, and
 - ▶ Culture.

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Step 3 – Tailor for the project: Product/deliverable

Attributes associated with the product or deliverable include, but are not limited to:

- ▶ **Compliance/criticality.** How much process rigor and quality assurance is appropriate?
- ▶ **Type of product/deliverable.** Is the product well known and physical, for example, something easy to recognize and describe like a building? Or something intangible like software or the design of a new drug?
- ▶ **Industry market.** What market does the project, product, or deliverable serve? Is that market highly regulated, fast moving, or slow to evolve? What about competitors and incumbents?
- ▶ **Technology.** Is the technology stable and well established or rapidly evolving and at risk of obsolescence?
- ▶ **Time frame.** Is the project time frame short as in weeks or months, or long as in several years?
- ▶ **Stability of requirements.** How likely are there to be changes to core requirements?
- ▶ **Security.** Are elements of the product business confidential or classified?
- ▶ **Incremental delivery.** Is this something the project team can develop and get stakeholder feedback on incrementally, or something that is hard to evaluate until near completion?

Step 3 – Tailor for the project: Project team

Project team considerations include:

- ▶ **Project team size.** How many full-time and part-time people will be working on the project?
- ▶ **Project team geography.** Where are the team members predominantly located geographically? Will some or all of the team be remote or colocated?
- ▶ **Organizational distribution.** Where are the team's supporting groups and other stakeholders located?
- ▶ **Project team experience.** Do the project team members have any experience in the industry, in the organization, or working with each other? Do they have the skills, tools, and technology required for the project under consideration?
- ▶ **Access to customer.** Is it practical to get frequent and timely feedback from customers or customer representatives?

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Step 3 – Tailor for the project: Culture

Evaluating the culture includes considerations regarding:

- ▶ **Buy-in.** Is there acceptance, support, and enthusiasm for the proposed delivery approach?
- ▶ **Trust.** Are there high levels of trust that the project team is capable of and committed to delivering the project outcomes?
- ▶ **Empowerment.** Is the project team trusted, supported, and encouraged to own and develop its working environment, agreements, and decisions?
- ▶ **Organizational culture.** Do the organizational values and culture align with the project approach? This includes empowering versus specifying and checking, trusting local decision making versus requesting external decision making, etc.

