

SOROH POULTRY

Eat Fresh

Project Name :

Hatchery Expansion Project – 30 Mn Egg Set Annually,
Automation for 100 Mn Egg Set

Group 9

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The supervision by Dr.Waleed Suliman

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1. Introduction

SOROH Company is a local poultry production company that has been producing high-quality products that competitive advantage in the market since ancient times.

As a result, the recommendation was to first acquire the local market before widening into the Middle East market.

The research focused on increasing productivity in order to meet the needs of the internal market while maintaining quality without jeopardizing expected growth.

A group of Everyone's Smart University students conducted this study as a graduation project for year 2021.

Our heartfelt deepest gratitude goes to our "future PMOs," as well as the university administration, for their contributions to the successful completion of this project.

2. Abbreviation

This abbreviation list to help understanding the abbreviations mentioned in this project

PMO	Project Management office
PED	Project Execution Department
C	Current level of engagement
D	Desired level of engagement
BATNA	Best Alternative to negotiated agreement
WATNA	Worst Alternative to negotiated agreement

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5. Mission

SOROH is a poultry production company with a goal of expanding the production process to meet the needs of all residents in Saudi Arabia, as well as all industrial and commercial sectors, with healthy poultry products that meet the international specifications and are slaughtered according to Islamic law using the most advanced science technology.

Ultimately, this project is designed to ensure that SOROH Poultry Company continues to grow by targeting to produce 100 million eggs, up from 70 million last year, which is a 30% increase.

6. Vision

We aim to be the first and only company that is fully independent that distributes poultry products across Saudi Arabia within 5 years. In contrast, reducing the import of chickens and eggs.

As well as, reaching out to new markets in the Middle East by increasing hatching productivity to "8.3 million" per month after acquiring the local market.

Hatcheries are one of the main facilities to support kill volumes and maintain integration levels according to SOROH's expansion strategy and exponential growth in volumes and business, along with other facilities.

7. Objective

- Specific:
 1. New building with specific requirement to accommodate installing new hatchery machines to increase the volume of production by 30%.
 2. Install new machines and upgrades the existing one
 3. Integration system to enable connecting new machines with the existing ones.
 4. Work on importing feed from abroad and relying on the local feed farm to avoid the risks of import interruption.
- Measurable:
 1. 30% increase in volume.
- Achievable:
 1. 8 months' project time.
 2. 30 M per year increase.
 3. Maintain SOROH standard according to SFDA requirements.
- Realistic:
 1. Achieved required volume.
 2. Achieved time duration.
 3. Spent according to budget given.
- Time:
 1. 8 months start to end.

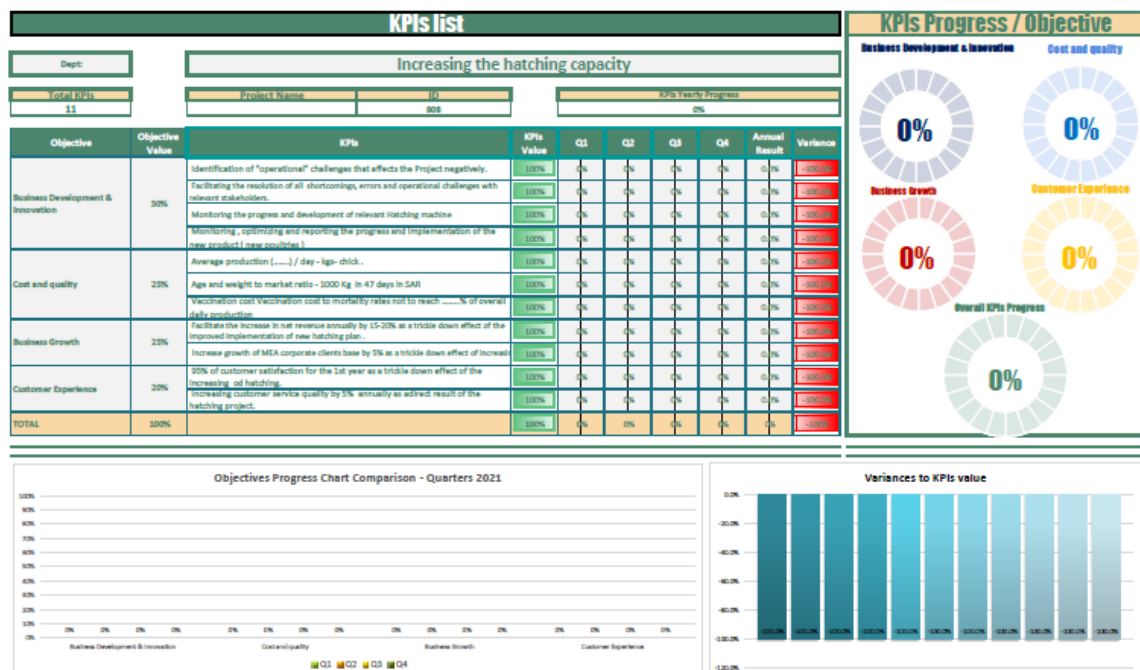
8. Performance Measurement indicators

1. ROI (return on investment).
2. Business financial impact.
3. Business performance measure impact.
4. Milestones completed on time.
5. Milestones completed on budget.
6. Stakeholder perception of value.
7. Stakeholder participation.

- **SOROH KPI's**

Objective	Value	KPIs
Business Development & Innovation	30%	Identification of "operational" challenges that affects the Project negatively.
		Facilitating the resolution of all shortcomings, errors and operational challenges with relevant stakeholders.

		Monitoring the progress and development of relevant Hatching machine
		Monitoring, optimizing and reporting the progress and implementation of the new product (new poultries)
Cost and quality	25%	Average production (2.5Mn) / month - kgs- chick.
		Age and weight to market ratio - 1000 Kg in 47 days in SAR
		Vaccination cost Vaccination cost to mortality rates not to reach 30% of overall daily production
Business Growth	25%	Facilitate the increase in net revenue annually by 15-20% as a trickle-down effect of the improved implementation of new hatching plan.
		Increase growth of MEA corporate clients base by 5% as a trickle-down effect of increasing the expansion
Customer Experience	20%	95% of customer satisfaction for the 1st year as a trickle-down effect of the increasing of hatching.
		Increasing customer service quality by 5% annually as a direct result of the hatching project.



shape (1) - SOROH KPI's

9. Project Charter

BREIF BUSINESS CASE

- To achieve SOROH expansion strategy and provide exponential growth in volumes and business, among other facilities, Hatcheries are one of the main facility to support kills volumes and maintain current levels of integration.
- Overall strategy has been approved by SOROH Board.
- A new hatchery will add 30 million egg sets per year with automation to improve efficiency of the existing hatchery, bringing the total capacity to 100 million egg sets a year.

DELIVERABLES

Successfully implementation and execution of:

- Building construction according to engineering plan with complete suit hatchery.
- Utilities as defined by equipment & automation supplier, detailed engineering design and facility requirements.
- Machine installation with HVAC and hatchery automation as agreed with supplier in order confirmation.
- Project status reports, Weekly updates to working group.

SCOPE DEFINITION

- To implement and execute the project according to detailed engineering drawings & designs (Equipment supplier + Civil and consulting engineer) and required utilities to the plant, once the facility is ready for machine installation, herein after complete the installation of equipment under the supervision of supplier's engineers as per the protocols.
- Automation part is mutually exclusive from Petersime equipment and will be commissioned into existing hatchery.

PROJECT TASK LIST & MILESTONES

SOROH Expansion (30 Mn) & Automation			
#	TASKS	START DATE	DUE DATE
1	Automation Equipment Shipments	01.10.2021	30.1.2022
2	Civil Work	22.11.2021	21.04.2022
3	Floor Tiles to decide, order and laying	01.12.2021	21.04.2022
4	RO Plant Order and Installation	01.12.2021	30.04.2022
5	Water Chiller Order and Installation	01.12.2021	30.04.2022
6	Tanks Order and Installation	01.12.2021	28.02.2022
7	Follow up for Building permits	01.12.2021	31.12.2021
8	Power Supply	15.12.2021	15.01.2022

9	Waste Management (Outside) and connection	01.01.2022	30.04.2022
10	Generator Order and installation	01.01.2022	30.04.2022
11	Drains special arrangement	01.01.2022	30.04.2022
12	Compressor order & install	01.01.2022	30.04.2022
13	Nectra Automation Installation	15.02.2022	31.03.2022
14	Water Line connection to extension area	01.03.2022	31.03.2022
15	Arrange tools for installation	01.03.2022	31.03.2022
16	Petersime equipment's Shipment	15.03.2022	15.05.2022
17	Petersime equipment's Installation	01.04.2022	30.05.2022
18	Project Handover	30.04.2022	30.05.2022

