

2019

# SAVE International VM Practitioner Survey Results

## OVERVIEW

The Director of Education for SAVE International, in cooperation with the Value Methodology Body of Knowledge (VMBoK) Committee, performed a survey of Value Methodology (VM) practitioners. The survey was distributed by the SAVE International Business Office to current members via email on Thursday, February 28th, 2019. The survey was closed on March 8th, 2019.

The purpose of the survey was to elicit feedback from VM practitioners to:

- Support the development of the VMBoK Guide content.
- Understand what areas of application practitioners are focused on.
- Understand practitioner interest in expanding their VM knowledge.
- Elicit feedback on the importance of specific techniques commonly applied during the Information, Creative and Evaluation Phases of the VM Job Plan.
- Develop an understanding of interest in practitioner participation in reviewing and editing the Draft VMBoK Guide.

This report documents the results of the survey and offers an interpretation of this information.

## EMAIL COMMUNICATION

The following email was sent to members inviting them to participate in the survey. This email was sent at 2:00 PM Pacific Time on Thursday, February 28th, 2019.

*Dear Member,*

*The Value Methodology Body of Knowledge (VMBoK) Committee has prepared a brief survey to elicit your feedback regarding specific areas of the VM Job Plan.*

*Please take a few minutes to click on the link below and complete the survey – the information will be used to make decisions about what essential techniques to include in the draft version of the VMBoK Guide:*

<https://www.surveymonkey.com/r/63PVS8H>

*The survey period will end on Friday, March 8th at 5:00 PM PST.*

*Sincerely,*

*Robert B. Stewart, CVS-Life, FSAVE, PMP, PMI-RMP*

*Director of Education, SAVE International*

## VALUE WORLD COMMUNICATION

An article in the March 2019 edition of Value World written by the Director of Education related to the VM Practitioner Survey. The article is included here for context:

### **VMBoK Guide Update**

*By Robert Stewart, CVS-LIFE, FSAVE, PMP, PMI-RMP – Director of Education, SAVE International*

*The Value Methodology Body of Knowledge (VMBoK) Guide Committee has been working diligently and has produced over 125 pages of content in addition to the content in the Function Analysis Guide. The current plan is to have a draft document ready for review by the SAVE International membership by the time of the upcoming Value Summit in June.*

*The member review of the content will be organized using smaller, facilitated groups so that there can be ample time for meaningful dialog rather than just one-way feedback. The challenge facing the VMBoK Guide Committee is to focus on that information necessary for a CVS to know and to perform his or her functions as a value study facilitator effectively. The other challenge is to present the material in a way that makes it relevant to different types of VM applications, including projects, products, processes, services and organizations.*

*What we learned in the previous round of member comments related to the VMBoK Glossary was that most members are experienced in only one of these application areas. This is understandable as most practitioners tend to focus on a specific technical area with which they are most familiar (e.g., construction, manufacturing, etc.). The problem is that this creates significant blind spots for much of the membership with respect to relevant techniques and nuances of application. If anything, it has further underscored the need to develop this resource to broaden the understanding of the broad range of VM applications amongst its members in order to proliferate its use and raise general awareness of the power of this approach to value improvement.*

*In June, the VMBoK Guide Committee will be organizing sub-committees comprising SAVE members to review each section of the VMBoK. We will likely leverage a web-based platform such as GoToMeeting or WebEx to facilitate these sessions so that the sub-committees can discuss the content and offer input on how to improve it. It is extremely important that we engage the membership – we want the VMBoK to reflect the wisdom of our colleagues and your participation is critical. We will provide additional details on the structure and timelines of the VMBoK Guide draft review process at the Value Summit.*

*In the meantime, the VMBoK Committee has prepared a brief online survey to elicit member feedback with respect to content, specifically on the basic/essential techniques that a CVS should know. Please keep in mind that we are trying to keep this to what is “essential” recognizing that there are countless techniques, and related derivatives, applied by VM practitioners. An email containing a link to this survey was sent to all current SAVE members on February 28. Please look for this in your inbox – the survey will only be open for one week.*

*Everyone on the VMBoK Committee welcomes your input into this important resource. I hope to see you all at the 2019 Value Summit June 8-11 in Portland, OR!*

## SURVEY PARTICIPATION

Approximately 122 people participated in the survey. The survey included the following introduction at the beginning of the survey to provide additional context:

### **Survey Overview**

*The Value Methodology Body of Knowledge (VMBoK) Committee is working on developing the draft document that will be available for review by the SAVE International membership around the time of the Value Summit scheduled this June.*

*As part of this effort, we would like to invite the VM practitioners in our community to provide their input on a number of questions that will help guide the committee in its work.*