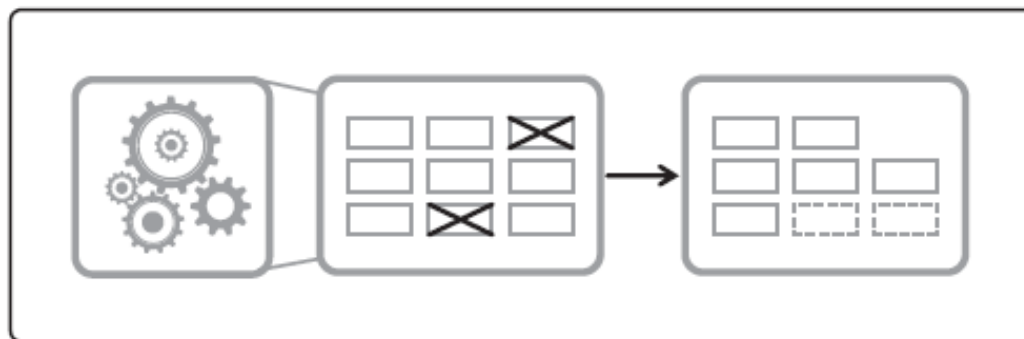


Figure 3-5. Tailoring the Approach for the Project

Step 3 – Tailor for the project: Implement outgoing improvement

- ☐ Not a single, one-time exercise.
- ☐ Progressive elaboration

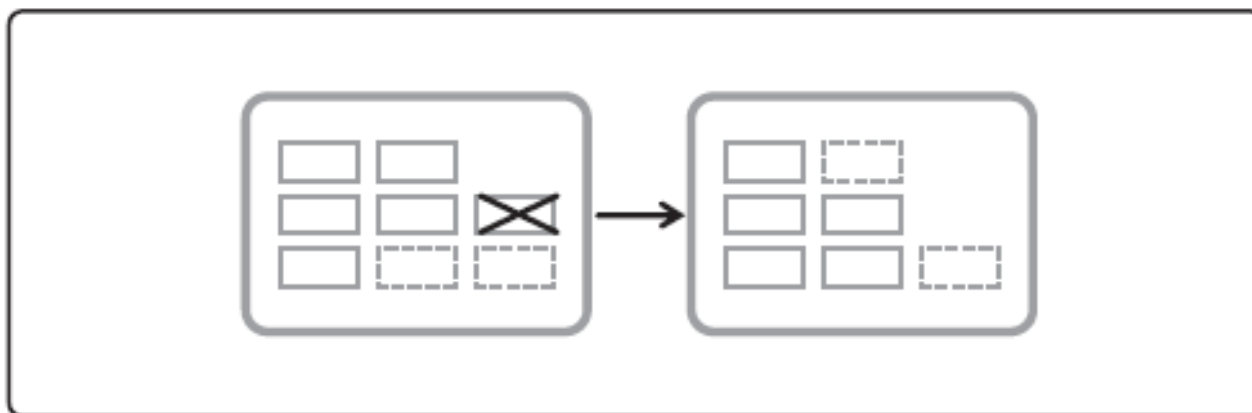


Figure 3-6. Implement Ongoing Improvement

Tailoring process

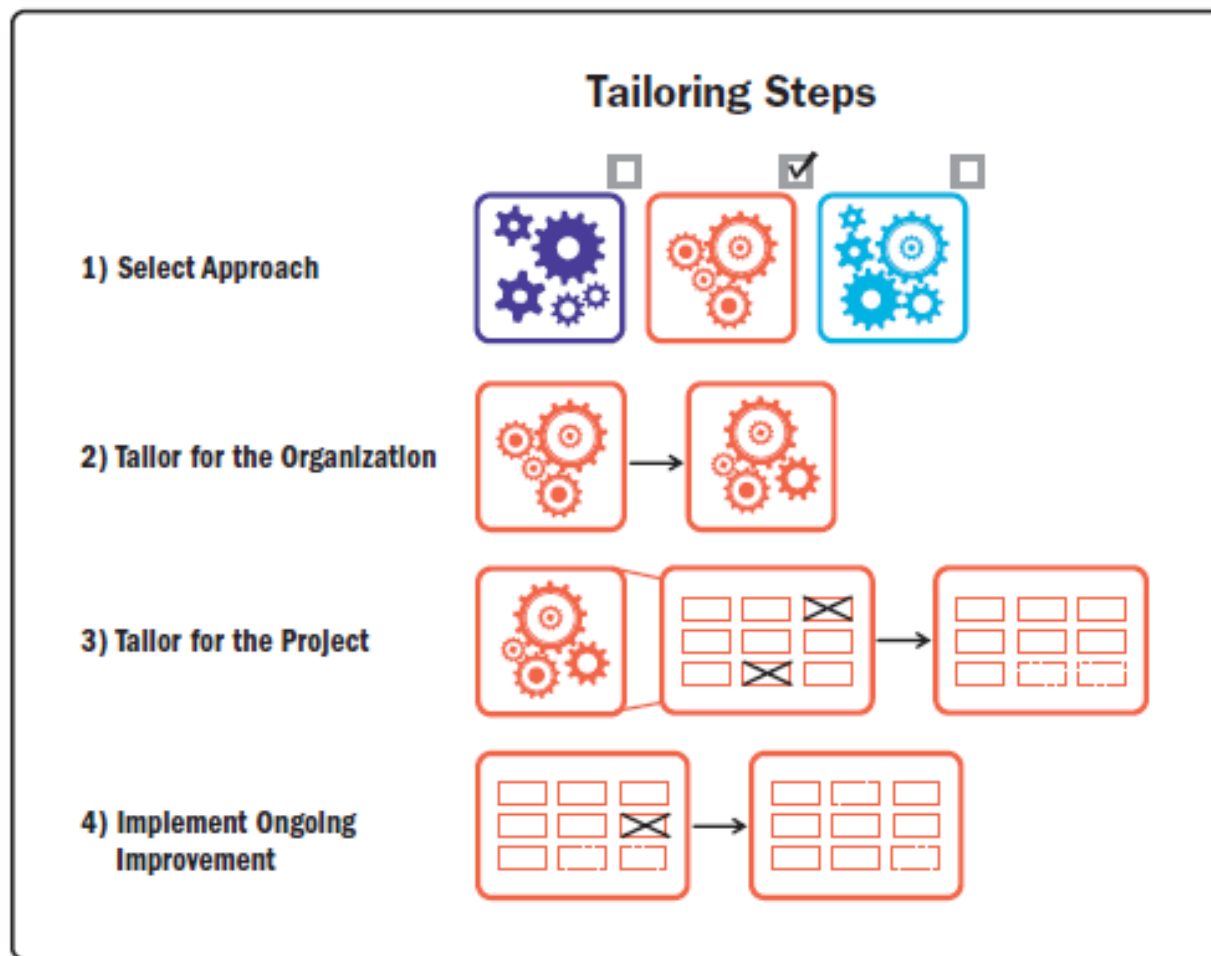


Figure 3-7. The Tailoring Process

Tailoring the Performance Domains

Introduction

- ❑ The **work associated** with **each performance domain** can also be tailored, based on the **uniqueness of the project**.

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Introduction

- ❑ As shown in Figure, the **principles for project management** provide guidance for the behavior of project practitioners as **they tailor the performance domains** to **meet the unique needs** of the project context and the environment.

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Tailoring to fit the project context

Principles of Project Management

Be a diligent, respectful,
and caring steward

Create a collaborative
team environment

Effectively engage
with stakeholders

Focus on value

Recognize, evaluate,
and respond to
system interactions

Demonstrate leadership
behaviors

Tailor based on context

Build quality into
processes and deliverables

Navigate complexity

Optimize risk responses

Embrace adaptability
and resiliency

Enable change to achieve
the envisioned future state

Guide Behavior

What are **some considerations** related
to each of the **performance domains**?



Tailor to fit the project context

Tailoring considerations

1. Stakeholders
2. Project team
3. Development approach and life cycle
4. Planning
5. Project work
6. Delivery
7. Measurement
8. Uncertainty

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Tailoring considerations – Stakeholders

- ▶ Is there a collaborative environment for stakeholders and suppliers?
- ▶ Are the stakeholders internal or external to the organization, or both?
- ▶ What technologies are most appropriate and cost effective for communicating to stakeholders? What communication technology is available?
- ▶ Is one language used with stakeholders? Have allowances been made to adjust to stakeholders from diverse language groups?
- ▶ How many stakeholders are there? How diverse is the culture within the stakeholder community?
- ▶ What are the relationships within the stakeholder community? The more networks in which a stakeholder or stakeholder group participates, the more complex the networks of information and misinformation the stakeholder may receive.

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Tailoring considerations – Project team

- ▶ What is the physical location of project team members? Is the project team colocated? Is the project team in the same geographical area? Is the project team distributed across multiple time zones?
- ▶ Does the project team reflect diverse viewpoints and cultural perspectives?
- ▶ How will project team members be identified for the project? Are project team members full time or part time on the project? Are there available contractors capable of performing the work?
- ▶ Does the project team have an established culture? How will tailoring be influenced by the existing culture, and how will the existing culture be influenced by tailoring?
- ▶ How is project team development managed for the project? Are there organizational tools to manage project team development or will new ones need to be established?
- ▶ Are there project team members who have special needs? Will the project team need special training to manage diversity?

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Tailoring considerations – Development approach and life cycle

- ▶ Which development approach is appropriate for the product, service, or result? If adaptive, should the project be developed incrementally or iteratively? Is a hybrid approach best?
- ▶ What is an appropriate life cycle for this specific project? What phases should comprise the project life cycle?
- ▶ Does the organization have formal or informal audit and governance policies, procedures, and guidelines?

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Tailoring considerations – Planning

- ▶ How might internal and external environmental factors influence the project and its deliverable?
- ▶ What are the factors influencing durations (such as the correlation between available resources and their productivity)?
- ▶ Does the organization have formal or informal policies, procedures, and guidelines related to cost estimating and budgeting?
- ▶ How does the organization estimate cost when using adaptive approaches?
- ▶ Is there one main procurement or are there multiple procurements at different times with different sellers that add to the complexity of the procurement processes?
- ▶ Are local laws and regulations regarding procurement activities integrated with the organization's procurement policies? How does this affect contract auditing requirements?

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Tailoring considerations – Project work

- ▶ What management processes are most effective based on the organizational culture, complexity, and other project factors?
- ▶ How will knowledge be managed in the project to foster a collaborative working environment?
- ▶ What information should be collected throughout and at the end of the project? How will the information be collected and managed? What technology is available to develop, record, transmit, retrieve, track, and store information and artifacts?
- ▶ Will historical information and lessons learned be made available to future projects?
- ▶ Does the organization have a formal knowledge management repository that a project team is required to use, and is it readily accessible?

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Tailoring considerations – Delivery

- ▶ Does the organization have formal or informal requirements management systems?
- ▶ Does the organization have existing formal or informal validation and control-related policies, procedures, and guidelines?
- ▶ What quality policies and procedures exist in the organization? What quality tools, techniques, and templates are used in the organization?
- ▶ Are there any specific quality standards in the industry that need to be applied? Are there any specific governmental, legal, or regulatory constraints that need to be taken into consideration?
- ▶ Are there areas of the project with unstable requirements? If so, what is the best approach for addressing the unstable requirements?
- ▶ How does sustainability factor into the elements of project management or product development?

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Tailoring considerations – Measurement

- ▶ How is value measured?
- ▶ Are there measures for financial value and nonfinancial value?
- ▶ How will the project enable data capture and reporting related to benefits realization, both during the project and after the project is complete?
- ▶ What are the project status reporting requirements?

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Tailoring considerations – Uncertainty

- ▶ What is the **risk appetite and risk tolerance** for this endeavor?
- ▶ How are **threats and opportunities** best **identified** and **addressed** within the selected development approach?
- ▶ How will the **presence of** project complexity, technological uncertainty, product novelty, cadence, or progress tracking **impact the project**?
- ▶ Does the **project's size** in terms of budget, duration, scope, or project team size require a **more detailed** approach to risk management? Or is the **project small enough to justify** a simplified risk management process?
- ▶ Is a **robust risk management** approach demanded by **high levels of innovation**, new technology, commercial arrangements, interfaces, or other external dependencies? Or is the **project simple enough** that a reduced risk management process **will suffice**?
- ▶ How **strategically important is the project**? Is the **level of risk increased** for this project because it aims to **produce breakthrough opportunities**, addresses significant blocks to organizational performance, or **involves major product innovation**?