Table (1) – Milestones

ASSUMPTIONS, CONSTRAINTS & DEPENDENCIES

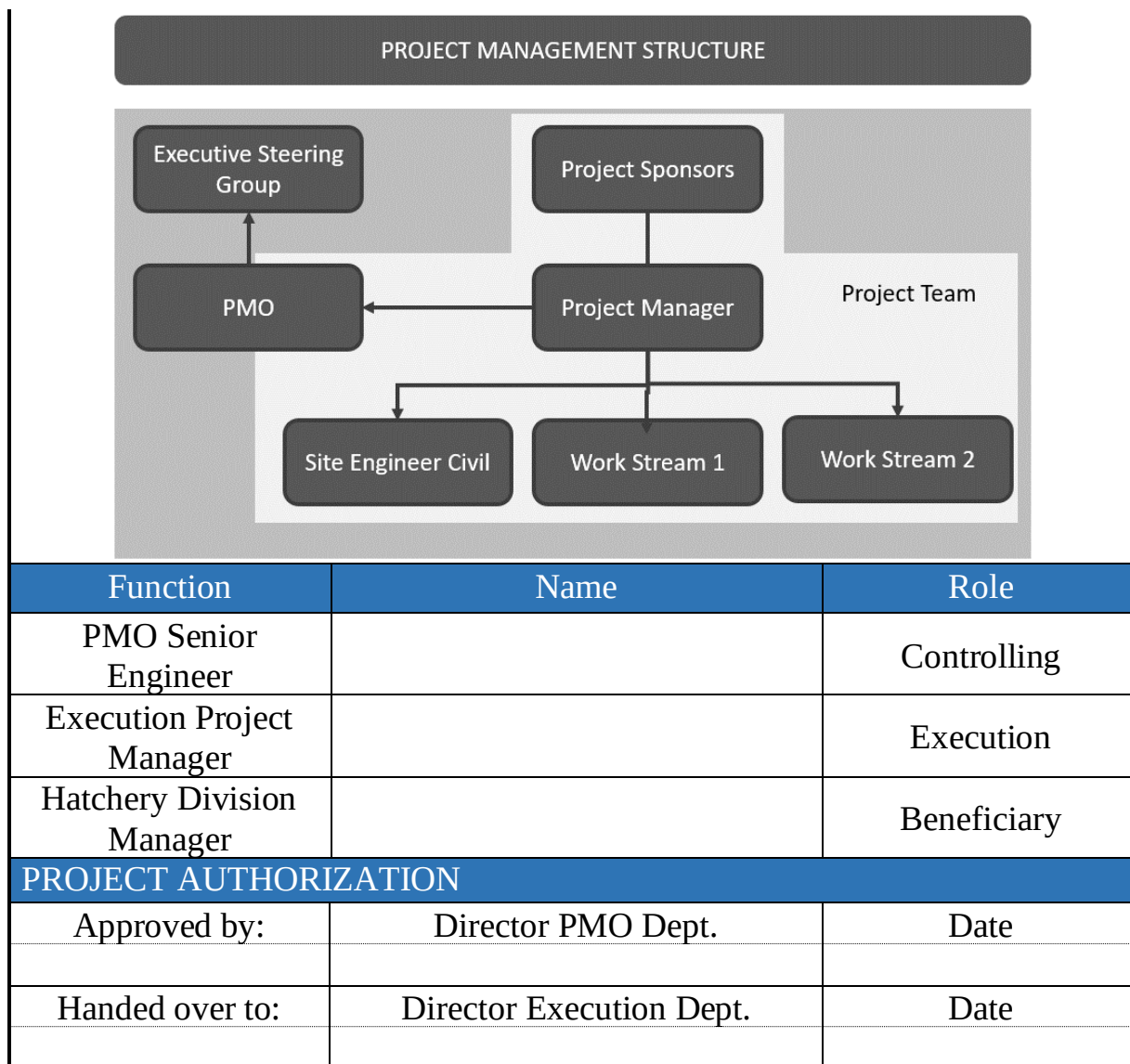
- Project completion within Budget and time frame
- Arrange technical staff for installation
- Consulting with Internal Eng. Department for common utilities
- Permits and Licenses with support service department
- Follow biosecurity protocols applicable at the facility.
- CAR Insurance - Work with PMO
- Follow health & safety protocols
- Consultation with the operations department for matters where it affects internal/external operations.

RELATED DOCUMENTS

Related documents that were used to define scope and assumptions are as follows;

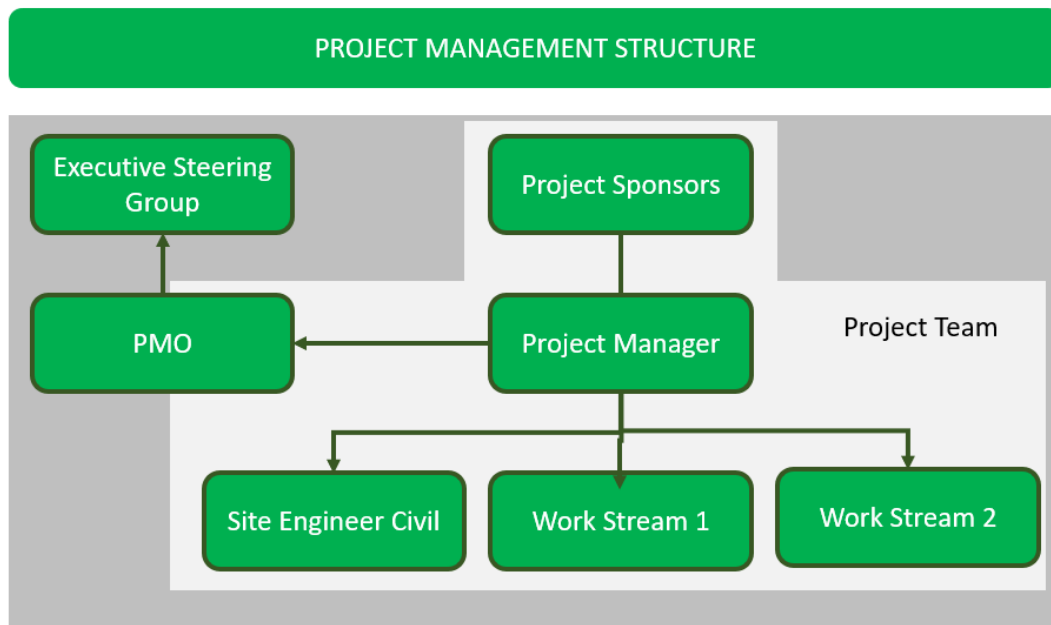
- Approved project budget
- Detailed drawings and designs (Supplier + Civil and consulting Eng.)
- Supplier contract and order confirmation (BOQ, & Eng. details)
- Civil work contract (Petersime + NECTRA)
- Project task breakdown & Completion timeline

PROJECT ORGANIZATIONAL STRUCTURE



10. Project Management Structure

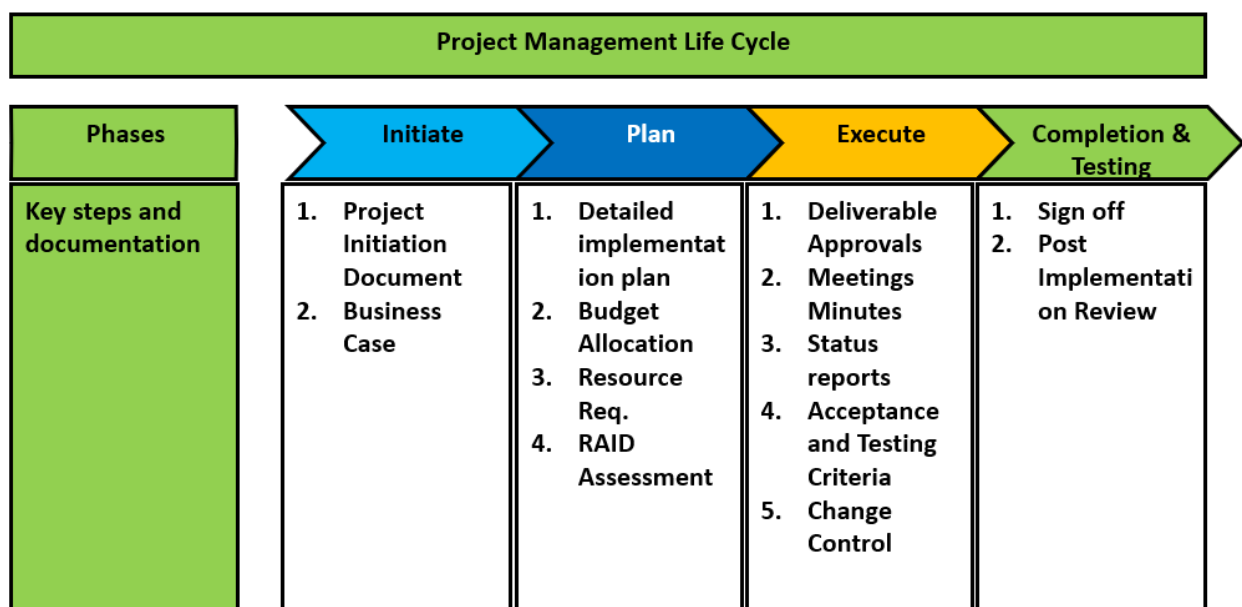
The most appropriate projects office model in this project is controlling model. Due to the decision to implement the project has been taken by PMO based on the company's strategy and because we need to make it linked to existing projects supervised by the Project Management Office and should be integrated with them.



shape (2) – Project Management Structure

II. Project Management lifecycle

All projects should follow the project lifecycle below and must meet the milestones and produce the deliverables listed in each phase before approval can be given to move on to the next phase.



shape (3) – Project Management lifecycle

A. Initiation:

The 'Initiation' phase is where a project becomes formalized with agreed objectives, scope, a high-level plan, and feasibility study.

○ The Project Manager will complete the Project Charter:
○ The PMO and the Proposal Team will support the Project Manager in the completion of the Project Charter as required.
○ The Business Case Template will be co-developed with PMO.
○ The Project Sponsor will present the completed business case to the ESG for approval.

• Documentation Guide:

1. Project Initiation Document / Project Charter (Project Charter will set out the project's):

- Background (including the rationale for the project by summarizing business case).
- Objectives.
- Strategic fit
- Scope.
- Timescale estimate and high-level plan.
- Risks, assumptions, issues, dependencies.
- Stakeholders (including project signatories).
- Specific project governance structure including roles and responsibilities.
- Project deliverables and allocation of delivery responsibility.

2. Business Case Template (The content of the this should include):

- Executive Summary - details the key elements of the business plan that are substantial enough for Senior Executives to understand the major implications of the project
- Strategic Fit - outlines the strategic fit of the proposed change, business need, and scope.
- Options Appraisal - assesses the different options (including a "do nothing" option) and for each assesses the costs, benefits, and risks associated with the implementation options and makes a recommendation on the preferred option.
- Cost-Benefit Analysis - outlines the costs, benefits, and commercial considerations of the preferred solution.

- Performance Metrics – outlines the metrics that will be used to measure the success of the project.
- Achievability - assesses the likelihood of project success and the steps already taken to help achieve this by assessing the following:
 - ✓ Project management and resourcing arrangements.
 - ✓ High-level project plan and key deliverables/milestones.
 - ✓ Risks and mitigation strategies.
 - ✓ Benefits delivery plan.
 - ✓ Key dependencies.

B. Planning:

During the ‘Planning’ phase the Project Manager will create a high-level milestone plan, a detailed project plan (MS Project) which can then be used for assessing the project’s resource requirements.

○ The Project Manager will create a detailed activity-based project plan using MS Project, including start/end dates and effort for each activity, activity inter-dependencies and resource requirements for each activity.
○ This plan will roll-up into a high-level milestone plan for the project which the PMO can consolidate to create a portfolio view of project milestones.
○ The Project Sponsor and the Project Manager will ‘brainstorm’ the potential RAIDs associated with the project and create and populate the project RISKS, ASSUMPTIONS, ISSUES, DEPENDENCIES (RAID) log with this output.
○ The Project Sponsor and the Project Manager will hold a meeting with all stakeholders (or a number of 1:1 meetings) to ensure that all stakeholders support the project and to present/review the RAIDs that have been identified.
○ The Project Manager will communicate the project’s resource requirements to the PMO/BU as early as possible.
○ Budgets will be allocated at this stage.
○ Approval of the ESC.

