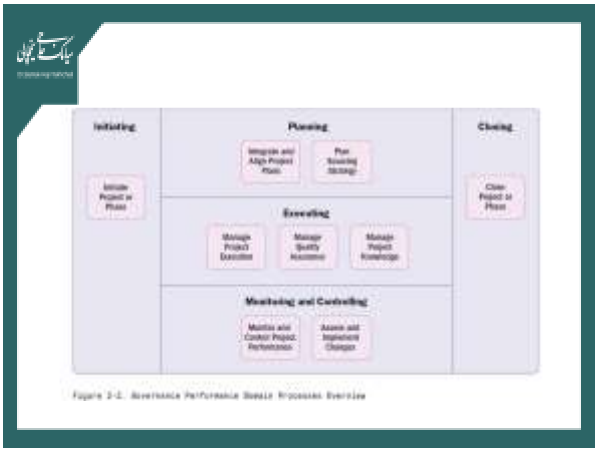
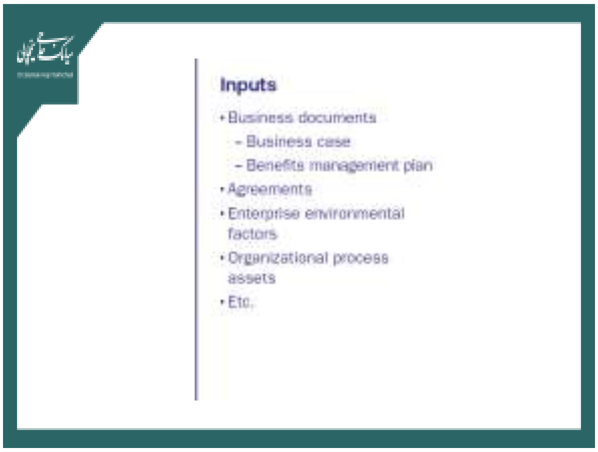
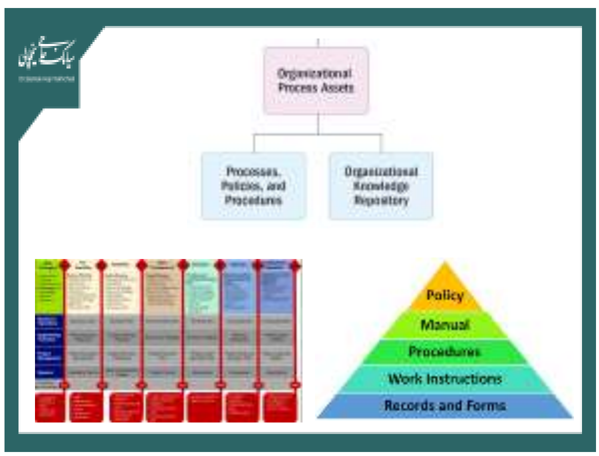
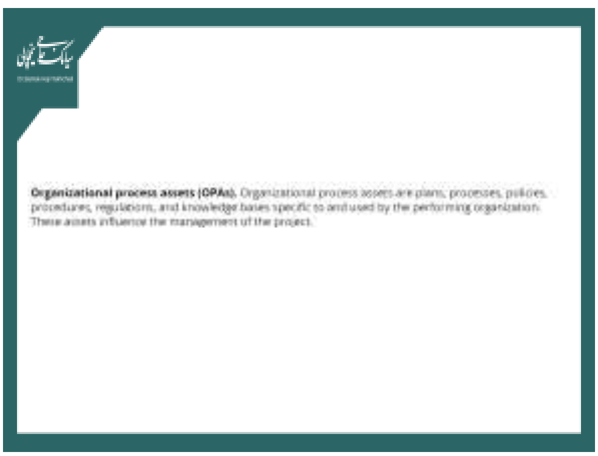

رهنمود جامع النا
دکتر سیامک حاجی یخچالی
عضو هیئت علمی دانشکده فنی دانشگاه تهران
www.DrHajiYakhchali.com


Initiating
Planning
Executing
Monitoring and Controlling
Closing


Initiate Project or Phase
Inputs
Tools & Techniques
Outputs


Inputs
• Business documents
– Business case
– Benefits management plan
• Agreements
• Enterprise environmental factors
• Organizational process assets
• Etc.