Diagnostics

Introduction

- ❑ **Periodic reviews** and **retrospectives** or lessons learned to see if
 - ❖ Approaches are working well
 - ❖ Improvements can be made by tailoring
- ❑ This section is intended as **general guidance** and does not address every possible situation that could surface within a project.

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Common situations and tailoring suggestion

Situation	Tailoring Suggestion
Poor quality deliverables	Add more feedback verification loops and quality assurance steps.
Team members unsure of how to proceed or undertake their work	Add more guidance, training, and verification steps.
Long delays waiting for approvals	Try streamlining approval decisions through fewer people authorized to make decisions up to certain value thresholds.
Too much work in progress or high rates of scrap	Use techniques like value stream mapping and kanban boards to visualize the work, identify the issues, and propose solutions.
Stakeholders are not engaged or share negative feedback	Evaluate whether sufficient information is being shared with stakeholders; feedback loops are present and working; and deeper engagement may work better than simply communicating.
Lack of visibility and understanding of project progress	Check to ensure appropriate measures are being collected, analyzed, shared, and discussed during team and stakeholder meetings; validate agreement with the measures within the team and with stakeholders.
Issues and/or risks for which the team is unprepared continue to surface, requiring the team to react rather than progress work	Explore root causes to identify whether there are related gaps in project processes or activities.

Summary

Introduction

❑ The tailoring process involves four steps:

- ▶ Select initial approach.
- ▶ Tailor for the organization.
- ▶ Tailor for the project.
- ▶ Implement ongoing improvement.

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مدیریت پروژه بر اساس PMBOK به همراه الحاقیه ساخت (ویرایش هفتم)

بخش ششم:
مدل‌ها، روش‌ها و Artifacts

ارائه دهندگان:

سید محمدرضا علوی پور

(PhD, PMP, CMIT)

دانشگاه Illinois Tech آمریکا



What we will learn?

- ☐ Overview
- ☐ Commonly Used Models
- ☐ Models Applied Across Performance Domains
- ☐ Methods Applied Across Performance Domains
- ☐ Commonly Used Artifacts
- ☐ Artifacts Applied Across Performance Domains

Overview

Introduction

- ❑ This section provides a **high-level description** of some **commonly used** models, methods, and artifacts that are **useful in managing projects**.
- ❑ The items listed in this section are **not intended** to be exhaustive or prescriptive, **but rather** to help project teams think about the **options available to them**.

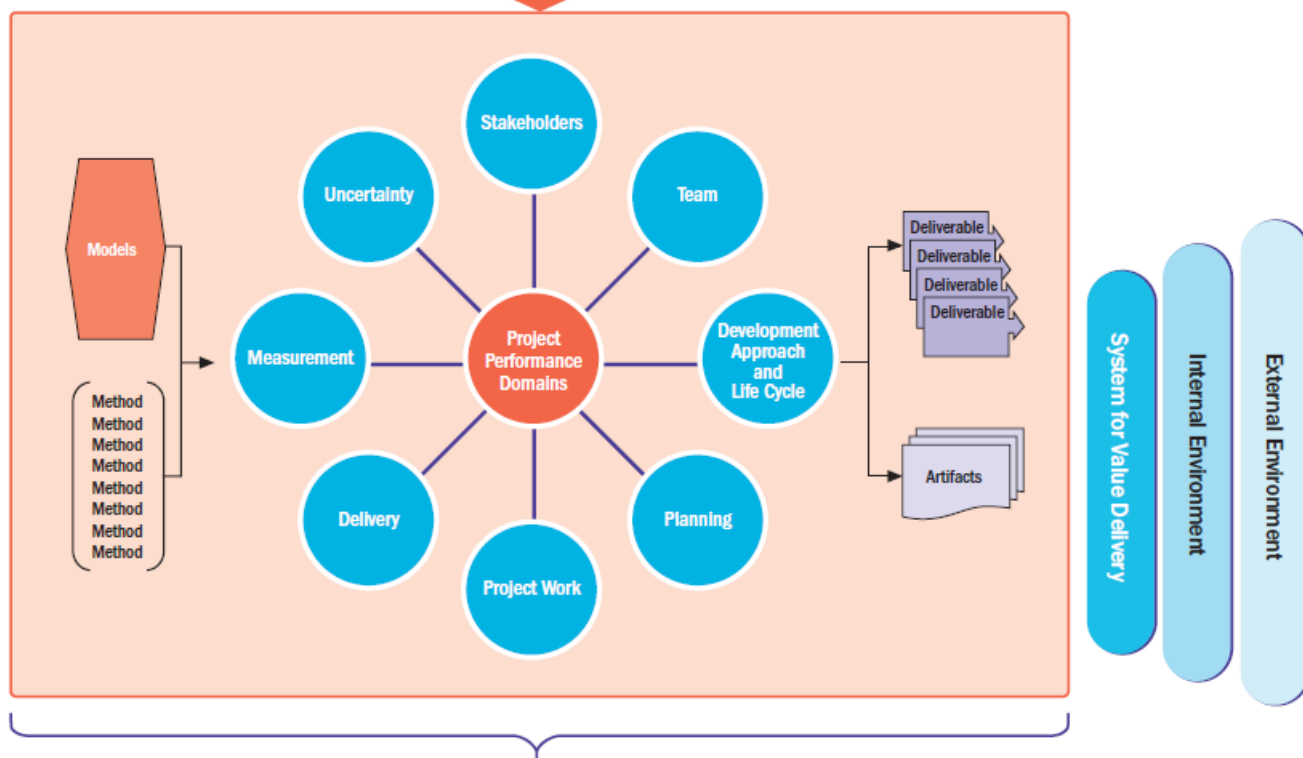
In the context of this guide, terms are defined as follows:

- ▶ **Model.** A model is a thinking strategy to explain a process, framework, or phenomenon.
- ▶ **Method.** A method is the means for achieving an outcome, output, result, or project deliverable.
- ▶ **Artifact.** An artifact can be a template, document, output, or project deliverable.

Tailor to fit the project context

Principles of Project Management			
Be a diligent, respectful, and caring steward	Create a collaborative team environment	Effectively engage with stakeholders	Focus on value
Recognize, evaluate, and respond to system interactions	Demonstrate leadership behaviors	Tailor based on context	Build quality into processes and deliverables
Navigate complexity	Optimize risk responses	Embrace adaptability and resiliency	Enable change to achieve the envisioned future state

Guide Behavior



Tailor to fit the project context

Commonly Used Models

Introduction

- ❑ **Models** reflect small-scale, simplified views of reality and **present scenarios**, strategies, or approaches for **optimizing work processes and efforts**.
- ❑ A **model** helps to **explain how something works** in the real world.
- ❑ **Models** can **shape behavior** and **point to approaches** for solving problems or **meeting needs**.
- ❑ **Some models** were **developed** with projects and project teams in mind, **others** are **more general** in nature.
- ❑ The content in this section does **not describe** how to develop or create new models.