• Documentation Guide:

1. Detailed plan:

The Detailed Plan should be created using MS Project, should be activity-based, and include resources (either by name or type), start/end date, estimated effort, and any linked tasks against each activity. The tasks within the detailed plan should be broken down into activities of a length that can be reported within the reporting cycle (e.g. activities with approximately 2 weeks’ duration if a fortnightly reporting cycle is in place). The plan will be owned and managed by the Project Manager.

2. High-level milestone plan

3. Project acceptance and testing criteria:

a detailed list of how the project will be completed as finished and the testing criteria. The project acceptance and testing criteria MUST be approved by the PMO and ESC.

4. Raid Assessment:

- The Project Sponsor and the Project Manager should ‘brainstorm’ the RAIDS associated with the project, capture these in the RAID log and ensure there are owners and plans in place to manage/mitigate against them.
- RAID will be a live document with detailed oversight by PMO.

5. End of phase checklist:

- ✓ Has budget been allocated to the project?
- ✓ Is the budget sufficient to support the current plan?
- ✓ Has the detailed project plan been created?
- ✓ Have all key planning assumptions been recorded?
- ✓ Has the plan taken into account all dependent projects within the organization?
- ✓ Has the plan been reviewed and signed-off by the Project Sponsor, and ESC?
- ✓ Have resource requirements (numbers and skillsets) been communicated to PMO/BU PO as early as possible?
- ✓ Are sufficient/suitable resources available within TFG? If not, are there plans in place to resolve this issue?
- ✓ Where appropriate have, the Sponsor been sufficiently involved to date?
- ✓ Are all project RAIDs being actively managed and closed where possible?
- ✓ Is the project’s scope being actively managed via change control?
- ✓ Are the Project Sponsor and PMO being kept closely informed of project status?

C. Execution:

The 'Project Execution' phase is the phase in which the detailed project solution requirements are gathered and used to deliver the project. The project is then checked for testing and deployment.

○ The Project Manager will complete and submit a project status report to the PMO on weekly basis.
○ On a fortnightly basis the PMO/ will meet with all Project Managers and challenge their status reports.
○ The Executive Steering Group will review the status of all 'strategic' projects.
○ The PMO sign off will be required at each stage of Execution.

• Documentation Guide:

1. Deliverable Approval form.

2. Meeting Minutes template.

3. Project Status Report.

4. Project Acceptance and Testing Criteria- see the following sample below:

Ref Number	Area of the project	Acceptance criteria	Criticality (H/M/L)	current	Due Date	Testing Details	Remarks
1.11	Hatchery Expansion	• Documentation • I.T • Performance • Training	High				

Table (2) - Project Acceptance and Testing Criteria

D. Completion of Testing:

In this phase, project will be finally tested for agreed output and acceptance criteria.

○ The Project Team will undertake appropriate testing of the project in order to prove that it meets the requirements and the business' acceptance criteria and is ready for deployment.
○ The PMO sign-off will be required at each stage of testing.
○ The Project Team will undertake an analysis of staff training needs for the new solution and prepare and deliver training sessions as appropriate.
○ This will include the distribution of all relevant materials (e.g. marketing materials for a new product).

- The Project Manager should review and update the project plan as appropriate while the solution is being tested.

- **Documentation Guide:**

- 1. **Final Sign-off**

- the PMO, project manager, and Sponsor must sign off on the project completion.

- 2. **Post Implementation Review.**

- The PMO in consultation with Internal Audit will carry this out within 2 months of the project closure.

- 3. **End of phase checklist:**

- ✓ Does the solution that has been delivered match the solution design?
 - ✓ Has appropriate testing been carried out?
 - ✓ Has the solution successfully met all acceptance criteria to be deployed?
 - ✓ Has the project cost been reviewed and updated to reflect the cost/benefit of the project at completion?
 - ✓ Are all project RAIDs being actively managed and closed where possible?
 - ✓ Is the project's scope being actively managed via change control?
 - ✓ Are the Project Sponsor, PMO kept closely informed of project status?
 - ✓ Have all project documents to date been signed-off and logged in the project repository?
 - ✓ Have all project costs been charged against the project?
 - ✓ Project closure.

- 4. **Project Management Control Processes:**

- **Process Objective:**

- The objective of this process is to enable the PMO to provide the ESC with an accurate and informative fortnightly status report (or weekly where deemed appropriate) of the project's progress against key metrics, without adding a burdensome overhead to the Project Manager.

➤ **Status Reporting:**

A status report provides a record of the current progress of Project deliverables against key milestones. Key milestone/deliverable progress and risks/issues are monitored on a Red/Amber/Green (RAG) basis as defined below.

Status	Project/Deliverable Status	Time	Risks	Issues
Green 	On schedule to deliver on time, within budget and to the agreed scope.	Forecast delivery on or before Baseline date	There are no live high category risks	There are no high category issues, and any medium issues are less than one month old
Amber 	At risk of not meeting time, budget, scope, and quality criteria. Situation can be recovered.	Forecast Delivery later than Baseline but delay recoverable	There are some live high category risks or There are a large number of medium category risk	There are no high category issues, but some issues are more than one month old
Red 	Unlikely to meet all time, budget, scope, and quality criteria. Situation cannot be recovered	Forecast Delivery later than Baseline and not recoverable	There are a large number of live high category risks	There are one or more high category issues or significant issues more than two months old.

Table (3) - RAG (Red/Amber/Green) Status

➤ **Process Detail:**

1. Project Managers will complete a status report template fortnightly and submit this report to PMO.
2. Project Managers are responsible for obtaining information from their Project Team to allow them to complete their fortnightly status report. To this end Project Managers should hold a meeting with their project team weekly or fortnightly. All team members, including the Project Sponsor should attend this meeting.
3. The status report should be discussed with the Project Sponsor on a regular basis (weekly/fortnightly – to be agreed between the Project Manager and Project Sponsor).
4. The PMO will review and challenge this summary report as appropriate (either with the Project Sponsor or directly with the relevant Project Manager) in order to have an accurate and up to date view at the monthly ESC meeting.
5. The PMO and the Project Manager will jointly present this report to the ESC.

➤ **Template:**

The four-key metrics against which status should be reported are:

1. Budget.
2. Milestone/Deliverable completion.
3. RAIDs.
4. Change Requests.

Each of these metrics should be given an overall RAG status as described above and a guideline for the overall status of the project is shown below:

NB: This is only a guideline and flexibility to reflect status outside of these guidelines but the rationale for doing so should be communicated to the PMO.

Project Status	Status Against Key Metrics
RED	• 2+ REDS or • 1+ RED and 2+ AMBERS
AMBER	• 1 RED and 1 AMBER or • 2+ AMBERS
GREEN	• 3+ GREENS • 0 REDS

Table (4) – Project status

The status report template will be used to report project status.

➤ **RAID Management (Risk, Assumption, Issue, Dependency):**

- **Process Objective:**

- The objectives of this process are to provide a standard definition of risk, assumption, issue and dependency, to ensure that all RAIDs are captured as soon after identification as possible and that the impact that they might have on the project is managed closely to mitigate any potential negative impacts to the project.
- This process starts with the identification of a RAID and ends with close management of all RAIDs by the Project Manager and the PMO.
-

- **Definitions:**

- **Risk:**

A risk is defined as a future threat to the overall success of a project or a contingent part. Every risk has an associated likelihood and impact, and therefore severity rating. Risks must be mitigated or accepted. Risks, if realised, become issues.

- **Assumption:**

An assumption is a statement accepted as fact. Assumptions must be validated.

- **Issue:**

An issue is an immediate, formally defined concern that requires action and is impeding the progress of a Work package or the Project, about which no agreement to resolve has been reached.

- **Dependency:**

A dependency is a relationship between products or tasks. For example, one product may be made up of several other 'dependant' products or a task may not begin until a 'dependant' task is complete.

- **Process Detail:**

- All RAIDs should be added to the project RAID log as soon as possible after identification.
- Additionally, the RAID identifier should notify the Project Manager that a new RAID has been raised, immediately if it is likely to be critical to project delivery.
- The Project Manager should review all RAIDs at least weekly to ensure they are clear and complete and to allocate ownership of each one to an individual.
- The RAID log and progress against each one should be reviewed as part of the Project Team meeting.
- The Project Manager should immediately escalate to the Project Sponsor any issues that he is unable to deal with within the Project Team.
- The central PMO will track progress of any critical RAIDs as well as any that might have a cross-project impact.

➤ **Deliverable review & SIGN-OFF:**

- **Process Objective:**

- The objective of this process is to ensure that each project has a process by which all appropriate resources have the time and opportunity to contribute to or comment on all deliverables before they are signed-off.
- This process starts with the identification and agreement of project deliverables and ends with the logging of all signed-off deliverables and evidence of sign-off.

- **Definitions:**

- **Sign-off:**

- Formal sign-off provides a record of agreement to a deliverable. As far as the Project is concerned, a deliverable is not complete until it has been accepted through this process. And The Project Manager is responsible for owning and managing a deliverables log which lists all project deliverables (as per the signed-off PID/Project Charter), deliverable owners, expected completion dates and all required reviewers and signatories.

- **Process Detail:**

- PMO is responsible for notifying the reviewers and signatories of the intended review timeline (and any changes to this), circulating the deliverable to this community and arranging a forum to review this (potentially a review workshop).
 - The signed-off deliverable and evidence of sign-off should then be given to the PMO who will store these documents in the project repository.
 - All deliverables should be signed off as Version 1.0 and placed under change control.

➤ **Budget management:**

- **Process Objective:**

- The objectives of this process are to enable a Project Sponsor/Manager to obtain budget for a project, to make approved amendments to this budget in accordance with accepted CRs and to ensure this budget is tightly managed throughout the project lifecycle.
 - This process starts with approval of budget for a project and ends with the closure of the project and the budget.

- **Process Detail:**

- The Project Sponsor is accountable for the budget, although he may give day-to-day management responsibility for this to the Project Manager.
 - The Project Sponsor and Project Manager should agree boundaries within which the Project Manager can make financial decisions without agreement from the Project Sponsor.
 - The Project Manager should track progress against project budget on a weekly basis, ensuring that the Project Team communicate any costs incurred on a weekly basis.