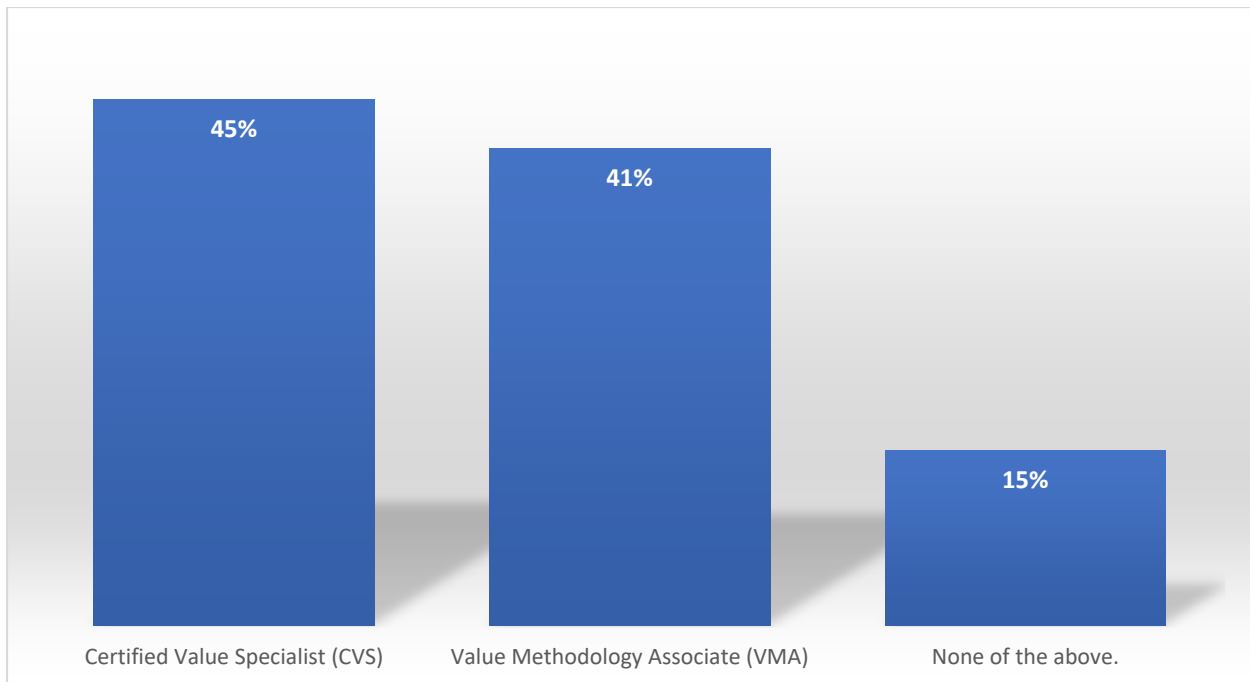
*This survey is designed to elicit feedback concerning VM techniques that practitioners feel are most important for their fellow facilitators. Of special interest to the Committee is feedback on what techniques a new Certified Value Specialist (CVS) should know and be able to apply to guide value teams. The survey questions are directed toward the Information, Creative and Evaluation Phases of the VM Job Plan.*

*This survey is brief and should not take more than 10 minutes. Thank you for your time!*

## SURVEY RESULTS

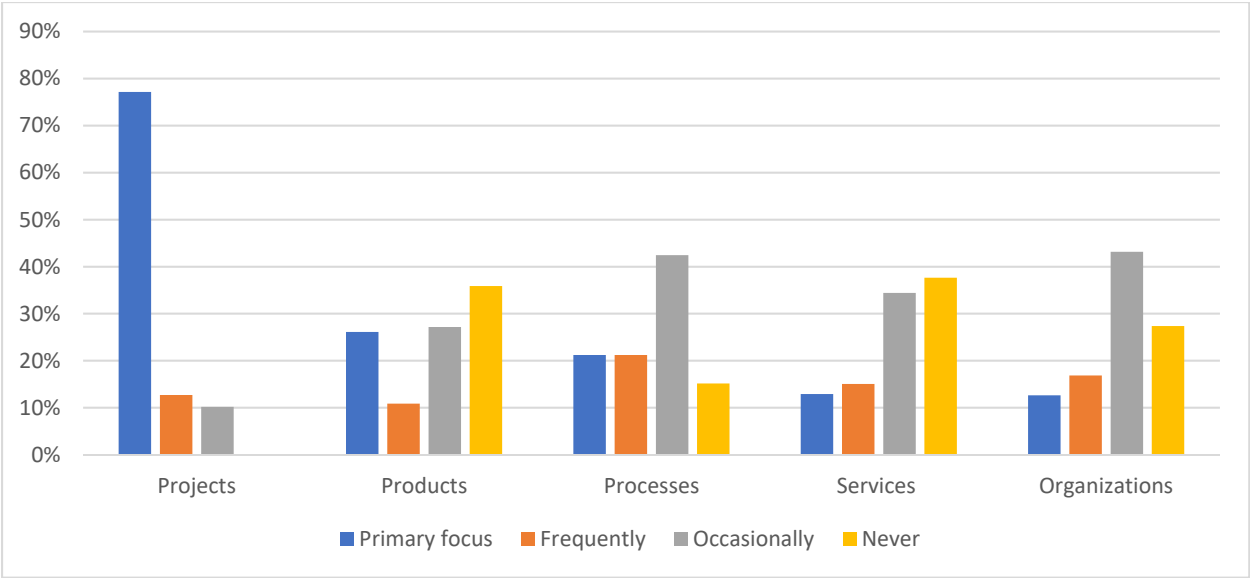
The survey consisted of ten questions. These are listed in order of their original appearance in the survey.