Introduction

- ❑ The **model descriptions** presented provide a high-level view.
- ❑ Project **team members** and **other stakeholders** can refer to **many sources** (e.g., PMI's library of standards products and PMISTandards+™) for more-complete descriptions and explanations of the models.

What models?

1. Situational leadership models
 - i. Situational Leadership II
 - ii. OSCAR Model
2. Communication models
 - i. Cross-cultural communication
 - ii. Effectiveness of communication channels
 - iii. Gulf of execution and evaluation
3. Motivation models
 - i. Hygiene and motivational factors
 - ii. Intrinsic versus extrinsic motivation
 - iii. Theory of needs
 - iv. Theory X, Theory Y, Theory Z

4. Change models
 - i. Managing change in organizations
 - ii. ADKAR model
 - iii. The 8-Step process for leading change
 - iv. Virginia stair change model
 - v. Transition model
5. Complexity models
 - i. Cynefin framework
 - ii. Stacey matrix
6. Project team development models
 - i. Tuckman ladder
 - ii. Drexler/Sibbet team performance model
7. Other models
 - i. Conflict model
 - ii. Negotiation
 - iii. Planning
 - iv. Process groups
 - v. Salience model

Situational leadership models

- ❑ A **subset** of a vast array of **leadership models**
- ❑ **Leadership styles** are also **tailored Situational**
- ❑ **Leadership models** describe **ways to tailor one's leadership style** to meet the needs of the individual and the project team.

Situational leadership models - Situational Leadership® II

- ❑ Ken Blanchard's Situational Leadership® II **measures** project team member development using

1. Competence

- ❖ Competence is the **combination** of ability, knowledge, and skill.

2. Commitment

- ❖ Commitment speaks to the confidence and motivation an individual has.

*As an individual's competence and commitment **evolve**,*

leadership styles evolve from directing

to coaching

to supporting

to delegating

in order to meet the individual's needs.

Situational leadership models – OSCAR Model

- ☐ The **OSCAR** coaching and mentoring model was developed by **Karen Whittleworth** and **Andrew Gilbert**.
- ☐ It helps **individuals** adapt their coaching or leadership styles to **support individuals** who have an action plan for personal development.
- ☐ The model refers to **five contributing factors**.

Let's see these factors!

Situational leadership models – OSCAR Model

- ▶ **Outcome.** An outcome identifies the long-term goals of an individual and the desired result from each conversation session.
- ▶ **Situation.** A situation enables conversation about the current skills, abilities, and knowledge level of the project team member; why the person is at that level; and how that level impacts the individual's performance and peer relationships.
- ▶ **Choices/consequences.** Choice and/or consequences identify all the potential avenues for attaining the desired outcome and the consequences of each choice so an individual can choose viable avenues for reaching their long-term goals.
- ▶ **Actions.** An action commits to specific improvements by focusing on immediate and attainable targets that an individual can work toward within a specified time frame.
- ▶ **Review.** Holding regular meetings offers support and helps to ensure that individuals remain motivated and on track.

Communication models

- ❑ **Communication models** demonstrate concepts associated with
 1. **How** sender and receiver frames of reference impact the effectiveness of communication
 2. **How** the communication medium influences the effectiveness of communication
 3. **Types of disconnects** between end-user expectations and reality

What are communication models?

Communication models – Cross-Cultural communication

❑ A communication model developed by Browaeys and Price

1. Incorporates the idea that the **message itself**

2. **How** it is **transmitted** is **influenced** by

sender's current knowledge, experience, language, thinking, and communication styles, as well as stereotypes and relationship to the receiver.

3. Similarly, the receiver's knowledge, experience, language, thinking, and communication styles, as well as stereotypes and relationship to the sender will influence **how the message is interpreted**.

Communication models – Effectiveness of Communication Channels

- ❑ **Alistair Cockburn** developed a model that describes the **communication channels** along the axes of effectiveness and richness.
 - ❖ As defined by Richard Daft and Robert Lengel, **richness** relates to the **amount of learning** that can be **transmitted** through a medium.
 - ❖ **Media richness** is a function of characteristics, including the ability to:
 - ▶ Handle multiple information cues simultaneously,
 - ▶ Facilitate rapid feedback,
 - ▶ Establish a personal focus, and
 - ▶ Utilize natural language.
 - ❖ Richer communication channels: Face-to-Face
 - ❖ Less rich communication channels: Note or a text message

Communication models – Gulf of execution and Evaluation

- ❑ **Donald Norman** described the gulf of execution as the degree to which an item corresponds with what a person expects it to do.
 - ❖ Said another way, it is the **difference** between
 - ✓ Intention of a user
 - ✓ What the item allows them to do or supports them in doing
 - *A car that has the ability to parallel park itself would have a gulf of execution if the driver expected to push a button labeled “park” and have the car park itself, and the car did not park itself.*

Motivation models

- ☐ People perform better when they are motivated, and
- ☐ People are motivated by different things

Let's see four models described in PMBOK!

Motivation models – Hygiene and motivational factors

- ❑ **Frederick Herzberg** believed that job satisfaction and dissatisfaction stem from conditions called **motivational factors**.
- ❑ **Motivational factors** include matters that relate to the **content of the work**, such as achievement, growth, and advancement.
 - ❖ **Insufficient motivational factors** lead to **dissatisfaction**.
 - ❖ **Sufficient motivational factors** lead to **satisfaction**.
- ❑ Herzberg also identified **hygiene factors** related to the **work**, such as company policies, salary, and the physical environment.
 - ❖ If hygiene factors are insufficient, they cause **dissatisfaction**.
 - ❖ However, even if they are sufficient, they do **not lead to satisfaction**.

Motivation models – Intrinsic versus extrinsic motivation

- ❑ Daniel Pink published several books about the **intrinsic factors that motivate people.**
- ❑ He stated that while **extrinsic rewards**, such as salary, are motivators to a certain extent,

once a **person is paid fairly** for their work, the motivational power of extrinsic rewards ceases to exist.
 - ❖ For **complicated and challenging work**, such as much of the work on projects, **intrinsic motivators** are far **longer lasting** and more effective.

Pink identifies three types of intrinsic motivators

Motivation models – Intrinsic versus extrinsic motivation

- ❑ Pink identifies three types of intrinsic motivators: autonomy, mastery, and purpose:
 - ▶ **Autonomy.** Autonomy is the **desire to direct one's own life**. This is aligned with being **able to determine** how, where, and when to accomplish work. Autonomy includes flexible work hours, working from home, and work on self-selecting and self-managing project teams.
 - ▶ **Mastery.** Mastery is about **being able to improve and excel**. The desire to do excellent work, learn, and achieve goals are aspects of mastery.
 - ▶ **Purpose.** Purpose speaks to the need to **make a difference**. **Knowing** the project vision and how work contributes to achieving that vision allows **people to feel** like they are making a difference.