➤ **Change control:**

- **Process Objective:**

- The objectives of this process are to control how potential changes within the project will be identified, assessed, and approved or declined for implementation.
- This process starts with the identification of a potential change within the project and ends with the approval or rejection of this change.

- **Definitions:**

- Change control within the context of a project relates to control of the main documents of the project. These documents include (but are not limited to):
 - Documents which describe scope, requirements, or solution design.
 - Documents that are final deliverables, such as organisation structures, process definitions, procedure manuals and training documentation.

- **Process Detail:**

- The Project Manager is responsible for owning and managing a Project Change Request Log.
- PMO will challenge all changes to the project.
- Any member of the project team can raise a Change Request (CR) by completing a CR form and submitting it to the Project Manager.
- Keeping budget and other timelines in mind, the Project Sponsor will approve the CRs.
- The CR Log will be reviewed as part of all regular team meeting to understand the status of all CRs and its impact.

12. Stakeholder Register

SOROH FOODS COMPANY
Project Execution Department
Rev.01

Stakeholder Register

Project Title: SOROH Hatchery Exoansion Project

	NAME	COMPANY	POSITION	EMAIL	Phone Number
PED					
	Ahmad Alasmari	SOROH	Senior Tech. Engineer	ahmed.alasmari@soroh.com	534444739
	Fayez Al Dossary	SOROH	Project Manager	fayez.aldossary@soroh.com	501701158
	Rabie Radwan	SOROH	Project Engineer - Civil	rabie.radwan@soroh.com	536074592
	Haitham Al Dhalan	SOROH	Project Engineer - Mechanical	haitham.aldhalan@soroh.com	553333555
	Mohamed Abdelrahman	SOROH	Project Engineer - Electrical	mohamed.abdelrahman@soroh.com	557011653
PMO					
	Muhammad Banafa	SOROH	Project Engineer	muhammad.banafa@soroh.com	568357455
	Maya Manasefi	SOROH	Proejct Engineer	maya.manasefi@soroh.com	546363459
	Meshari Alghamdi	SOROH	Project Engineer	meshari.alghamdi@soroh.com	567143042
Hatchery - End User					
	Mudallal Khaled	SOROH	Hatchery Manager	mudallah.khaled@soroh.com	558860332
SUPPLIER					
	Lea Philip	Nectra	Project Manager		
	Vincent Van Der Beken	Petersime	Project Manager		
CONTRACTOR					
	Mohammed Abu Zinah	Crover	Project Manager		

Table (5) – Stakeholder Register

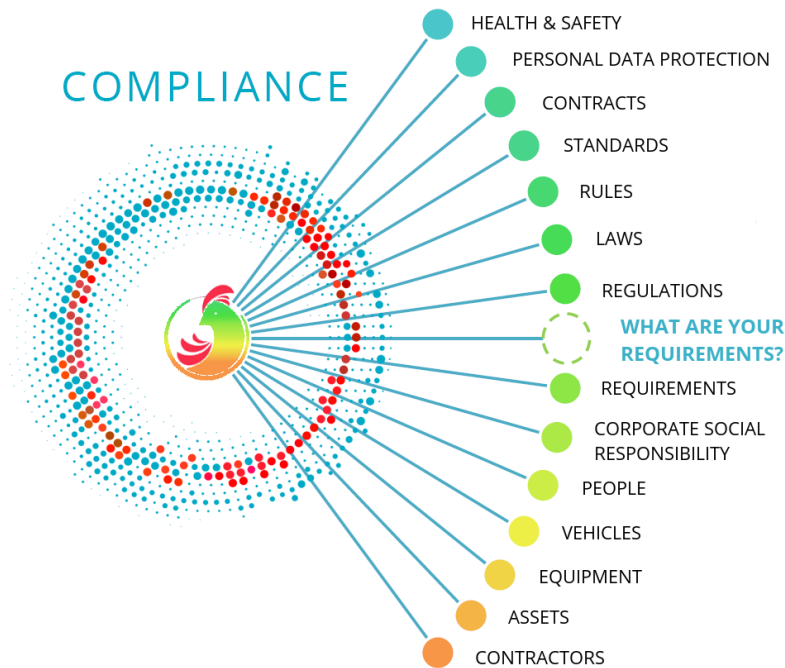
13. RACI table for Project Management

Sr. #	PM Stages	Deliverable/ Task	PMO	PED	User Dept.	Other Depts.
1	Initiation	Conversion of Business Plan into Projects	A & R			
		Development of 5 Year Projects Plan	A & R	Consultation	Consultation	
		Project Feasibility Plan	A & R			
		Project Budgeting	A & R	Consultation		
		Project Charter	A & R	Consultation	Consultation	
2	Planning	Development of Detailed Budget	A & R	Consultation	Consultation	
		Site approvals / Legal Documentation	Consultation	Information		A&R Support Svc.
		Selection of Contractors/Suppliers	Consultation	A & R	Information	Proc. Dept
		Selection of Equipment & Machinery	Consultation	A & R	Consultation	Proc. Dept
		Preparation of Contracts /Agreements	A & R	Consultation		A&R Legal Dept.
		Procurement Planning	Consultation	A & R		Proc. Dept
3	Execution	Project Scheduling	Consultation	A & R	Information	
		Creation of PRs			A & R	
		Creation of POs, Procurement of Equip. & Mach.	Information	Information		A&R Proc. Dept.
4	Monitoring & Control	PM of Civil, Mechanical & Electrical Work	Information	A & R		
		Project Monitoring wrt Cost & Schedule	Responsible	Accountable		
5	Closure	Handing over of completed Project to Operations	Information	Accountable	Responsible	

Legends	
Accountable & Responsible (A & R)	
Accountable (A)	
Consultation (C)	
Responsible (R)	
Information (I)	

Table (6) – RACI TABLE FOR PROJECT MANAGEMENT

14. Compliance Module



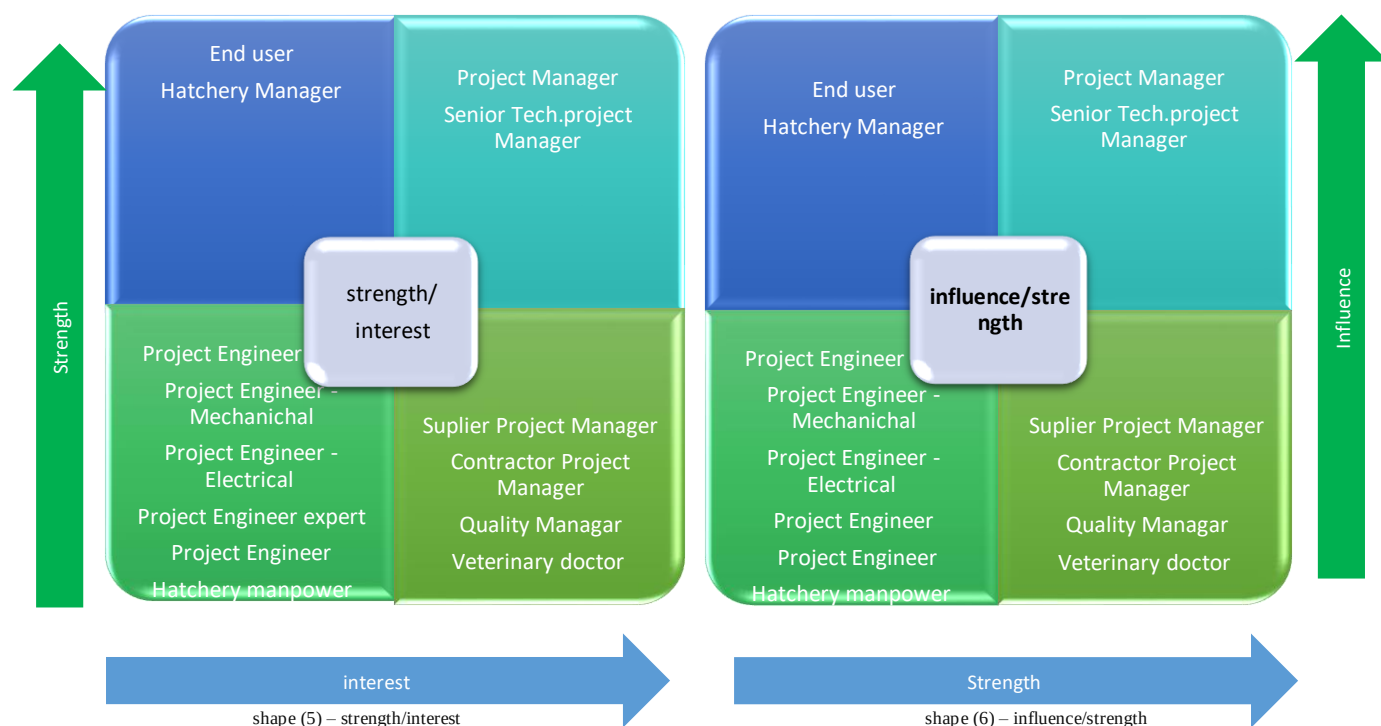
shape (4) – Compliance SOROH Project

15. Project Checklist

	PROJECT:	PROJECT CHECKLIST	Projected Date	Actual Date
1	Define project scope			
2	Client authorize engineering			
3	Initial client/engineer conference			
4	Soil borings, test drilling, subsurface investigation			
5	Committee meeting/refine project scope			
6	Final plans an specifications			
7	Engineering report (summary of work)			
8	proposal and bid documents			
9	Approval from client for final plans/specifications			
10	Submit plans/specifications to regulatory			
11	Department of Environment and Conservation			
12	Minutes, bid tabulation, proposal analysis			
13	Construction Contract Document final preparation			
14	Shop drawing review			
15	Contractor payment requests review			
16	Inspection and certification			
17	Preparation of construction record drawings (as-builts)			
18	Final payment request review and certification			

Table (7) – Project checklist

16. (Strength/Interest) & (Influence/Strength)

