

**PREPARING FOR VE SUCCESS THROUGH IMAGINATION**

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**ABSTRACT**

This paper describes how "imagining" success before and during the VE process can be used to "psyche up" for a study, prepare the scope, objectives and agenda for a study and help the study team *imagine* what their "success" will be. It describes how to use the VE Job Plan phases as a basis around which to *imagine* successful events leading to a successful Study.

**INTRODUCTION**

Imagination is defined as the power of the mind to form a mental image or concept of something that is not real or present. John Muir took this concept one step further when he said, "The power of imagination makes us infinite."<sup>1</sup>

Imagination has always been a part of our lives. We have dreams and hopes. We imagine the goal to be achieved in both our personal and our business lives. Yet, with the constant pressure to perform, people sometimes forget to use that imagination as frequently and as effectively as they could.

The power of imagination, supported by creativity and innovation, can help a VE practitioner visualize a successful VE Study before it even happens. How the study will look, sound and feel as it is conceived, conducted and concluded successfully, can all be defined through imagination.

**BACKGROUND**

The inspiration for this paper came as I read the article "Talking Heads".<sup>2</sup> The Author stated that: Successful people visualize themselves having successful experiences. They hear themselves making an important point, anticipating difficult questions and providing insightful responses. If telling a joke, they hear the joke in their head and visualize people laughing.

When I read "Talking Heads" in October 1992, I began to realize that my method for conducting VE followed the concept described in the article. Achievements expected from the study, staging for the study, and conducting the study were all imagined in advance. The images were then presented to the team as a tool that focused them on success. This concept, which I call "imagine success," when it is used properly, can enhance an already powerful tool, the VE Job Plan.

**IMAGINING SUCCESS FOR THE STUDY**

Imagining success for the study starts after the VE practitioner understands enough about the study problem to start developing success-oriented images. The VE practitioner focuses on building images that define success for the study by developing an image of:

- What is required to successfully achieve the expectation (objectives) of the study's requestor;
- How the study should proceed to be successful; and
- How the team should acquire the information needed to meet the requestor's expectations.

What is required – Scope Statement Sheet

I have been facilitating VE studies for almost seven years. One of the most important elements in each of the more than 60 studies I have facilitated was an accurate image of the study requestor's expectations (objectives). The scope statement sheet

is a basic tool that can help the facilitator and requestor to imagine what the objectives for the study are. Figure 1 is a sample of a generic VE Scope Statement Sheet. This sample contains brief definitions of scope, objectives, and deliverables. Figure 1 lists some possible objectives. The list of objectives is an idea list that can trigger specific images for the actual study.

Developing the scope statement sheet provides an opportunity for the VE practitioner and the study's initiator to discuss the problem or issue that led to the study, identify the boundaries for the scope of the study, define the image of what is expected from the study, as well as how to document that image. They also determine what the team needs to know to meet those objectives.

Objectives -- the images of what the study should produce -- are developed in relation to the study issue and what the team needs to know to resolve that issue. An image is visualized for how the solution will look, sound, or feel. Supporting this "solution image" is another image that depicts how much detailed technical knowledge is needed about the issue.

Initially, the scope statement sheet development session focuses on the technical issues. Once the technical perspective is clearly understood, the scope, objectives, and deliverables can be succinctly quantified and documented. When the requestor is comfortable with the technical basis, the focus shifts to determining what the team needs to know to achieve the technical objectives. Additional objectives, and sometimes deliverables, are then identified .

The additional objectives and deliverables usually relate to what items the team will track and document to demonstrate the knowledge gained in the technical arena. For example, a recommended method for waste water disposal might be the imagined results the initiator expects from the study. This is the technical objective. Other objectives are supporting objectives, or the imagined steps in the process of obtaining enough information to make a choice. Supporting objectives that help the team reach its goal in this instance might be the detailed options for waste water disposal, schedule limitations, and the pros and cons of each option.

Imagining objectives for the team and what the team needs to know to achieve those objectives provides an opportunity to discuss team membership, and how that membership relates to the study. Team member qualifications can be identified and individuals can then be chosen to best fit the qualifications.

**PROJECT SCOPE STATEMENT SHEET**

Project Title: Title of project or task No. Project Number  
 Location of VE Session: Location and time Dates:  
 Team Briefing Meeting: Location and time Date:

**TEAM MEMBERS**

NAME	Payroll	PHONE	MSIN	DISCIPLINE	CO.
	No.				
Initials, common					
Discipline or name, last name (TL)					specialty
Team Leader (TL)					

**FACILITATOR**

NAME	Payroll	PHONE	MSIN	DISCIPLINE	CO.
	No.				

**SCOPE**

Boundaries or limitations of the VE study during the time frame

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of the study.

## OBJECTIVES

Succinct statements identifying the goals of the team during the time frame of the study. Objectives can be tangible or intangible goals.

### Possible Objectives

Identify and Evaluate Optional Methods  
Reduce Cost  
Identify Primary Option  
Enhance Schedule  
Improve Effectiveness  
Verify Design  
Clarify and Quantify Scope  
Build Team  
Obtain Buy-in...Customer, Team, User  
Establish Requirements  
Increase Scope While Minimizing Impact  
Clarify Requirements on Cost and Schedule  
Clarify Objectives  
Streamline Process, Activities  
Verify Cost  
Instill Confidence in the Selected Option  
Document Study  
Increase Competitiveness Solve Problems

## DELIVERABLES

Tangible objectives resulting from the study that can be literally handed to management.