Organizational Process Assets
Processes, Policies, and Procedures
Organizational Knowledge Repository
Policy
Manual
Procedures
Work Instructions
Records and Forms


Organizational process assets (OPAs). Organizational process assets are plans, processes, policies, procedures, regulations, and knowledge bases specific to and used by the performing organization. These assets influence the management of the project.

Organizational process asset (OPA) updates. Any OPA can be updated as a result of a process. Updates include plans, processes, and knowledge repositories specific to and used by the performing organization.

The OPAs include any artifact, practice, or knowledge from any or all of the performing organizations involved in the project that can be used to execute or govern the project. The OPAs also include the organization's lessons learned from previous projects and historical information. Additionally, OPAs may include completed schedules, risk data, and earned value data. The OPAs are inputs to many project management processes. Since OPAs are internal to the organization, the project team members may be able to update and add to them as necessary throughout the project. A project's OPAs may be grouped into two categories:

- **Processes, documents, and templates.** Generally, assets in this category are not updated as part of the project work. Processes, documents, and templates are usually established by the project management office (PMO) or another function outside of the project. These assets can be updated only by following the appropriate organizational policies associated with updating them. Some organizations encourage the team to tailor templates, life cycles, and checklists for the project. In these instances, the project management team should tailor those assets to meet the needs of the project.
- **Organizational knowledge repositories.** Assets in this category are updated throughout the project with project information. For example, information on financial performance, lessons learned, performance metrics and issues, and defects are continually updated throughout the project.

Enterprise Environmental Factors

External | Internal

با جذب سرمایه ۲۰ میلیون دلاری؛
بنیان‌گذار تپسی با ARR Prep وارد بازار
جهانی املاک شد

bizagi

EEFs internal to the organization:

- **Organizational culture, structure, and governance.** Examples include vision, mission, values, beliefs, cultural norms, leadership style, hierarchy and authority relationships, organizational style, ethics, codes of conduct, policies, and procedures.
- **Geographic distribution of facilities and resources.** Examples include factory locations and virtual teams.
- **Infrastructure.** Examples include existing facilities, equipment, organizational telecommunications channels, information technology hardware, availability, and capacity.
- **Information technology software.** Examples include scheduling software tools, configuration management systems, web interfaces to other online automated systems, and work authorization systems.
- **Resource availability.** Examples include contracting and purchasing constraints, approved providers and subcontractors, and collaboration agreements.
- **Employee capability.** Examples include existing human resources expertise, skills, competencies, and specialized knowledge.

Enterprise environmental factors (EEFs). Enterprise environmental factors are conditions, not under the immediate control of the team, that influence, constrain, or direct the portfolio, program, or project. These conditions can be internal and/or external to the organization. The EEFs are considered as inputs to many project management processes, specifically for most planning processes. These factors may enhance or constrain project management options. In addition, these factors may have a positive or negative influence on the outcome.

Enterprise environmental factor updates. Enterprise environmental factor (EEF) updates refer to modifications or changes made to the conditions that influence, constrain, or direct a project. These factors can be internal or external to the organization and are not under the control of the project team. Updates to EEFs are important as they can enhance or constrain project management options and have a positive or negative influence on the project's outcome. Understanding and updating EEFs is essential for effective project management.

EEFs external to the organization:

- **Marketplace conditions.** Examples include competitors, market share, brand recognition, and trademarks.
- **Social and cultural influences and issues.** Examples include political climate, codes of conduct, ethics, and perceptions.
- **Legal restrictions.** Examples include country or local laws and regulations related to security, data protection, business conduct, employment, and procurement.
- **Commercial databases.** Examples include benchmarking results, standardized cost estimating data, industry risk study information, and risk databases.
- **Academic research.** Examples include industry studies, publications, and benchmarking results.
- **Government or industry standards.** Examples include regulatory agency regulations and standards related to products, production, environment, quality, and workmanship.
- **Financial considerations.** Examples include currency exchange rates, interest rates, inflation rates, tariffs, and geographic location.
- **Physical environmental elements.** Examples include working conditions and weather constraints.