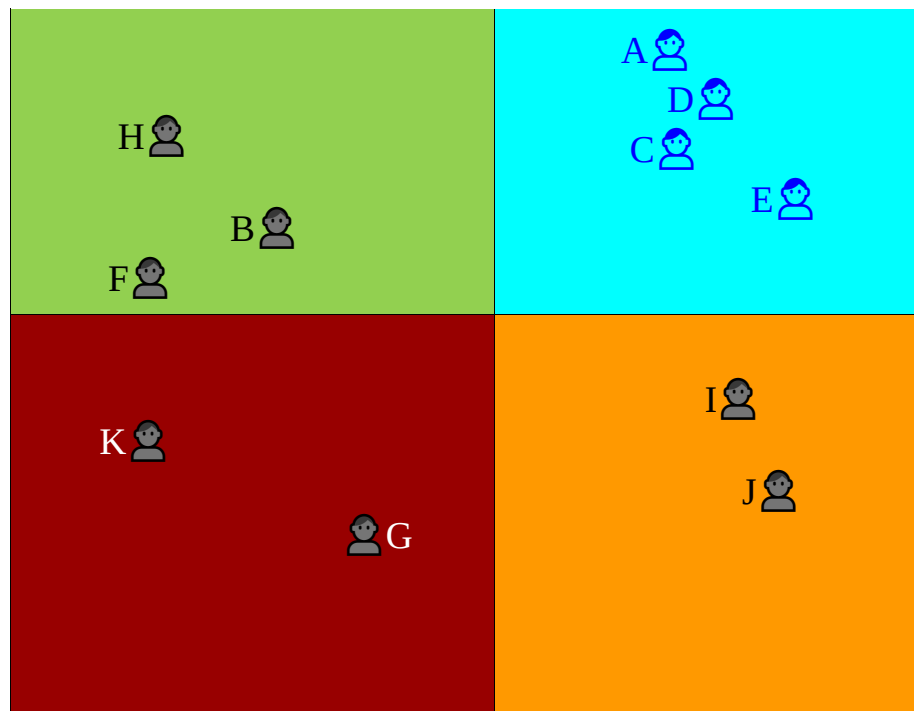


17. Logical Diagram for stake holder register

	stakeholder	position	power	interest
A	Ahmad Alasmari	senior tech project manager		
B	Fayez Al Dossary	project manager		
C	Rabie Radwan	project engineer civil		
D	Haitham Al Dhalan	project engineer mechanical		
E	Mohamed Abdelrahman	project engineer electrical		
F	Muhammad Banafa	project engineer		
G	Maya Manasefi	project engineer		
H	Mudallalah Khaled	hatchery manager		
I	Lea Philip	project manager		
j	Vincent van der beken	project manager		
k	Mohammed abu zinah	project manager		

Table (8) – stake holder logic diagram

Power



Interest

shape (7) – stake holder logic diagram

18. Organizational Culture

One cultural dimension may shape an organization's culture more than the others, influencing the organization's personality and the way its members work.

- SOROH is embracing a change management attitude in order for SOROH POULTRY initiatives to benefit from an innovative culture. Accepting change allows everyone involved to think differently and creatively.
- SOROH poultry must aim to build a culture that supports innovation and other improvements that increase welfare and efficiencies in poultry production and processing in order to succeed in an ever-changing world.
- SAOROH culture places a greater emphasis on instilling a sense of freedom in everyone engaged to think in new, creative, and unconventional ways.

The chart below depicts SOROH's internal culture.



19. Proposals of the organization values

- **Proposed Solution:**

A project team will assemble initial data and select and implement all initial tools and data structures. This will allow for the project team to focus on the hard and soft tools needed to further develop project management delivery rigor and discipline throughout the organization.

- **Alternatives Considered:**

Minimum infrastructure: to start with one senior project manager, no formal PMO, and no tools. This alternative was eliminated because an optimistic estimate of the amount of work required is several person-years. SOROH cannot afford to wait that long for the results (8 months to close the project and start operation). Also, three members of the executive committee were involved in the assessment of capital investment for tools. They concluded that such tools are 100% vital to linking project progress to the achievement of enterprise goals.

- **Assumptions:**

- The project will follow the PMO project guidelines, including using a standard PMO Tool Suite as the project management tool.
- PMO Tool functionality will drive certain project processes.
- Project completion is within Budget.

- Stick to the project timeline.
 - Arrange technical staff for installation.
 - Consulting with the Internal Eng. department for common utilities.
 - Permits and Licenses with the support service department.
 - Follow biosecurity protocols applicable to the facility.
 - CAR Insurance.
 - Follow health & safety protocols.
 - Consultation with the operations department for matters where it affects existing operations.
- **Obstacles:**
 - Finding qualified resources to support the project.
 - Defining the best way to incorporate every business unit's needs without sacrificing the need for a common structure.

20. Behaviors of that can influence on the project

1. Level of Engagement:

Engaging team members in a project is critical to its success. However, this too depends on the nature of employees in your team. Every person has a unique personality and different ways of engaging with people.

It's possible that they don't feel comfortable with the level of input you want from them. Other times, they may engage much more than others, and even speak over some team members. Therefore, project managers must balance both sides of the coin effectively.

How to improve and eliminate these issues:

- It is extremely important for project managers to lay the groundwork to engage team members and stakeholders. This will help them maintain a good relationship with all members and stakeholders in both the short and the long term.
- You must monitor the level of engagement of individual team members across the life cycle of the project.
- You should also address their emotional and personal expectations to bring about their best performance.
- These issues yourself, it would be extremely difficult to create a good working environment among your team. Consequently, it would affect the performance of your team and make it harder for them to achieve the targets you set for them.

2. Level of Motivation:

Each one of us is driven by our emotions. While we expect people to keep their emotions at bay in a professional environment, it can be hard for people to do that on certain occasions. The reason is that our emotions have a huge effect on our level of motivation.

A person's level of motivation is directly proportional to how successful they will be in tackling challenges head-on and overcoming the adversities they face. Regardless of how talented people are, it's difficult for them to work in an environment where they don't feel motivated.

How to improve and eliminate these issues:

- Keeping the team motivated has always been a long-standing challenge for most project managers. Therefore, to be a good project manager, you should:
- have the expertise to manage both the technical and the emotional aspects of your team.
- Negligence in this matter can also cause a high performing and strongly skilled employee to exhibit negative attitudes due to their lack of motivation.
- If Project Manager does not manage both factors simultaneously, this will delay important projects that will end up costing much higher than expected.

3. Communication:

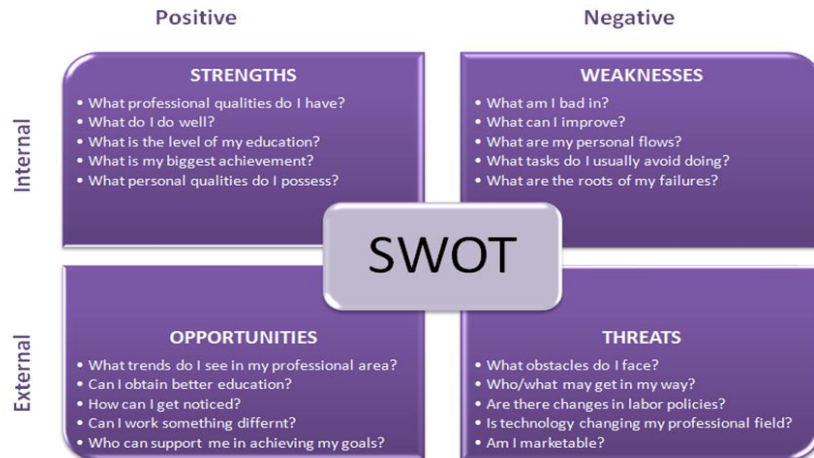
The greatest challenge for managers is how to communicate what they want from their team. During a project, there are hundreds of open communication channels between project team members and stakeholders.

In this extensive exchange of information, it can be extremely difficult for people to avoid confusion. Therefore, it is extremely important to identify which of these channels yield positive and fruitful interactions.

To eliminate:

- project managers to establish a conducive environment for nurturing positive change.
- Create interactions between team members.
- Doing so clears out any confusion and allows your team to work in cohesion and produce better results.
- Proficient project management is no easy feat, especially if you're working with a complex team of individuals, and firefighting problems to keep the project on track. However, if you manage your team effectively, you can transform your team into your greatest strength.

21. SWOT Model



shape (9) – SWOT Model

- **Strength:**
 - Our team is professional and qualified.
 - Teamwork is strong.
- **Opportunities:**
 - The team will gain new exposure with this project.
- **Weakness:**
 - Some of the members consider the field of operation is new for them.
- **Threats:**
 - The sense of other departments of urgency is absent.
 - Finance is not paying contractors on time.

22. Behaviors contradict the moral integrity

1. No Trust in you or your work.
2. Inappropriate behaviors toward you or to any one of the team members.
3. there is no commitment, especially to reward the team.



shape (10) – Business Ethics

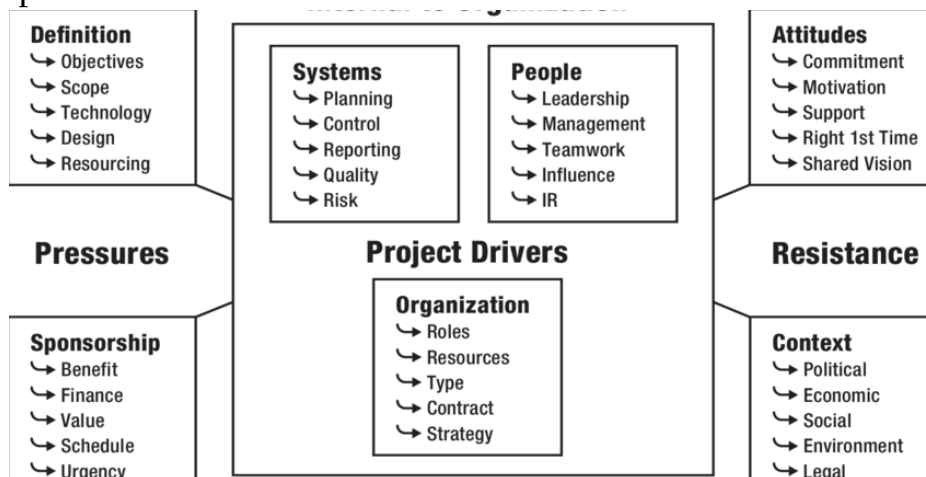
23. Analyze the financial, social, and technical influence

- **Financial:** Financial: always apply pressure to any project. Then you should not exceed the budget that has been allocated and /or approved. Sometimes, you should record how much each process cost you and how and where you spent it.
- **Social:** how the project will have a positive impact to social media, and how this social channel will support this project or may affect it negatively, such as:
 1. Enhancement of health and environment.
 2. Support and promotion of environmentally friendly practices.



shape (11) – Social influence

- **Technical:** you should have technical manpower and experts to help you with the project. Sometimes, you will have some obstacles, and these obstacles can be resolved by those experts.