Motivation models – Theory of needs

- ❑ **David McClellan's model** states that all people are driven by needs of achievement, power, and affiliation.
- ❑ The **relative** strength of **each need** depends on an individual's experiences and culture.
 - ▶ **Achievement.** People who are motivated by achievement, such as reaching a goal, are motivated by **activities and work** that is challenging, but reasonable.
 - ▶ **Power.** People who are motivated by **power** like to organize, motivate, and lead others. They are motivated by increased responsibility.
 - ▶ **Affiliation.** People who are motivated by **affiliation** seek acceptance and belonging. They are motivated by being part of a team.

Motivation models – Theory X, theory Y, and theory Z

- ❑ **Douglas McGregor** devised the Theory X and Theory Y models, which represent a spectrum of employee motivation and corresponding management styles.
 - ▶ **Theory X.** The X side of the spectrum assumes **individuals work** for the sole purpose of income.
 - ❖ They are not ambitious or goal oriented. The corresponding management style to motivate these individuals is a hands-on and top-down approach.
 - ❖ This management style is often seen in a **production or labor-intensive environment**, or one with many **layers of management**.

Motivation models – Theory X, theory Y, and theory Z

- ❑ **Douglas McGregor** devised the Theory X and Theory Y models, which represent a spectrum of employee motivation and corresponding management styles.
 - ▶ **Theory Y.** The Y side of the spectrum assumes that individuals are **intrinsically motivated** to do good work.
 - ❖ The **corresponding management style** has a more personal coaching feel.
 - ❖ The **manager** encourages creativity and discussion.
 - ❖ This **management style** is often seen in creative and knowledge worker environments.

Motivation models – Theory X, theory Y, and theory Z

- ❑ **Douglas McGregor** devised the Theory X and Theory Y models, which represent a spectrum of employee motivation and corresponding management styles.
 - ▶ **Theory Z.** Abraham Maslow saw Theory Z as a transcendent dimension to work **where** individuals are motivated by self-realization, values, and a higher calling.
 - ❖ The **optimal management style** in this situation is one that cultivates insight and meaning.
 - ❖ **William Ouchi's version of Theory Z** focuses on **motivating employees** by creating a job for life where the focus is on the **well-being of employees and their families**. This style of management seeks to promote high productivity, morale, and satisfaction.

Change models

- ❑ Many projects contain an aspect of changing systems, behaviors, activities, and sometimes, cultures.
- ❑ Managing this type of change requires **thinking about how** to transition from the current to the future desired state.

There are many models that describe the **activities** **necessary** for successful change management.

Change models – Managing change in organizations

- ❑ A Practice Guide [3] is an **iterative model** has **five associated elements** interconnected through a series of feedback loops:
- ▶ **Formulate change.** This element focuses on **building the rationale** to help people understand why change is needed and how the future state will be better.
 - ▶ **Plan change.** The **identification of activities** helps people prepare for the transition from the current to the future state.
 - ▶ **Implement change.** This **iterative element** focuses on demonstrating the future state capabilities, checking to ensure the capabilities are having the intended impact, and **making necessary improvements or adaptations** in response.
 - ▶ **Manage transition.** This element considers **how to address needs** related to the change that may surface once the **future state is achieved**.
 - ▶ **Sustain change.** This element seeks to **ensure that the new capabilities** continue and **previous processes** or behaviors cease.

Change models – Adkar model

- ❑ **Jeff Hiatt** developed the ADKAR® Model which focuses on **five sequential steps** that **individuals undergo** when adapting to change:
- ▶ **Step 1: Awareness.** This step identifies **why** the change is **necessary**.
 - ▶ **Step 2: Desire.** Once people know why the change is necessary, there needs to be a **desire to be part of** and support the change.
 - ▶ **Step 3: Knowledge.** People need to understand **how to change**. This includes understanding new processes and systems in addition to new roles and responsibilities. **Knowledge** can be imparted through training and education.
 - ▶ **Step 4: Ability.** In this step, **knowledge is supported** with hands-on practice and access to expertise and help as needed.
 - ▶ **Step 5: Reinforcement.** Reinforcement **supports the sustainment** of the change. This can include rewards, recognition, feedback, and measurement.

Change models – The 8-step process for leading change

- ❑ **John Kotter** introduced the **8-Step Process** for Leading Change for transforming organizations.
- ❑ It is a **top-down approach** where the **need** for and approach to change **originates** at the top levels of the organization, and then is promoted down through the organization's layers of management to the change recipients.

Change models – The 8-step process for leading change

- ▶ **Step 1: Create urgency.** Identify **potential threats and opportunities** that drive the need for change.
- ▶ **Step 2: Form a powerful coalition.** Identify the **change leaders**. Change leaders are not necessarily based on hierarchy. The change leaders should be influential people from a variety of roles, expertise, social, and political importance.
- ▶ **Step 3: Create a vision for change.** Identify the **values** that are central to the change. Then create a brief vision statement that summarizes the change. Next, identify a strategy to realize the vision.
- ▶ **Step 4: Communicate the vision.** **Communicate** the vision throughout the change process. **Apply** the vision throughout all aspects of the organization. Senior management and the change coalition should consistently communicate the vision and demonstrate the urgency and benefits of the change.

Change models – The 8-step process for leading change

- ▶ **Step 5: Remove obstacles.** All change comes with **obstacles**. Sometimes the obstacles are outdated processes, sometimes they are based on the organizational structure, and sometimes they are people resistant to change. Regardless, all obstacles **need to be addressed**.
- ▶ **Step 6: Create short-term wins.** Identify **quick and easy wins** to build momentum and support for the change.
- ▶ **Step 7: Build on the change.** Once the **short-term wins** are complete, the organization needs to set goals for continued improvement.
- ▶ **Step 8: Anchor the changes in corporate culture.** Ensure the change becomes ingrained into the **culture**: continue to communicate the vision, tell success stories, recognize people in the organization who embody and empower the change, and continue to support the change coalition.

Change models – Virginia stair change model

- ❑ **Virginia Satir** developed a model of how people experience and cope with change.
- ❑ Its purpose is to help project **team members understand**
 1. What they are feeling
 2. Enable them to move through change more efficiently.

برخی از روش های متداول تحویل پروژه (الحاقیه ساخت):

✓ طراحی - مناقصه - اجرا (DBB)

✓ طراحی و اجرا (DB)

✓ مهندسی - تدارکات - اجرا (EPC)

✓ اجرای مستقیم پروژه توسط مالک (S-P)

✓ تحویل یکپارچه پروژه (IDP)

✓ همکاری دولتی - خصوصی (PPM)

✓ و

عوامل اثرگذار بر روش تحویل پروژه (الحاقیه ساخت):

۱. نوع و اندازه چیزی که می خواهد ساخته شود

۲. الزامات و قوانین دولتی و حاکمیتی

۳. کسب و کار اصلی مالک

۴. سطح دانش و ساخت و ساز

۵. زمان اختصاص یافته به پروژه

۶. سایر موارد دیگر...