Business documents. Business documents include the business case and the benefits management plan; they contain information about the project's objectives and how the project will contribute to the business goals. Although both documents are developed prior to the project, they are reviewed periodically.

In some organizations, the business case and benefits management plan are maintained at the program level. The project sponsor is generally accountable for the development and maintenance of the project's business case document. The project manager is responsible for providing recommendations and oversight to keep success measures for the project's business case, project management plan, project charter, and benefits management plan in alignment with one another and with the goals and objectives of the organization.

- Business documents
  - Business case
  - Benefits management plan

- Business documents
  - Business case
  - Benefits management plan

Bankable Feasibility Study (BFS)

pwc Deloitte. EY KPMG

The BIG 4 Accounting Firms

Big 4 Accounting Firms

pwc

Deloitte.

EY
Building a better working world

KPMG

big4accountingfirms.com

Computer Model for Feasibility Analysis and Reporting (COMFAR)

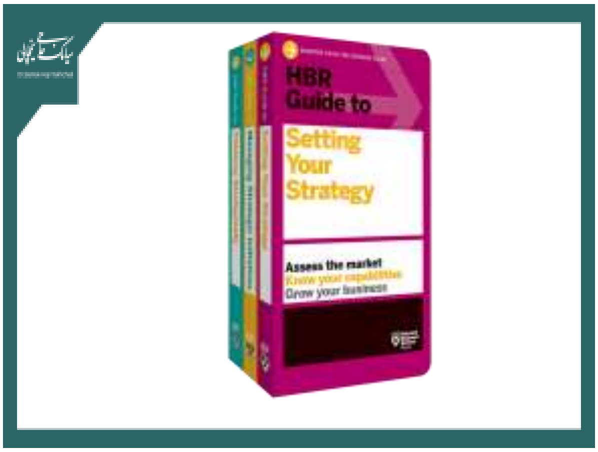
COMFAR

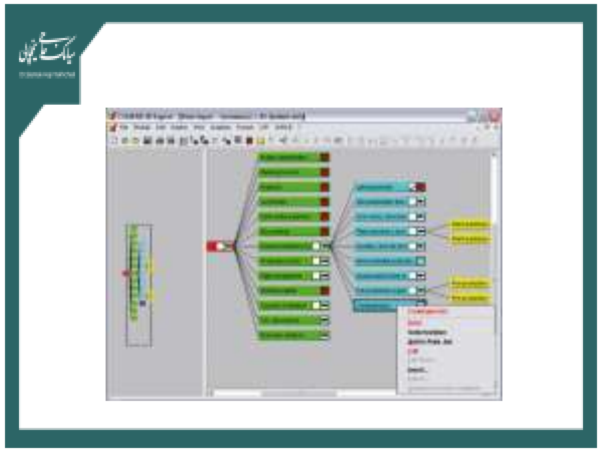
COMFAR

Computer Model for Feasibility Analysis and Reporting (COMFAR)

COMFAR

UNIDO
UNITED NATIONS
INDUSTRIAL DEVELOPMENT ORGANIZATION
Progress by innovation


HBR
Guide to
Setting
Your
Strategy
Assess the market
Know your capabilities
Grow your business




HBR
Guide to
Persuasive
Presentations
Inspire action
Engage the audience
Sell your ideas


HBR
Guide to
Building Your
Business
Case
Tell a compelling story
Identify stakeholders
Analyze risk and return


DOC
XLS
PPT
EBOOK + TOOLS


HBR
Guide to
Better
Business
Writing
Engage readers
Tighten and brighten
Make your case

BUSINESS CASE	
Project name	
Date	
Author	
Approver	
Document Code	
Version	
Executive Summary	
Project Objectives	
Approval	
Date	Name & Signature
Notes	
Revisions	

Business case. A business case is a documented economic feasibility study used to establish validity of the benefits to be delivered by a portfolio component, program, or project. The business case helps to define a selected component that is lacking sufficient explanation and that is used as a basis for the authorization of further project management activities.