shape (12) – technical influence

24. Register of the stakeholder:

SOROH FOODS COMPANY
Project Execution Department
Rev.01

Stakeholder Register

Project Title: SOROH Hatchery Exoansion Project

	NAME	COMPANY	POSITION	EMAIL	Phone Number
PED					
	Ahmad Alasmari	SOROH	Senior Tech. Engineer	ahmed.alasmari@soroh.com	594444739
	Fayez Al Dossary	SOROH	Project Manager	Fayez.aldossary@soroh.com	501701158
	Rabie Radwan	SOROH	Project Engineer - Civil	rabie.radwan@soroh.com	536074532
	Haitham Al Dhalan	SOROH	Project Engineer - Mechanical	haitham.aldhalan@soroh.com	553339555
	Mohamed Abdelrahman	SOROH	Project Engineer - Electrical	mohamed.abdelrahman@soroh.com	55701653
PMO					
	Muhammad Banafa	SOROH	Project Engineer	muhammad.banafa@soroh.com	568357455
	Maya Manasefi	SOROH	Proeject Engineer	maya.manasefi@soroh.com	546963459
	Meshari Alghamdi	SOROH	Project Engineer	meshari.alghamdi@soroh.com	567143042
Hatchery - End User					
	Mudallalah Khaled	SOROH	Hatchery Manager	mudallah.khaled@soroh.com	558860332
SUPPLIER					
	Lea Phillip	Nectra	Project Manager		
	Vincent Van Der Beken	Petersime	Project Manager		
CONTRACTOR					
	Mohammed Abu Zinah	Crover	Project Manager		

Table (9) – stake holder register

25. Personal communications and the effective communications:

- **Definition of personal communication:**

The exchange of information between people. Personal Communications include private letters, memos, emails, personal interviews, telephone conversations, and similar resources.

- **Definition of effective communication:**

Delivering the right information in the right format to the right person at the right time.

- **Shapes, models, and channels of personal communication:**

There are several different ways we share information with one another. For example, you might use verbal communication when sharing a presentation with a group. You might use written communication when applying for a job or sending an email. Here's a more in-depth look at the four main categories of communication:

1. **Verbal:**

Verbal communication is the use of language to transfer information through speaking or sign language. It is one of the most common types, often used during presentations, video conferences and phone calls, meetings, and one-on-one conversations.

2. **Nonverbal:**

Nonverbal communication is the use of body language, gestures, and facial expressions to convey information to others. It can be used both intentionally and

unintentionally. For example, you might smile unintentionally when you hear a pleasing or enjoyable idea or piece of information. Nonverbal communication is helpful when trying to understand others' thoughts and feelings.

3. Written:

Written communication is the act of writing, typing or printing symbols like letters and numbers to convey information. It is helpful because it provides a record of information for reference. Writing is commonly used to share information through books, pamphlets, blogs, letters, memos and more. Emails and chats are a common form of written communication in the workplace.

4. Visual:

Visual communication is the act of using photographs, art, drawings, sketches, charts, and graphs to convey information. Visuals are often used as an aid during presentations to provide helpful context alongside written and/or verbal communication. Because people have different learning styles, visual communication might be more helpful for some to consume ideas and information.

26. Communication Matrix /three scenarios for wrong communication

Communication Matrix

Baseline End Date Dd/mm/yyyy	PURPOSE	MEDIUM	FREQUENCY	AUDIENCE	OWNER	DELIVERABLE
Kickoff Meeting	Introduce project. Review objectives and goals.	In person / Face-to-face	Once	Project team Project sponsor Stakeholders	Project manager	Agenda
Project Team Meetings	Review status of project	Face-to-face or Conference call	Weekly	Project team	Project manager	Agenda Project schedule
Technical & Creative Design Meetings	Discuss, review technical & design problems and solutions.	In person / Face-to-face	As needed	Technical team Creative team	Technical lead Creative lead	Agenda
Monthly Project Status Meetings	Update leadership on project status.	Face-to-face or Conference call	Monthly	Project manager Stakeholders	Project manager	Slide presentation Project schedule
Project Status Reports	Detailed report on project status including progress, costs, and problems.	Email	Monthly	Project manager Stakeholders	Project manager	Project status report Project schedule

Table (10) – Communication Matrix

Communication is one of the most important means used in projects and has a role in their success. The project manager spends most of his time in communication with project stakeholders, but if it is used incorrectly, it will become one of the obstacles to the success of the project. In SOROH Company, some made mistakes that made the communication process unsuccessful sometimes.

- Initially, the project manager was unable to communicate with all the stakeholders because he did not collect enough information about them, as he did not have all the email

addresses of each of them. So when he arranged a meeting, the meeting was incomplete. Some managers did not receive the mail containing the meeting link. This was a mistake. It has the effect of wasting some time because not enough information was collected about each of them.

- The hatchery manager sent reports by fax in Arabic to one of the foreign managers. This error made the manager not understand the content of this message.
- A meeting was arranged between all members of the organization and the link of the meeting was sent to all members of the organization, but the message was incomplete. The sender did not specify the date in the message. This made the members not know when the meeting would take place.

27. stakeholder assessment matrix

Stakeholders	Unaware	Resistant	Neutral	Supportive	Leading
PED				DC	
PMO				C	D
Hatchery – End User			DC		
Supplier		C		D	
Contractor		C		D	

Table (11) – stakeholder assessment matrix

28.Styles of leadership

Bureaucratic leadership is leadership based upon fixed official duties under a hierarchy of authority, applying a system of rules for management and decision-making. This style of leadership can be advantageous in highly regulated lines of business, and it can be an efficient management style in companies that don't require much creativity or innovation from employees.

❖reasons why such model is preferred:

1. Have a clear job description for all team members. You may require them to be flexible enough to take on additional roles. However, there should be a clear indication of each team member's core responsibilities.
2. Conduct performance appraisals objectively using clearly outlined job descriptions as a guide.
3. Encourage merit-based promotions based on performance and job requirements so that nepotism and favoritism are non-existent in your organization.
4. Document procedures and processes that need to be repeated so that everyone in the organization is clear about what should be done. This also helps with continuity when someone new enters the organization.

5. Be very clear on authorization and approval rules so that people know which decisions are within their power and which ones need escalation. Define the escalation levels as well as the authorized approval roles within the organization.
6. Use it in areas where it is needed from a governance standpoint, such as the finance department, contracts, etc. but don't use it in the areas where creativity is a must.

29.Motivation Methods

For the organization to be successful with quality in its output and to achieve its vision of satisfying its customers, all the work teams within it must have a comfortable work environment that motivates and makes them happy in performing their work to the fullest. Therefore, motivation must be used for each employee according to his needs. All members of the organization, from the largest member to the smallest, work and love to work in a comfortable environment. They follow the following approach:

1. The construction team was the way to motivate them when working hours were increased by giving them overtime to encourage them to work more hours to prepare the new hatcheries on time.
2. The organization's leadership has given all employees high- quality health insurance in either the A or B class.
3. The organization's leadership has established a complaints and suggestions committee to hear the employees well.
4. The organization's leadership provided the organization with a gym and internet packages for the entertainment of employees.
5. Assigning rewards to exemplary employees and honoring them periodically.

30. RACI Model

Sr. #	PM Stages	Deliverable/ Task	PMO	PED	User Dept.	Other Depts.
1	Initiation	Conversion of Business Plan into Projects	A & R			
		Development of 5 Year Projects Plan	A & R	Consultation	Consultation	
		Project Feasibility Plan	A & R			
		Project Budgeting	A & R	Consultation		
		Project Charter	A & R	Consultation	Consultation	
2	Planning	Development of Detailed Budget	A & R	Consultation	Consultation	
		Site approvals / Legal Documentation	Consultation	Information		A&R Support Svc.
		Selection of Contractors/Suppliers	Consultation	A & R	Information	Proc. Dept
		Selection of Equipment & Machinery	Consultation	A & R	Consultation	Proc. Dept
		Preparation of Contracts /Agreements	A & R	Consultation		A&R Legal Dept.
		Procurement Planning	Consultation	A & R		Proc. Dept
		Project Scheduling	Consultation	A & R	Information	
3	Execution	Creation of PRs			A & R	
		Creation of POs, Procurement of Equip. & Mach.	Information	Information		A&R Proc. Dept.
		PM of Civil, Mechanical & Electrical Work	Information	A & R		
4	Monitoring & Control	Project Monitoring wrt Cost & Schedule	Responsible	Accountable		
5	Closure	Handing over of completed Project to Operations	Information	Accountable	Responsible	
Legends Accountable & Responsible (A & R) Accountable (A) Consultation (C) Responsible (R) Information (I)						

Table (12) – RACI Model

31. Conflict and Crisis

- Definition of conflict:**
 Conflict is when two perspectives, personalities, values, or opinions contradict each other. In some cases, it is a natural contradiction. Conflicts are natural to human nature, and they can be constructive and promote better performance among individuals.
- Definition of conflict management:**
 Conflict management is the process of limiting the negative aspects of conflict while increasing the positive aspects of conflict. The aim of conflict management is to enhance learning and group outcomes, including effectiveness or performance in an organizational setting. Properly managed conflict can improve group outcomes.
- Definition of crisis:**
 While conflict describes an interaction of friction and discord resulting from diverging, insurmountable interests, crisis describes the apex of a conflict. Very often, a crisis is thought of as a sudden and unexpected event leading to a dangerous escalation.
- Definition of crisis management:**
 Crisis management is the process by which an organization deals with a major event that threatens to harm the organization, its stakeholders, or the public.

32. Scenarios of the conflict's

Expected scenarios of the conflict's events in the project with the optimal strategies to deal with it:

- **Scenario 1: You get off on the wrong foot with a new team member.**

In a previous project, they asked you for help. You refuse to lend a hand because you were working on a tight deadline and didn't want to waste time. There has been tension between you two ever since, and now you need their help on the project, but they're not being very responsive.

The Proposed Solution

- The best strategy in this scenario is to Collaborate.
- Find an appropriate time to walk up to them and say, "I understand that we got off on the wrong foot. My apologies for that. What I'm trying to resolve is X. Can we have a conversation about that?"
- Regardless of who the conflict is with - an employee, your boss, etc-. they'll think more highly of you if you demonstrate self-awareness.
- The conversation may be awkward, but that's better than a tense relationship that could last years all because you got off on the wrong foot.
- Key Focus: It's all about how you approach the situation.
- Try to maintain respect in the conversation and understand that it does not mean that you're going to love each other at the end of it. At the end of the day, you are trying to resolve something so that you can move forward and execute on whatever project or plan you need to deliver.