مقایسه روش های سنتی و یکپارچه تحویل پروژه

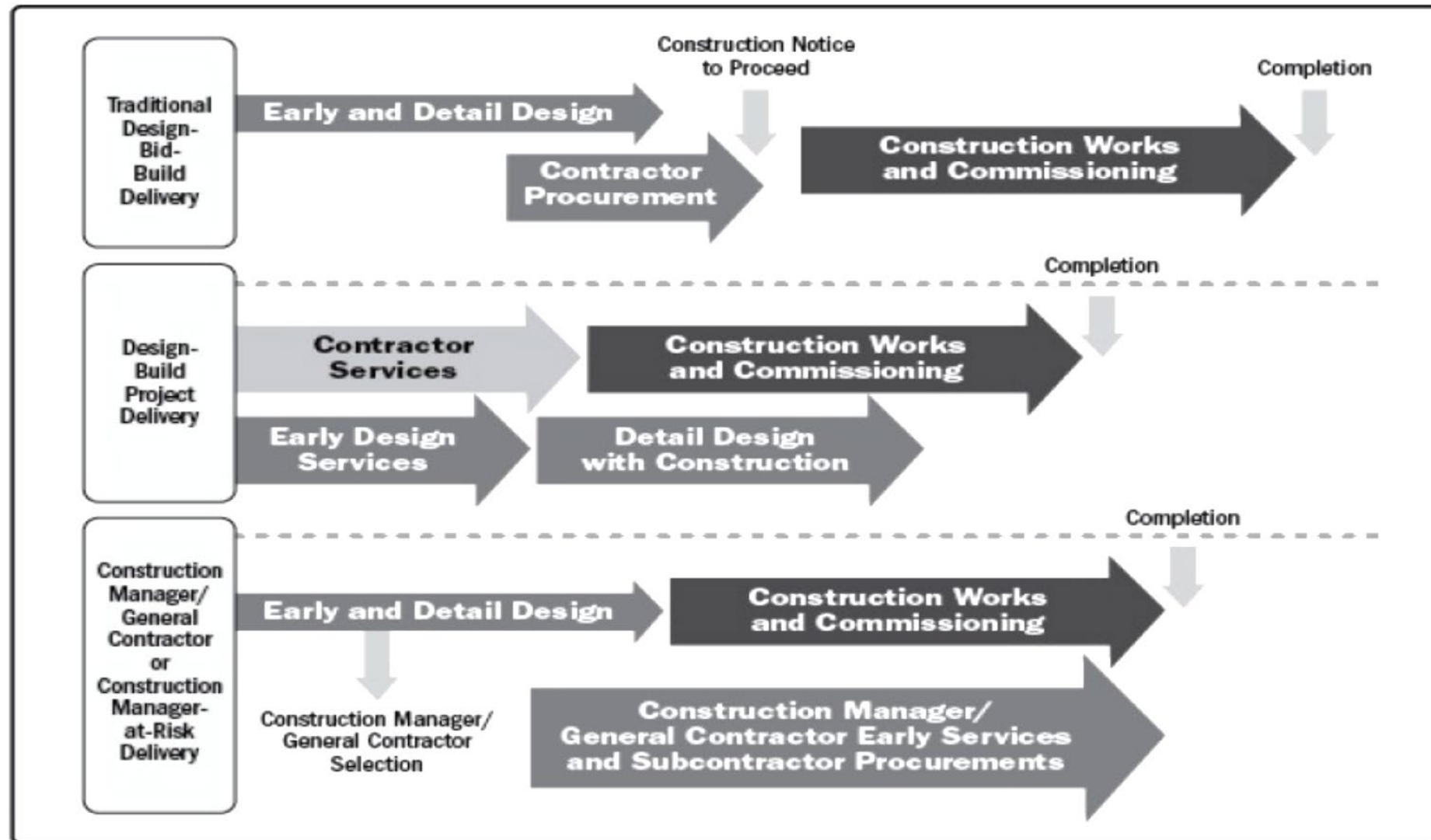


Figure 12-2. Traditional Versus Integrated Project Delivery, D-B, and CM/GC

عوامل اثر گذار بر روش تحویل پروژه (الحاقیه ساخت):

۱. ... که می خواهد ساخته شود

۲. الزامات و قوانین

۳. کسب و کار اصلی مالک

۴. سطح دانش و ساخت و ساز

۵. زمان اختصاص یافته به پروژه

۶. سایر موارد دیگر...

روش تحویل پروژه اثر گذاری مستقیم بر استراتژی عقد قراردادهای پروژه دارد.

مدیریت ارشد سازمان

بخش برنامه ریزی و
کنترل پروژه (یا PMO)

بخش مالی

بخش تدارکات
(Procurement)

بخش فنی

واحد پیمان؟

واحد پیمان؟

واحد پیمان؟

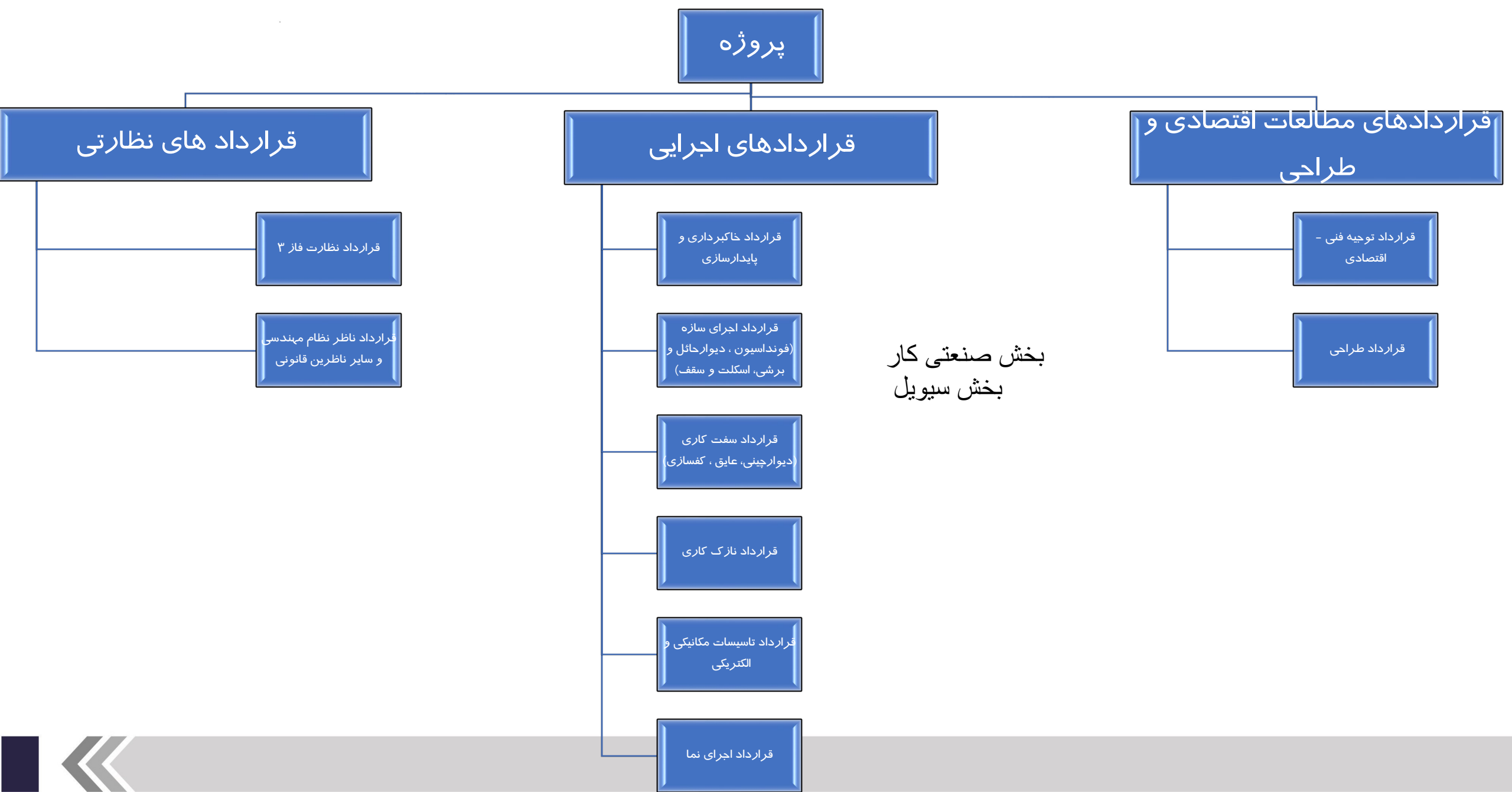
کدام جایگاه و با چه استدلالی برای واحد پیمان مناسب است؟