**Question 1.** Please indicate your SAVE International credential.



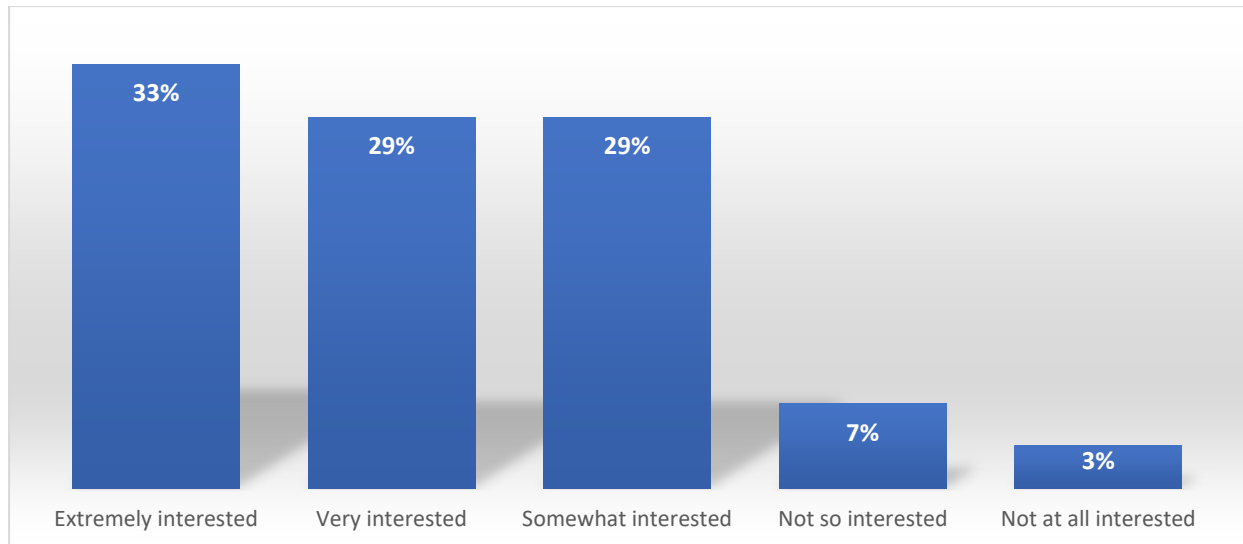
85% of all respondents indicated that they had at least completed a VMF-1 (or Module 1) VM training courses. Nearly half identified themselves as Certified Value Specialists.

**Question 2.** What are your primary focus area(s) in applying the Value Methodology? Mark only those areas that you are actually involved with.



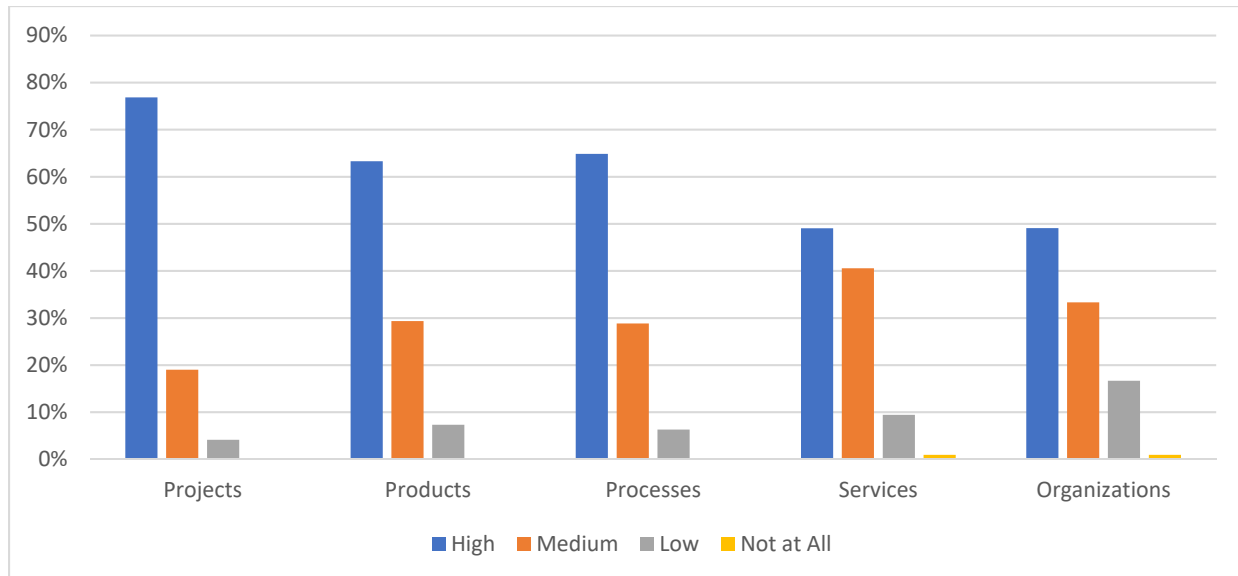
Most respondents (77%) indicated that a primary focus area was “projects.” The next highest was “products” at 26%.