- **Scenario 2: You got a promotion that your friend at work was also gunning for.**

Now things are awkward between you two. You definitely want to keep the friendship going, but they aren't even speaking to you outside of team meetings.

The Proposed Solution

- The best strategy in this scenario is Confrontation.
- We suggest going up to the person and owning it. Tell them that you know it's an uncomfortable situation and that you'd like to continue the relationship. These situations are tough, but radical candor is important.
- Key Point: Be proactive. Break the ice. Figure out how to work together.
- Never apologize for your promotion/moving your career forward. Prepare to be content with the other person's decision if they are no longer interested in continuing the friendship.

- **Senario3 : differing preferences on how to get things done**

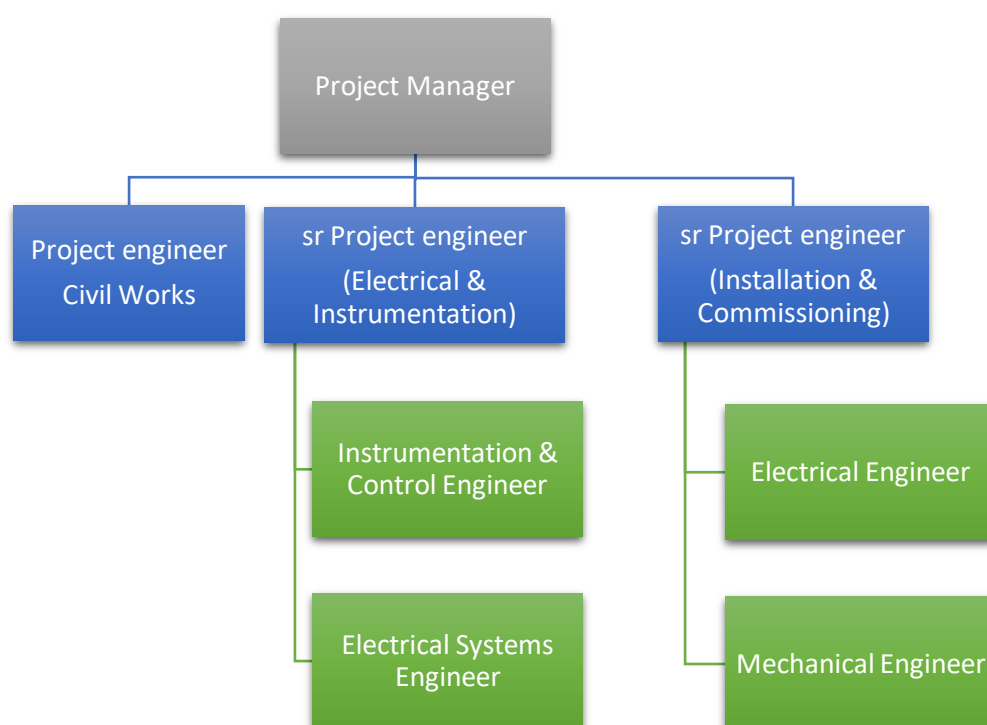
One particular meeting’s agenda items were crucial to the success of the current project. Several key decisions must be made and implemented quickly. True to form, one team member is laughing and telling stories with little regard for the time crunch. Another team member’s irritation is growing, and he can’t understand why no one, especially you as the team leader, is taking control of the situation.

The Proposed Solution

- The best strategy in this scenario is smoothing.
- They deal with stress in their own way.
- When you realize he is telling another animated story, you can say, “that sounds great, and we’d love to hear about it! We need to keep this meeting running on time ... how about if you tell us about it later?” Saying this with a smile and in a light tone of voice will keep his defenses down yet give her the recognition that she needs.

Important Note: This conflict resolution strategy does not require much effort. You can focus on essential issues by ignoring unimportant arguments. Situations can be potentially handled simply while bringing harmony, creating goodwill, and providing enough time to find a permanent solution.

33. Human resources on the Functions



shape (13) – Human resources structure

34. Fast tracking vs crashing

- **Fast Tracking:**

Fast tracking a project means working on it simultaneously instead of waiting for each piece to be completed separately.

- **Crashing:**

Crashing is the technique to use when fast tracking has not saved enough time on the project schedule. With this technique, resources are added to the project for the least cost possible. Cost and schedule tradeoffs are analyzed to determine how to obtain the greatest amount of compression for the least incremental cost. And crashing is expensive because more resources are added to the project.

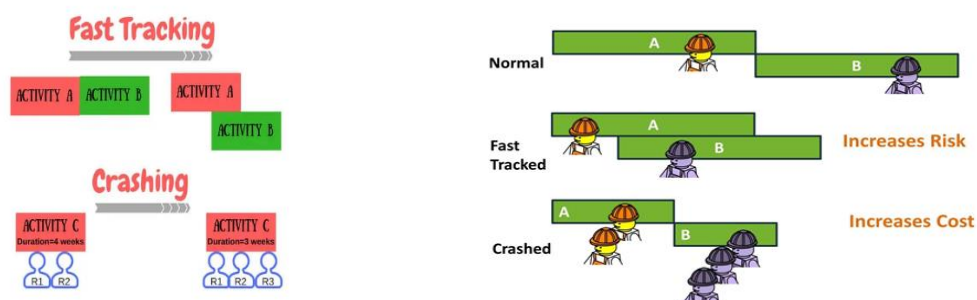
- **Fast Tracking vs Crashing**

There is no reason to fast track or crash any activities that are not on the critical path—you won't gain any time on your overall schedule if you cannot shorten your critical path.

In summary, the differences between fast tracking vs crashing are:

fast tracking	crashing
involves the performance of activities in parallel	involves the addition of resources to a project
increased risk	increased cost

Table (13) – fast tracking vs crashing



shape (14) – fast tracking vs crashing

35. Negotiation

The following *Negotiation Plan* will assist SOROH CO. Procurement staff when preparing for negotiations. It has been designed as a simple tool to help staff analyze issues and prepare successful negotiation strategies.

The guide will prompt staff to think through the requirements and objectives prior to undertaking important negotiations as well as consideration of both sides' needs, strengths, and weaknesses in order to understand the overall context of the negotiation, leading towards an improved position.

Good preparation and planning are crucial to the achievement of successful negotiation outcomes.

Note that this document is intended to be used as a guide to the creation of a negotiation plan and that, as such, some of the requirements listed may not be applicable for every scenario.

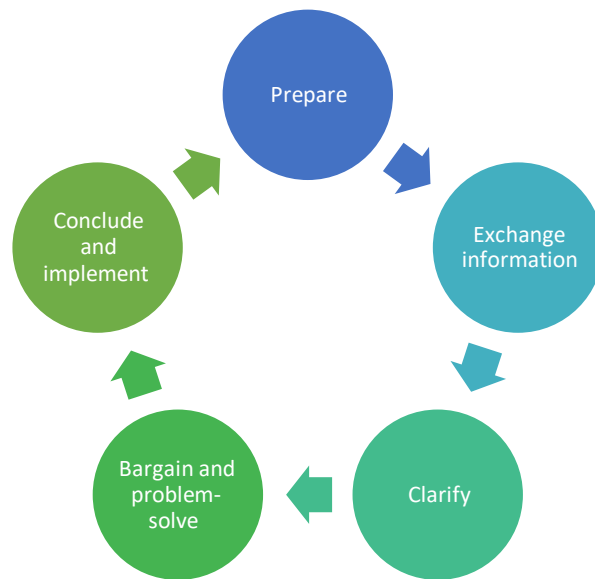
Possible scenarios where this *Negotiation Plan* may be useful include but are not restricted to:

- RF finalisation negotiations
- Contract renewal negotiations
- Contract variation negotiations
- Contract management negotiations
- Sole supplier situations (where appropriate).

○ **Negotiation Plan:**

❖ The 5 Stages of the Negotiation Process:

1. Prepare.
2. Exchange information.
3. Clarify.
4. Bargain and problem-solve.
5. Conclude and implement.



shape (15) – 5 Stages of negotiation process



shape (16) – Negotiation concept

❖ **There are two possible types of negotiation.**

1. Distributive negotiation.
2. Integrative negotiation.



NEGOTIATION PLAN

RO SYSTEM

TEAM CODE: 0

NEED:

- To FIX new Reverse Osmosis plant in Hatchery expansion Project
-

INTERESTS:

- To install system of RO can deliver enough treated water to the project
- To receive a good deal for needed RO system
- To ensure time limit compliances in the conduct of various phases of the deal.

STRATEGIC STRONG POINTS:

- The system we have now , in operation and we need to deal with same company or similar .
- The price and the service are very important in selection the company provided the system
- Quality is important and the durability of the system.

STRATEGIC WEAK POINTS:

- Need for consideration value to be paid in 3 batches .payment terms
- Time limitation for completion of system need to be considered less than

GOALS AND OBJECTIVES:

- To be able having treated water for operation side
- Fix the system before end of project to use it in right manner
- Select the system with less than 170000 SR
- The new system should be aligned with old one

VIABLE/CONCILIATORY OPTIONS:

- To accommodate the interests of both the companies by compromising on the estimated value for the purchase of UPS
- To plan a discounted consideration provided that 20000 SR to use it in civil work

BATNA:

- To approach with UPS which will be much better than others company because the old system is from UPS
- If we will get good price and also 20000 SR discount we will sign and make deal with UPS
- To give free training for our operators and maintenance staff
- To ask them also providing 2 months chemical free , only mentioned 1 month

WATNA:

We will sign with other company can provide same solution as the risk is very minimal



Negotiation Plan 2

Contract: Hatchery Equipment's	
Document number: [01]	Date: Friday, October 29, 2021

Contact details

Name: Ahmed Alasmari	Position: sr Technical Project Manager
Business Unit: PED	Division:
Phone:00966594444739	Email:

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1. Introduction

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- contract management negotiations
- sole supplier situations (where appropriate).

2. Negotiation plan

2.1 Contract information and parties

Contract Number	01
Contract Name	Hatchery equipmentS
Organisations planned to take part in the negotiations	

2.2 Participants and authority

2.2.1 SOROH Procurement

Name	Title	Role
Name	Job Title, Organisation	Chief Negotiator
Name	Job Title, Organisation	Secretariat
Name	Job Title, Organisation	Observer

Note: A minimum of two SOROH Procurement participants are required in all negotiations

2.2.2 Supplier

Name	Title	Role (if known)
Name	Job Title, Organisation	Chief Negotiator
Name	Job Title, Organisation	Secretariat

Name	Job Title, Organisation	Observer
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Are you satisfied that the negotiators from the other side have sufficient authority to bring negotiations to a successful conclusion?