Contracting strategy describes how the owner will approach the market for these services based on external factors and internal owner capabilities, and generally entails determining who will perform engineering, procurement, and construction, how the contractor will be reimbursed, and what the owner's oversight role and ...



The Construction Playbook, Government Guidance on sourcing and contracting public works projects and programs Version 1, produced by the Cabinet Office and published in December 2020, states:

- 'This is where we define the form of contract informed by the commercial model. This includes:
- 'defining critical risk allocation, and ensuring it is properly reflected in the contract
- 'documenting the decisions made earlier on the contractual roles and responsibilities
- 'defining clearly the rights and obligations of each party and the associated contractual processes required to implement the commercial model, manage the contract and deliver the project



قراردادهای قیمت ثابت و سرجمع

☐

☐ نبود بر آورد دقیق

☐ تغییرات طرح

قراردادهای قیمت واحد یا قابل اندازه گیری

☐

☐ مشخص نبودن آیتم ها

☐ نبود طراحی جامع و کامل

قراردادهای بازپرداخت

☐

☐ دارای انواع مختلف



قراردادهای زمان و مصالح

☐ بازپرداخت براساس زمان سپری شده

☐ بازپرداخت براساس مصالح استفاده شده

قراردادهای انگیزشی

☐ بازپرداخت به صورت انگیزشی در تطابق
با زمان، محدوده، بودجه و

قراردادهای هیبریدی

☐ استفاده از روش های مختلف در یک
مگاپروژه



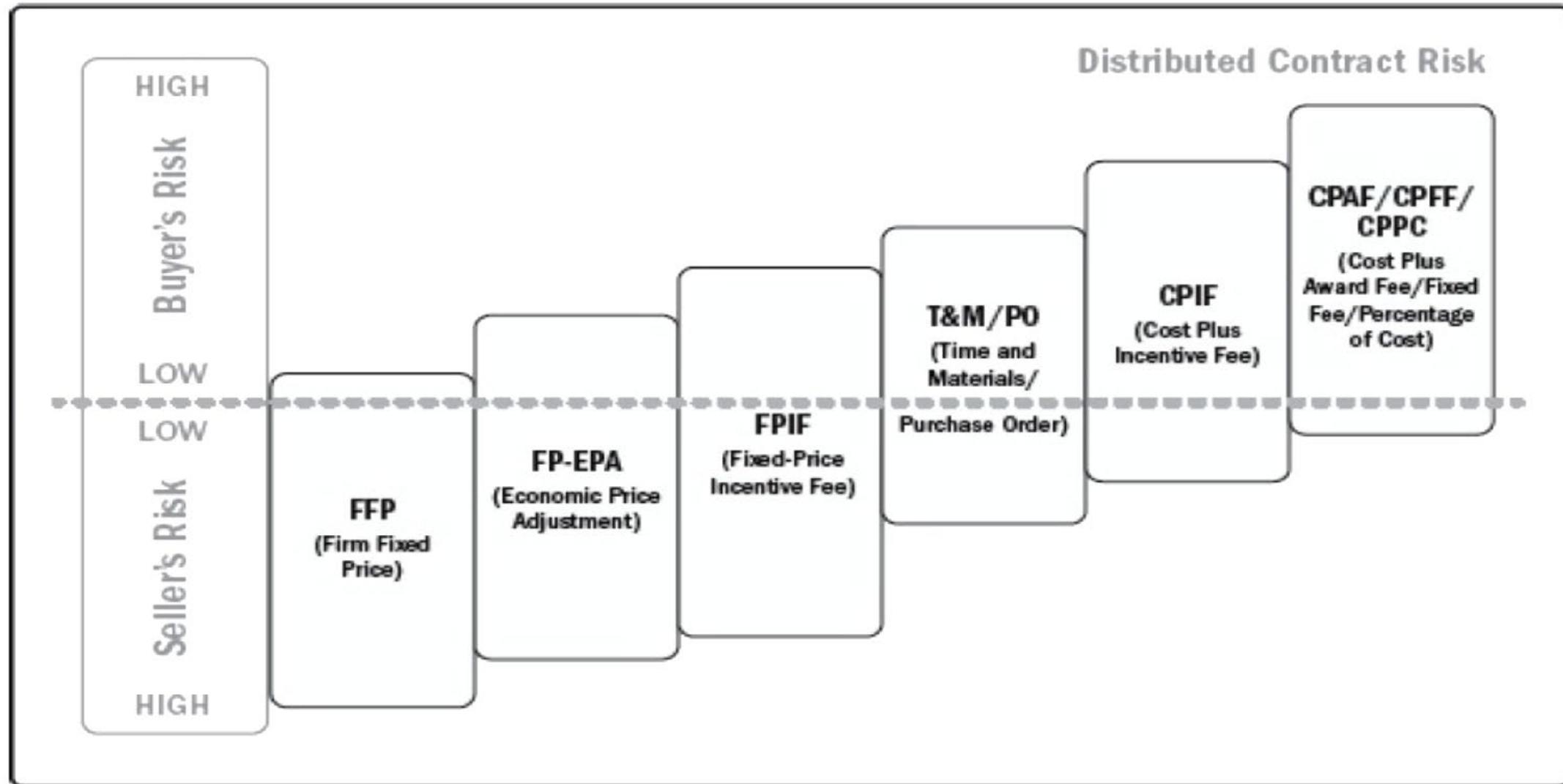


Figure 12-3. Spectrum of Distributed Contract Risk

موارد قابل توجه در برنامه ریزی تدارکات پروژه:

برنامه مدیریت تدارکات



☐ چه چیز

☐ چگونه

☐ چه زمانی باید انجام گیرد

عوامل اثرگذار محیطی



☐ انتخاب روش برون سپاری یا انجام توسط تیم داخلی (in-house یا outsource)

☐ شرایط بازار، زمان حمل، الزامات محلی و ...

☐ ثبات سیاسی ، شرایط اقلیمی و ...