**Question 3.** What is your level of interest in improving your understanding of VM practices and techniques outside your primary focus area as indicated in the previous question?



A clear majority (62%) indicated that they were either extremely or very interested in learning VM applications, and related techniques, outside of the primary focus area identified above.

**Question 4.** In your opinion, how important is it that a Certified Value Specialist (CVS) know how to apply VM to different focus areas?



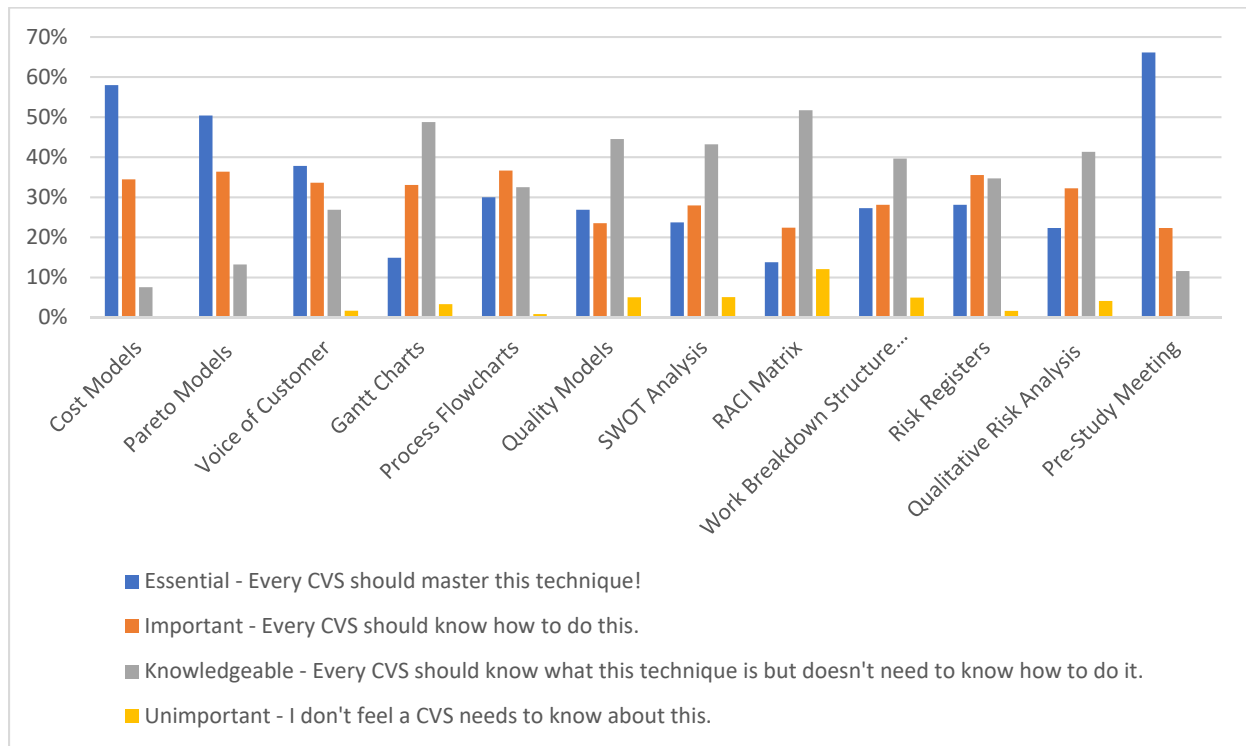
Most respondents indicated that it was “highly” important that a CVS should know how to apply VM to projects, products, and processes. Interestingly, about half of all respondents indicated that it was also “highly” important to know how to apply VM to services and organizations.

Additional comments provided by participants included:

- VM can be used to enhance effectiveness in any area or industry including team collaboration and personal relationships.
- 'Themes' like sustainability of safety.
- Planning (strategic, etc.)
- Standards and Procedures
- No
- Risk
- It is important to differentiate application of a methodology and the decision to apply a methodology within a 'project context' AND within a 'business as usual' context
- Systems of Information Technology
- Programs and Portfolio
- Research, e.g. defining new technical terms
- Developing a highly functioning VE team.