☐ Yes

☐ No

2.3 Location and expected duration

Ensure the location is suitable and conducive to a positive outcome. Locations should be convenient, comfortable, allow for uninterrupted negotiations and have the capacity for teams to break out to confer and strategise.

Location of negotiations	SOROH HEAD QUARTER
Planned negotiation start date	10July 2021
Planned negotiation end date	10Aug 2021
Expected number of meetings	4

2.4 Reason for negotiations

Why are negotiations required? (provide supporting information)	To select the best offer for Hatchery equipment
Who has approved the decision to negotiate? (provide details of briefing note if appropriate)	Final Approval will be by CEO after getting all needed information and technical review from Technical and operation team

Was the need for negotiations anticipated in the procurement strategy and were respondents advised of this in the RFX documentation? If not, seek legal advice before proceeding.

We will talk to procurement Department but the final decision will be by technical and operation team

3. Probity information

3.1 Probity

Are there any probity concerns with the proposed negotiation?

☒ Yes

☐ No

If so please outline the issues and comment on how they are being addressed.

Concerns	Mitigations
Any one from selection panel will be bias to any equipment supplier	Legal Department representative will be attending

Have probity requirements been discussed with the negotiation team?

☒ Yes

☐ No

3.2 Procurement conduct plan

The *Procurement Conduct Plan* must be provided to all SOROH participants involved in negotiations and a signed *Code of Conduct, Probity and Confidentiality Agreement* included on the file.

Has each member of the negotiation team signed the *Code of Conduct, Probity and Confidentiality Agreement*?

☒ Yes

☐ No

TRIM Document Number/s	01
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Are there any unresolved **Conflicts of Interests** for participants involved in the negotiation?

☐ Yes

☒ No

3.3 Probity advisor

Is a probity advisor required?

☐ Yes

☒ No

If yes, please outline why a probity advisor is required.

3.4 Negotiation protocol

The use of a negotiation protocol should be considered where there is:

- significant contract value or amounts
- a considerable SOROH commitment
- sizeable liability or risk
- concern over the previous conduct of the other party.

Will a negotiation protocol be created and signed by both parties before the beginning of negotiations?

☒ Yes

☐ No

What are the areas of particular concern that warrant a negotiation protocol?

3.5 Government Information (Public Access) Act

Have the other parties been advised that files and papers pertaining to the negotiation may be subject to the *Government Information (Public Access) Act 2009* and could potentially have to be disclosed?

☐ Yes

☐ No

3.6 Reporting

Describe to whom as well as how and when the progress and results of negotiations will be reported.

The final report will be sent confidential to COO.CFO AND CEO

4. Preparation

4.1 Research

Is the subject matter which will form part of the negotiations fully understood by all members of the negotiation team?

☒ Yes

☐ No

List key areas that will need to be addressed

- Types of equipment
- Needed of equipment
- Area of negotiation
- Cost

Do you thoroughly understand the products/services and the supply market?

☒ Yes

☐ No

Have you completed the Supply Positioning tool?

☒ Yes (include as an attachment to this plan)

☐ No

List market issues that need to be taken into consideration.

- Limited equipment resources
- Obstacles during integration between old and new areas
- Operation after completion of project

Have you conducted research on the company that you are negotiating with?

☒ Yes

☐ No

What have you discovered?

We have to talk to only 2 companies for the main equipment and put in mind we need Petersime equipment as first choice but we will talk in serious ways

Have you completed the *Supplier Preferencing* tool to better understand how they view us?

☒ Yes (include as an attachment to this plan)

☐ No

Have you read their financial reports?

☒ Yes

☐ No

What have you discovered?

The prices will not much different but the concern in linking of old and new and we will face definitely software issues once we will change main equipment

Are you aware of precedents that could assist your cause?

☒ Yes

☐ No

If yes what are they?

Normally we will have software issues and the system will be not opened if you will change main equipment and you want to do integration later on

Is an expert category and/or legal expertise required assist with the negotiations?

- ☐ Category – Insert name if known
- ☐ Legal – Insert name if known
- ☒ No experts required

4.2 Interests

Our interests	Their interests
To link with Petresime equipments for hatchers and sitter	To sell their equipments with good price

4.3 Our strengths and weaknesses

Strengths	Weaknesses
Have enough financial resources	Limited choices
Have experiences	Operation after completion in case we have selected different equipment
Have ability of negotiation	

--	--

4.4 Their anticipated strengths and weaknesses

Strengths	Weaknesses
Quality	Company situation and limited of projects during covid 19

4.5 Risks

Our risks	Their risks
Operation	Selection another supplier

4.6 Competitive pressure

What competitive pressures does the other party face?	Others suppliers
--	------------------

Can what is being offered be sourced elsewhere? If so, how difficult would the sourcing be?	Yes but with risk
How important is this deal to them?	Very important

4.7 Alternatives to a negotiated agreement

What alternatives do we have if the negotiation is lengthy and unsatisfactory or ends without agreement?	We have
What is our best alternative to a Negotiated Agreement (BATNA)? (Note: a strong BATNA position means a strong negotiation position)	Going to another supplier have same ability of equipment
What could improve our BATNA? Can we remove constraints and improve our BATNA position?	Our relationship with them , very long and successful

4.8 Their alternatives to a negotiated agreement

What alternatives do we think they have if the negotiation ends without agreement?	Lose deal
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What is their best alternative to a Negotiated Agreement (BATNA)? (Note: a strong BATNA position means a strong negotiation position)	Reduce in prices and get service contract
What could improve their BATNA? Can we remove constraints and improve our BATNA position?	Adding spare parts values and service contract

5. Objectives and negotiation points

5.1 Our objectives

List and describe our objectives in order of priority and preference. Consider if each objective is a **must have** or a **nice to have**.

Objective	Must	Nice
Use only Peter Sime equipment	X	
Cost reduction		X
Service contract with them and warranty	X	

5.2 Their objectives

List and describe what you think their objectives may be, in order of priority and preference. Consider if each objective is a **must have** or a **nice to have** for them.

Objective	Must	Nice
Sell the equipment		X
Get service contract	X	

5.3 Negotiation points

Negotiation Point	Current Position	Revised Position	Must	Nice
cost	Partial agreed			X
Value			X	
Performance				X
Quality				X

5.4 Concessions

Concession	List the concessions that we will be prepared to consider
Link between old and new equipment	

6. Positions

6.1 Our position

Clearly and systematically outline our starting position.

[Guide Note: Consider the credibility of your targets. Are they too ambitious? Not ambitious enough? Are they realistic?]

- We are in good position and we will finish the deal successfully

6.2 Their anticipated position

Clearly and systematically outline what we think their starting position will be.

- They are taking win-win principle during contact

6.3 Best case scenario

Describe what you think our best case result would be.

- Make contract with them fully Peter Sime equipment providers

6.4 Bottom line

What is our worst case acceptable negotiated position?

- Nothing we are in good position

7. Approvals

This *Negotiation Plan* must be reviewed and approved by your director prior to proceeding with negotiations.

Name	Name	Signature	Date
Prepared by	Ahmed Alasmari		
Reviewed by			
Approved by			

Appendix A - Qualities of an effective negotiator

An effective negotiator:

- prepares carefully, analyses and thinks the issues through
- uses every negotiation meeting to learn more and prepare further
- is confident, listens, questions and contests without aggression
- is adaptive to the prevailing atmosphere of the negotiation and can be resolved and firm when needed
- thinks before speaking, communicates clearly and creates an atmosphere of trust
- recognises position shifts and takes advantage of opportunities
- will look to pick up a benefit in return before conceding a point (i.e. If we agree to this, will you agree to that)
- considers strengths and weaknesses from both sides as well as time constraints influencing the negotiation and uses this knowledge to tactical advantage when appropriate
- understands where the obstacles are and can suggest imaginative and practical ways forward. Can produce reasoned options that can be beneficial to both sides
- works with the other side to generate a sense of ownership for solutions put forward
- focuses on interests, not on people and positions and never loses sight of objectives throughout the negotiation process

- compares the proposed solution(s) to his party's BATNA before finalising any agreement
- consider role-plays or conducting a mock negotiation prior to the formal negotiation meeting.

Appendix B – Negotiation roles and responsibilities

In considering the make-up of the negotiation team, take into account the relevant and complementary skills and knowledge of participants by:

- involving the manager who will be responsible for ongoing management of the contract, e.g. the category manager or client representative (if a client-specific contract)
- understanding whether the team has the required communication, problem-solving, technical and financial skills, along with an understanding of the relevant industry. The SWOT analysis tool may assist in considering the team's strengths and weaknesses. If negotiations will include changes to the standard terms and conditions of government agreements, ensure you have sought legal advice prior to the negotiations and consider including a legal representative on the negotiation team
- using professional advisors if the negotiations are likely to be complex, where there may be difficulties reaching agreement, or if there is a need for specific expert advice
- understanding the extent and limits of your authority to negotiate terms. Clarify your delegation to act on behalf of NSW Procurement prior to the negotiation meeting
- not overloading the team! A cast of thousands may slow down negotiations and overwhelm the other party. Note that a minimum of two SOROH CO Procurement representatives must participate in the negotiations.

Role	Responsibilities
Chief or lead negotiator	• Final preparation of negotiation strategy • Set agenda, introduce team members • Keep “eye on the prize” – maintain overarching view of negotiation process and progress; keep discussions on track
Negotiation specialist/ advisor	• May be chief negotiator • Specialist advice on negotiation strategy and tactics
Negotiator	• Member of procurement team • Contribute to preparation of strategy • Participate in negotiations on the day
Technical expert	• Provide specialist technical knowledge to negotiation team • Determine if proposals during negotiation meet technical requirements
Legal advisor	• Provide legal advice on proposed terms and conditions • Determine if amended clauses are acceptable (subject to final sign-off by General Counsel)
Probity advisor	• Independent observer of negotiation process • Oversee preparations, negotiations and post-negotiation processes to ensure probity provisions are maintained

Observer	Member of procurement or management team observing negotiations to ensure compliance with SOROH Procurement process and procedures
Note / minute taker	Administration or procurement support staff, responsible for documenting key discussions, drafting and finalising minutes, seeking concurrence from negotiation participants

Appendix C – Additional resources

The following resources are available to assist planning your negotiations

- Negotiation Protocol
- Negotiation Points Planning template
- Post Negotiation Review
- Supply Positioning tool
- Supplier Preferencing tool
- SWOT Analysis
- Balance of Power Too

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