مدیریت زنجیره تدارکات



☐ قیمت مناسب

☐ تکنولوژی پیشرفته

☐ شرایط حمل

موارد قابل توجه در برنامه ریزی تدارکات پروژه:

دارایی های فرآیندی سازمان



فرآیندهای توسعه یافته در سازمان ها ☐

فرایندهای سنتی در شرکتهای کوچک و سنتی ☐

بیانیه محدوده پروژه (Scope)



تشریح استراتژی تدارکات در بیانیه
محدوده پروژه ☐

تشریح دقیق کارهایی که می بایست در
پروژه انجام گیرد ☐

ساختار شکست تدارکات



لزوم درج تدارکات در ساختار شکست
کار ☐

فاز بندی کار ☐

ساختار قراردادی ☐

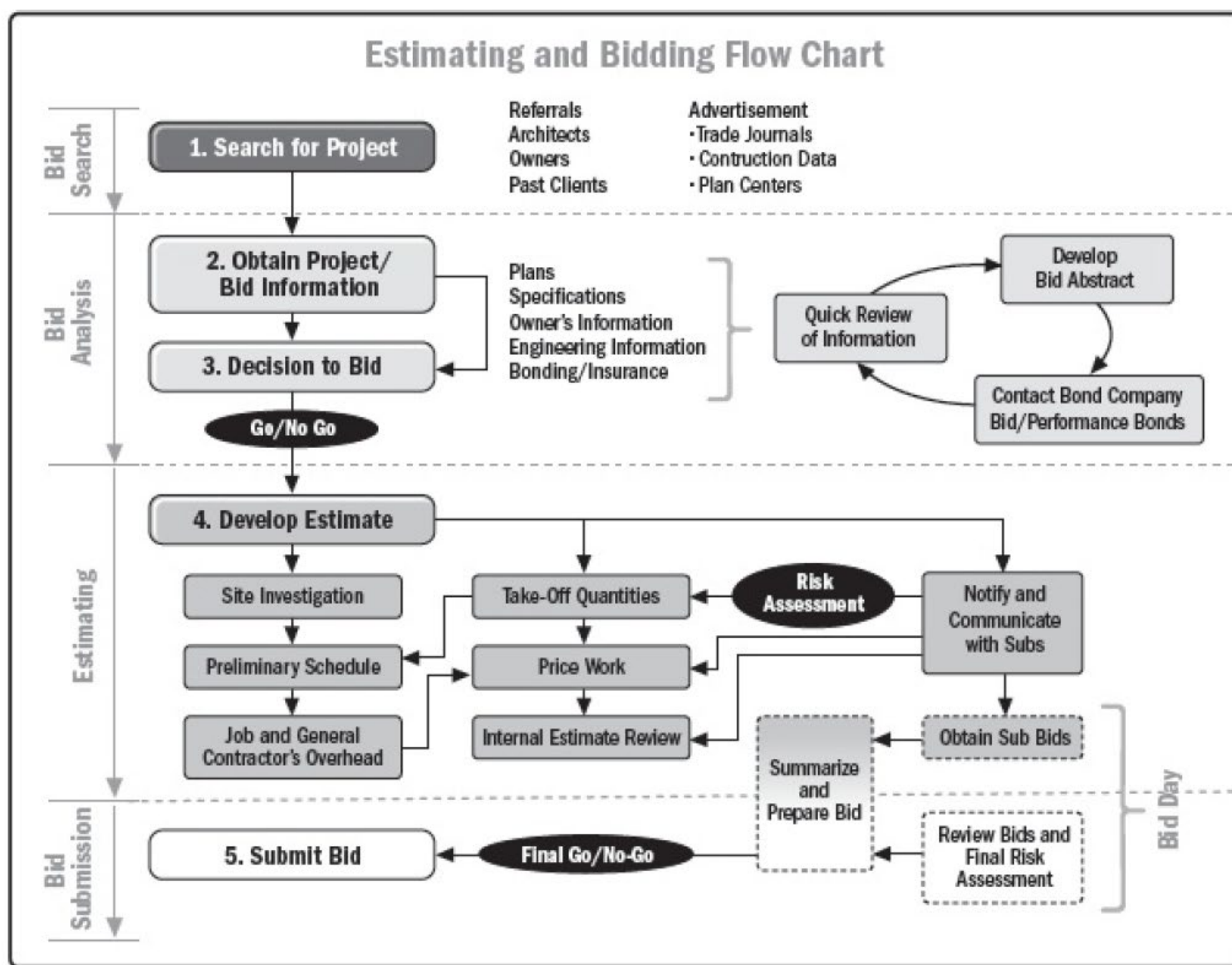
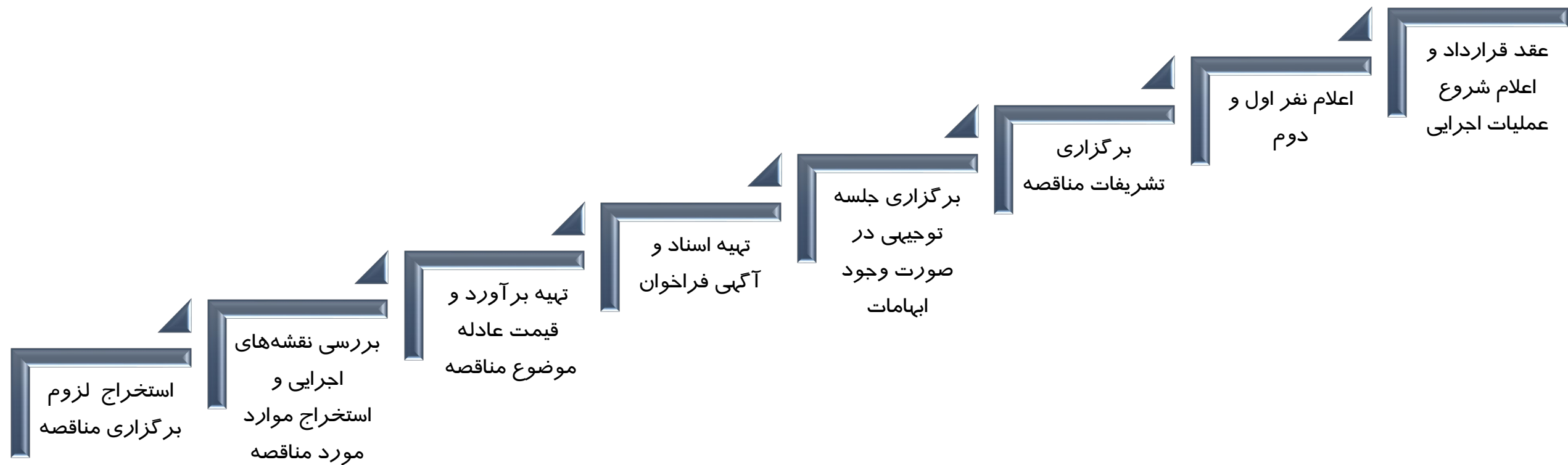


Figure 12-4. Contractor Estimating and Bidding Process



موسسه مهندسی و مدیریت ساخت علوی پور (ACEMI)

دفتر آموزش



تهران، بلوار فردوس شرق، مجتمع آبگینه، طبقه سوم اداری، واحد C42



+۹۸ ۲۱ ۴۶ ۱۰۰ ۴۴۵



+۹۸ ۲۱ ۴۶ ۱۰۰ ۴۵۰



info@dralavipour.com



www.dralavipour.com



@alavipour_pm



@acemi_social



@alavipour_pm



@IRANACEMI