**Question 5.** There are many techniques that may be employed during the Information Phase of the VM Job Plan to transform information to a state that is more useful to the value team. Indicate how important each of the following techniques are for a new CVS to know and be able to apply correctly.



Several techniques included additional clarification as follows:

- Pareto Models (for cost, time, or any other quantitative measure)
- Voice of Customer (e.g., surveys, interviews, focus panels, etc.)
- Quality Models (e.g., Quality Function Deployment, Balanced Scorecard, etc.)
- Work Breakdown Structure (WBS)
- Qualitative Risk Analysis (Risk Scoring, HEAT Maps, etc.)

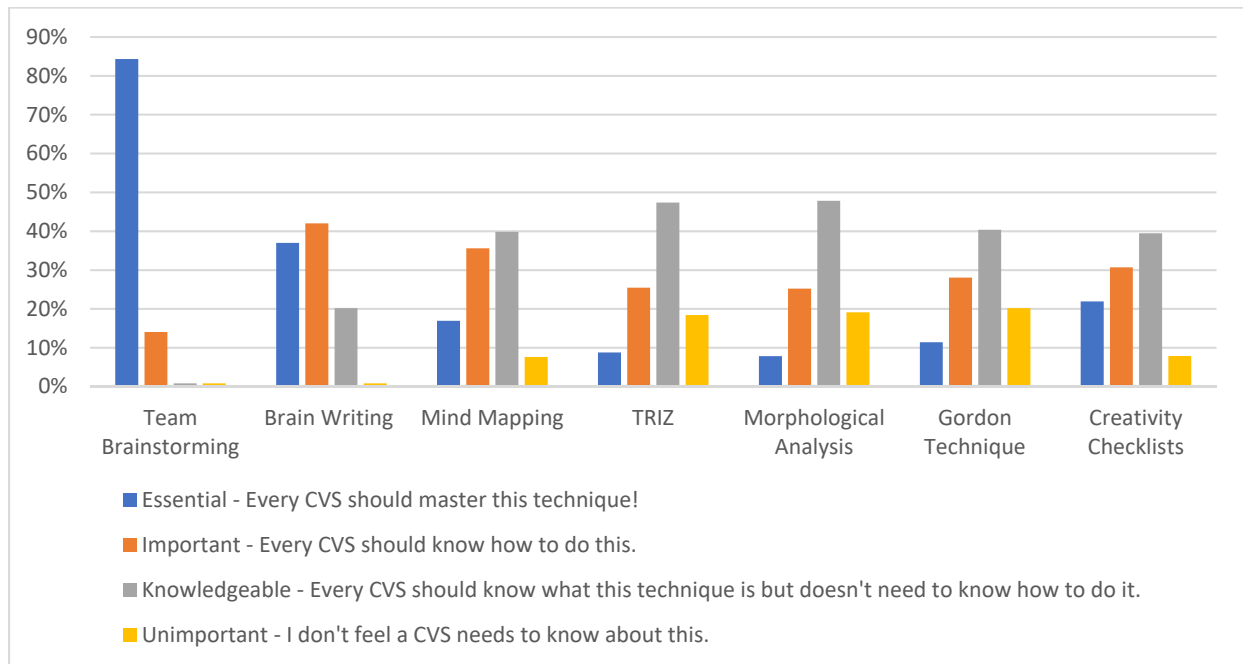
Additional comments provided by participants included:

- Value Network Analysis
- Voice of user, voice of financier. I'm using more and more techniques from Human Centered Design for this.
- Absolute top priority is to understand the concept of function and functional thinking to be able to uncover the effects which the customer is looking for and the root causes of problems and the fundamental characteristics of value for an organization. It is essential that both an AVS and a CVS can differentiate between attribute and function and can differentiate between cash, resource, liability and asset. Anyone can go to the bank and borrow money: 'cost' takes all sorts of forms. Often whatever money might be required to generate revenue or create public benefit

is actually freely available if only the case can be made that your value improvement proposal is better than another value improvement proposal. (Maybe that makes a case for value methodology - its about stimulating, designing and implementing value improvement proposals and doing this in a way which makes best use of existing resources.) The crucial points for the CVS are to understand 'function' and 'value' and to be able to facilitate productive group discussions and investigations / studies of these topics

- Implementation supporting knowledge
- Design for Assembly, Design for Manufacturing
- Failure Mode Effect Analysis, Tear Down Reports (for Manufacturing), Reading Blueprints and Drawings, Affinity Diagramming (KJ Method), Weighted Averages
- If a CVS is specialized then certified for that specialty, if they are a generalist, then a different cert indicating robust certification.
- Review of available documents.
- Function Analysis- Essential

**Question 6.** There are many creativity techniques that can be used during the Creative Phase of the VM Job Plan to generate ideas. Indicate how important each of the following techniques are for a new CVS to know and be able to apply correctly.