The business case lists the objectives and reasons for project initiation. The business case helps to measure project success at the end of the project against the project objectives. The business case is a project business document that is used throughout the project life cycle. The business case may be used before project initiation and may result in a go/no-go decision for the project.

Both the business case and the benefits management plan are developed prior to the project being initiated. Additionally, both documents are referenced after the project has been completed. Therefore, they are considered business documents rather than project documents or components of the project management plan. As appropriate, these business documents may be inputs to some of the processes involved in managing the project, such as developing the project charter.

- Business documents
  - Business case
  - Benefits management plan

Options	
Costs and Benefits	
Duration	
Benefits timescale	
Major risks	
Cost	
Dis - Benefits	
Benefits	
Investment Appraisal	

The data and information that are documented in the business case and needs assessment are used to develop the benefits management plan. The benefits management plan and the project management plan include a description of how the business value resulting from the project becomes part of the organization's ongoing operations, including the metrics to be used. The metrics provide verification of the business value and validation of the project's success.

Development and maintenance of the benefits management plan is an iterative activity. The benefits management plan complements the business case, project charter, and project management plan. The project manager works with the sponsor to ensure that the project charter, project management plan, and benefits management plan remain in alignment throughout the life cycle of the project.

Benefits management plan. The benefits management plan is the documented explanation defining the processes for creating, maximizing, and sustaining the benefits provided by a program or project.

The benefits management plan is the document that describes how and when the benefits of the project will be delivered and the mechanisms that should be in place to measure those benefits. A project benefit is an outcome of actions, behaviors, products, services, or results that provides value to the sponsoring organization as well as to the project's intended beneficiaries. Development of the plan begins early in the project life cycle with the definition of the target benefits. The plan describes key elements of the benefits and may include the following:

- **Target benefits.** The expected tangible and intangible value to be gained by the implementation of the project. Financial value may be expressed as net present value (NPV).
- **Strategic alignment.** The alignment of the project to the business strategies of the organization.
- **Timeframe for realizing benefits.** The length of time to realize benefits, for example, short term, long term, ongoing, or by phase.
- **Benefits owner.** The person accountable for monitoring, recording, and reporting realized benefits throughout the timeframe established in the plan.
- **Metrics.** The direct and indirect measures used to determine the benefits realized.
- **Assumptions.** The factors expected to be in place or to be in evidence.
- **Risks.** The risks that pertain to the realization of benefits.

Inputs

- Business documents
  - Business case
  - Benefits management plan
- Agreements
- Enterprise environmental factors
- Organizational process assets
- Etc.

Both the business case and the benefits management plan are developed prior to the project being initiated. Additionally, both documents are referenced after the project has been completed. Therefore, they are considered business documents rather than project documents or components of the project management plan. As appropriate, these business documents may be inputs to some of the processes involved in managing the project, such as developing the project charter.

Tools & Techniques

- Expert judgment
- Data gathering
  - Brainstorming
  - Focus groups
  - Interviews
- Interpersonal and team skills
  - Conflict management
  - Facilitation
  - Meeting management
- Meetings
- Responsibility assignment matrix
- Project canvas
- Etc.

Agreements. Agreements are any document or communication that defines the initial intentions of a project. These agreements can take the form of a contract, service-level agreement (SLA), memorandum of understanding (MOU), letters of agreement, verbal agreement, purchase order, email, etc.

Agreements can be simple or complex. A complex project may involve multiple contracts simultaneously or in sequence. Agreements should comply with local, national, and international laws regarding contracts.

RACI Chart	Person				
Activity	Ann	Ben	Carlos	Dina	Ed
Define	A	R	I	I	I
Design	I	A	R	C	C
Develop	I	A	R	C	C
Test	A	I	I	R	I

R = Responsible A = Accountable C = Consult I = Inform


DrHajiYakhchali
DrHajiYakhchali.com
Yakhchali@yahoo.com
۰۹۱۲ - ۳۲۰ ۷۵ ۴۷