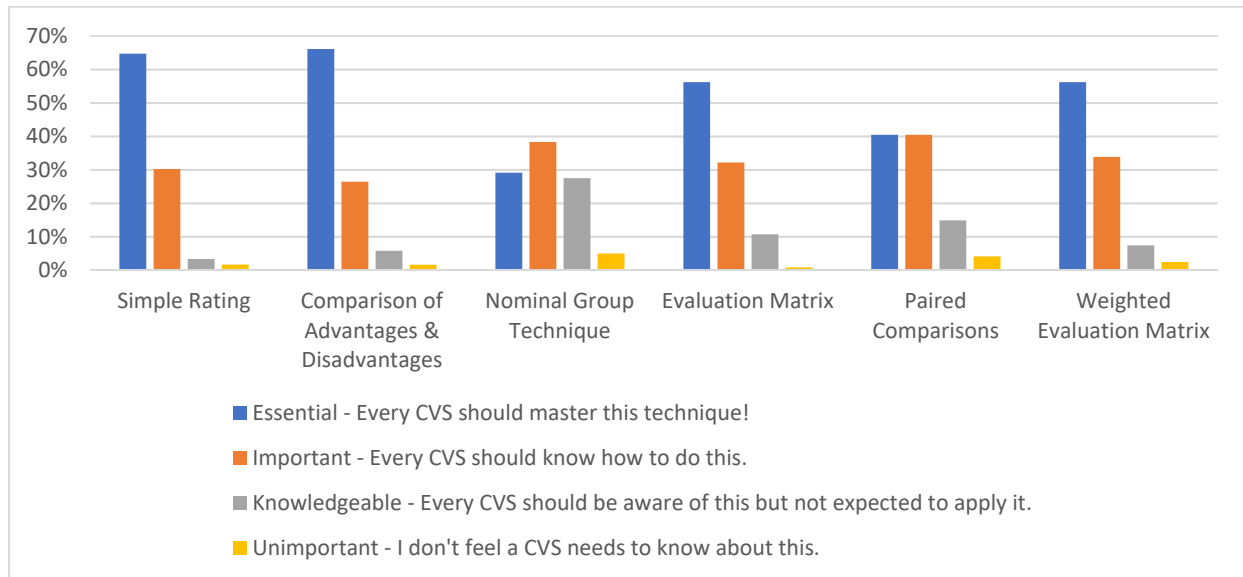


Some additional context was provided for “Brain Writing” (e.g., having team members write down ideas individually and then sharing and combining them with the group).

Additional comments provided by participants included:

- Lotus Blossom Technique
- Again, have a look on the creativity techniques of Human Centered Design. The use of a mixer of writing words, drawing and writing full sentences.
- Delphi Method
- Delphi method
- Discuss methods in context of use. Refer to techniques in 'functional language' not 'ideological language' (e.g. mention metaphor / synectics not Gordon) Also mention perceptions and mind sets and focus on function for creativity. DeBono lateral thinking etc. - Give credit to DeBono too as contemporary of Miles, Bytheway etc during 1960's when value methodology became more widely known about.
- Knowledgeable - Delphi Method, Gordon Technique, Empathic Design, Gallery Method

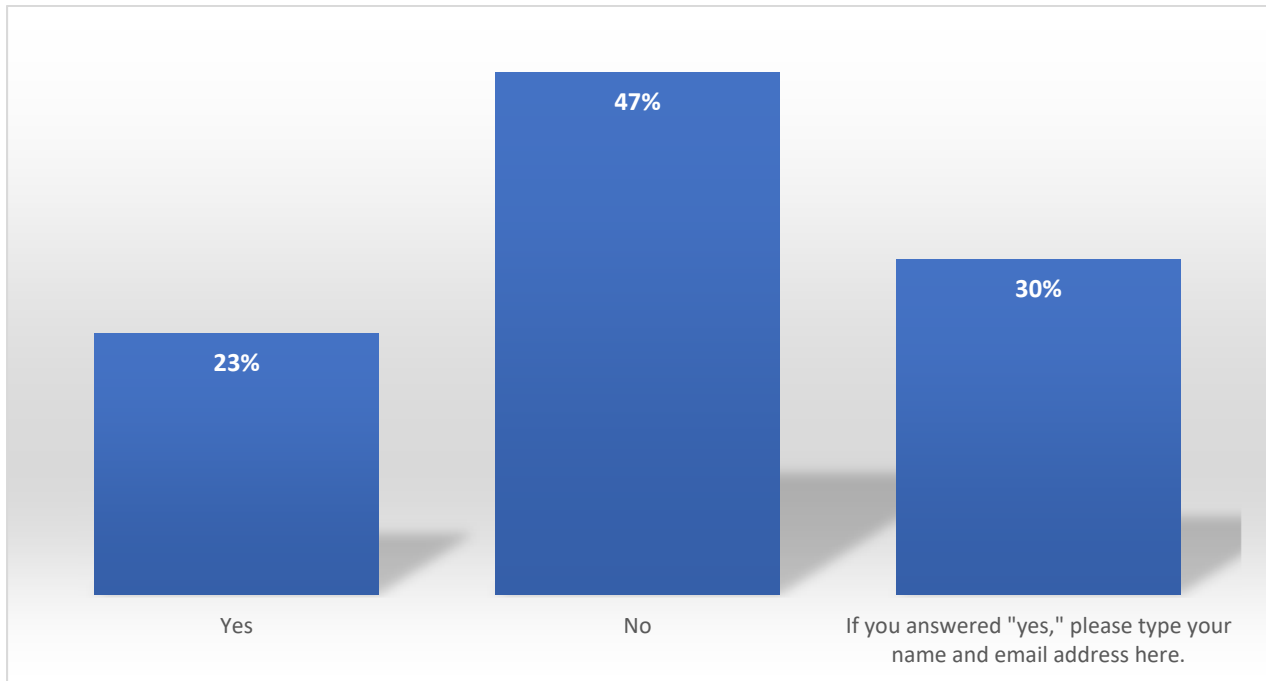
**Question 7.** There are many methods that can be used during the Evaluation Phase of the VM Job Plan to evaluate ideas. Indicate how important each of the following techniques are for a new CVS to know and be able to apply correctly.



Additional comments responses provided by participants included:

- Choosing by Advantages (CBA) - Knowledgeable
- Pugh method
- Scoring Method
- Introduce these rating techniques during information stage - It is vital to understand priorities when setting the question. It is useful to sense check priorities when evaluating the solution against the set of agreed functional requirements. 'comparison of advantages' as a method should be distinguished from 'comparison of advantages and disadvantages'. All the business case speak should be mentioned here too - how to make the case for a proposed solution - eg discounted cashflow revenue differentiate cost, liability and asset on a balance sheet. Focus on cost reduction is just part of the work. Again focus on function of method - e.g. strategies for building consensus by focusing on majority decision to choose the best option or unanimous decision to choose a satisfactory option
- Feasibility Ranking matrix: Essential
- DARE Method (Japanese Method), Forced Decision FD Method (Japanese Method)
- Choosing By Advantages
- Identify target threshold for the VE team.

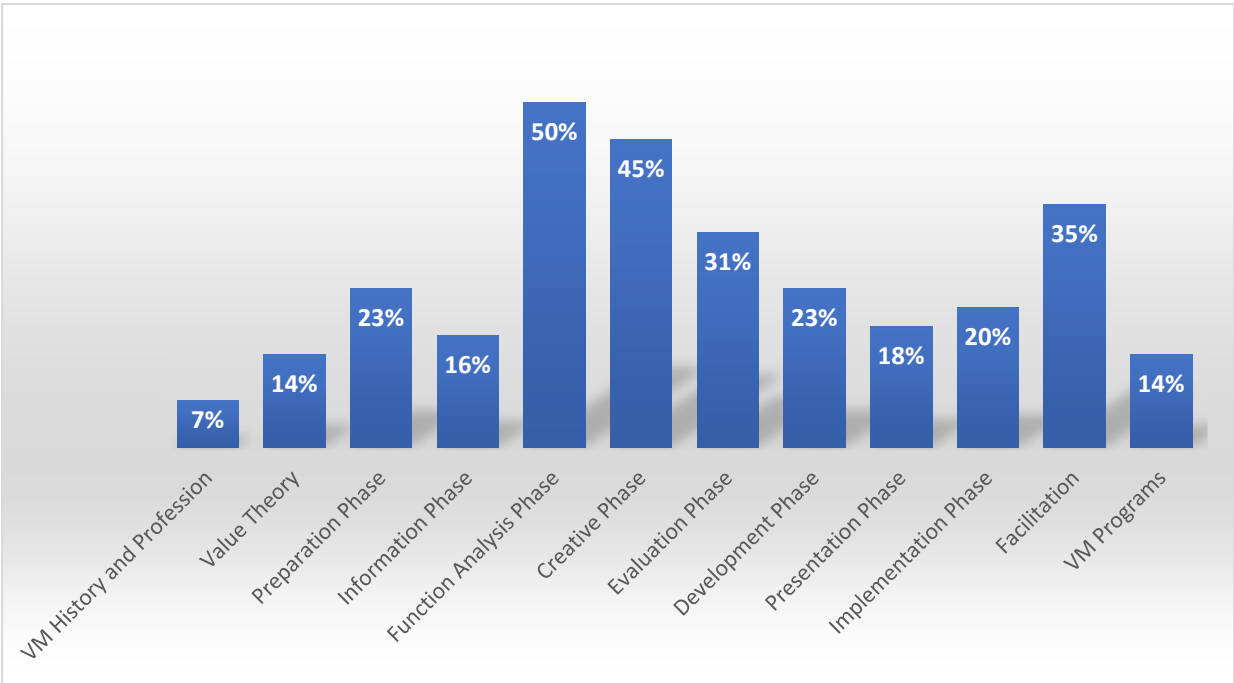
**Question 8.** The VMBoK Committee will be inviting SAVE Members to provide feedback on the draft VMBoK Guide in June - August, 2019. Please indicate if you are willing to participate in this process. Assume this will require a commitment of at least 8 hours of your time over a period of weeks. It is anticipated that the review sessions will be conducted via a web-conferencing platform.



Approximately 28 participants responded they would be interested in participating in the review of the draft VMBoK Guide.

Those that provided contact information will be invited to participate in the review process.

**Question 9.** If you are interested in participating in the VMBoK review process, please select no more than three topics below that you would be interested in focusing on. Note, for this question, we are using the terms "Preparation Phase" to connote the pre-study activities and "Implementation Phase" to connote the post-study activities.



**Question 10.** Are there any other major topics that you feel should be considered for inclusion in the VMBoK Guide?

40 participants provided additional comments.

- Facilitation Techniques
- Awareness of different Innovation Styles and Communication Styles will enhance the collaboration of the team. It can be included under people topics. Understanding Innovation styles help the facilitator to choose the creativity tool to adopt according to the result expected.
- No
- Certification process and CEU documentation
- None at this time.
- No
- Sample of the VMA and CVS exams (Q & A)
- Life Cycle Cost Analysis shall also be an important point of focus for VM Education.
- The goal of VMBoK
- Value business development and contracting. Case studies. Using software to make easy quick facilitation.
- Great effort. Thanks, Rob!
- Stakeholder Management
- Not all Value studies are the same, Product design is different from construction projects.
- Looks good
- Relation with Lean Relation with Systems Engineering Relation with project management. Timing of a VE-study Contracting (external) Value Engineers Relation with European Certification and its' cross certification (CVS and PVM)
- Life Cycle Analysis
- Where will the guide cover the decision-making processes around where and when to conduct 'studies' and where and when a 'study' is not appropriate. My general concern is that the decision to apply (or not) is either driven by a check box process or by people who do not understand the power of value methodology. Can this guide inform the people who make the basic decision to apply the methodology (or not) in specific situations? Can the guide inform those people who design check box processes or those people who are faced with a challenge to 'do something' and they are then faced with a choice - do we apply something we know about e.g. kaizen blitz approach or something we are unsure about e.g. value methodology approach ? Does your guide focus on 'how to do value methodology well' or is your guide also addressing the question 'when and how should we apply value methodology to achieve best results .... setting value methodology in context with other approaches to highlight when value methodology is a good approach / the best approach? - maybe some form of table of comparison of methodologies might be useful or maybe it is much simpler and cleaner to stick to the first question and focus on how to deploy value methodology well but then again the CVS should be able to make the case that value methodology is relevant (and more / less relevant than other approaches.... )' I hope my comments help.
- No
- Machine Learning

- No
- No
- I expect risk topics would be considered in the Guide.
- No
- Technical FAST Diagram and Customer FAST Diagram
- Facilitation skills
- I want you to advance world standardization as well as the United States
- SAVE International Standards of Conduct, Value Modeling, Financial Assessments (ROI, Simple Payback, Total Cost of Ownership)
- No.
- Yes. There are a skadillion different problem definition and problem-solving methods currently being offered by consulting firms and individual consultants. New (and old) CVS's should have at least the old "two-word abridgement" understanding of all the currently popular competitive offerings for the marketplace of help being offered to clients in our field of endeavor. For Example" VE = Analyze Function; Six Sigma = Eliminate Error; Operations Research = Model Behavior; Process Engineering = Eliminate Whitespace, and so on. Nobody must necessarily agree with my two-word abridgement choices (above) since those were just off the top of my head, however, there should be some impact-imagery that new (and old) practitioners can internally/mentally call on when engaged in broad, industry wide discussion. Hope you may find this thought useful. Joe
- How VM can help in defining a program and identify potential projects within it
- Understand your area of work (e.g. design/construction).
- How to promote genuine Value Methodology based on Functional Analysis (as opposed to "VE" without Functional Analysis used for "cost cutting").
- Yes, we are value engineering professionals not the society of fast diagram preparers
- Breaking the CSV into areas of expertise so that you have specific areas of certification would differentiate between strengths (broad knowledge is not the same as skilled knowledge) would give more credibility to the certification. It may encourage more support to SAVE from those VMAs who aren't going to bother getting a CVS because it is not time/effort beneficial to their credentials/career/demand.
- None
- Guidance on determining the duration of the VE team study, e.g., 2-, 3-, 4-, 5-day study. Each team leader needs to be able to understand the client's needs, probable budget for each, minimum to effectively address the project's needs.
- Analytical methods associated with the Function/Analysis phase, particularly qualitative, semi-quantitative and quantitative decision analysis methods.
- Report writing
- Follow the Job Plan!