### Figure 1

How To Proceed -- Agenda

I once heard someone say that "the person who has an agenda is the person in control of the meeting." From my own personal experience, I know this statement to be true. The VE practitioner is responsible for controlling the VE process, during the study and one way to do that is through the use of the agenda. The agenda does several things. It helps the facilitator develop an image of how the study is to proceed. It creates, in the minds of the team members, an image of the study procedure. When written and reviewed with the team, it gives the facilitator the initial control of the study. The agenda creates group focus.

The agenda is developed based on the VE Job Plan and on the process of imagining success. Information gathered while developing the scope statement sheet supports the imagining process used to determine the agenda. Using the VE Job Plan to provide the basic elements of the agenda, the VE practitioner imagines how the study should proceed. At all times, the agenda is focused on achieving the study requestor's expectations. The facilitator may have to be creative or innovative in planning to achieve the objectives, but first must imagine what needs to be achieved.

If special techniques are required for the study -- such as nominal group technique or paired comparison -- imagine how the technique blends with the VE Job Plan. Based on the discussions about the team members held during the development of the scope statement sheet, imagine what each person will be like and how each one might react to the study agenda. Then imagine how the study should flow and formulate the answers to the following questions.

- When and how should information be given to the study team?
- Are any special techniques needed to gather that information?
- How much time should be devoted to gathering information?
- When is the best time to develop functions?
- When should function analysis occur, and how much time should it take?

- How and when should a sense of urgency be developed?
- How can addressing personal issues enhance the study's progress?
- How much time will be needed for brainstorming?
- When and how should the information and ideas generated during brainstorming be included in the process?
- Are any special approaches needed to properly evaluate the ideas?

Always be ready to accommodate change. The original agenda was imagined based on what was known before the study was started. As the study progresses, and more information becomes available, the objectives may have to be re-imagined and the agenda adjusted accordingly. Usually, the objectives that are re-imagined relate to the team's informational needs. Occasionally, the study requestor's expectations change.

Figure 2 is an example agenda that follows the VE Job Plan but has been adapted to incorporate specific needs of the study requestor. This agenda was based on a study to choose the best waste water discharge option. Some facilitators choose to use the same agenda slides for all studies, but I prefer to develop and write the specific agenda for each study as was done for the actual study, Figure 2. This approach helps me to consciously imagine how I want the specific study to proceed, as well as visualize what I want to be seen, heard, and felt.

## AGENDA

### Day 1

0730 Welcome/Agenda  
Guidelines and Expectations  
Scope Statement Sheet  
0745 Info Gathering--Key words  
0930 Break  
0945 Continue Key Words  
1130 Lunch  
1230 Continue Key Words  
2:30 Break  
2:45 Continue Key Words  
4:30 Finish day

### Day 2

0730 Day 2 Agenda  
Scope Statement Sheet  
0745 Functions for City Discharge  
0815 FAST Diagram  
0930 Break  
0945 Continue FAST Diagram  
1130 Lunch  
1230 Continue FAST Diagram  
2:30 Break  
2:45 Select Functions for Brainstorming  
3:15 Begin Brainstorming (focus on improvements to Discharge to City schedule)  
4:30 Finish Day

### Day 3

0730 Agenda for Day 3  
Scope Statement Sheet  
0745 Finish Brainstorming  
0900 Evaluation Round 1 (Eliminate Nonsense)  
0930 Break  
0945 Continue Round 1  
1130 Lunch  
1230 Continue Round 1: Start Round 2 (Develop Criteria, Categories)  
2:30 Break  
2:45 Continue Round 2  
4:30 Finish day 3

### Day 4

0730 Day 4 Agenda  
Scope Statement Sheet  
0745 Evaluation Round 3, Develop recommendations to improve Discharge to City schedule  
0930 Break  
0945 Continue Round 3

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1130 Lunch  
1230 Develop Criteria to chose City  
Discharge or continue L-045  
2:30 Break  
2:45 Make Selection and Document  
Justification for choice  
4:00 Develop Action Plan supporting the  
Selected Choice  
4:30 inish Day

Day 5 (Last Day)  
0730 Agenda for day 5

Scope Statement Sheet  
0745 Finish Recommendations, Finish Action  
Plan, Develop Management Presentation  
0930 Break  
0945 Finish Management Presentation  
1130 Lunch  
1230 Dry Run Management Presentation  
2:00 Management Presentation  
4:00 Finish Study

**Figure 2**

How To Acquire Information -- Guidelines, Expectations, and Key Words

Guidelines and expectations serve several purposes. First, they specify how the team will operate and channel the behavior of the team members during the study. Second, they identify what the team members can expect to see, hear, do, and feel during the study. Similar to the agenda, the guidelines and expectations help the facilitator establish the initial control over the study. Guidelines and expectations need not be complicated and may be as simple as the following:

- Active listening -- let others finish speaking; questioning for clarification not objection
- Communications -- filters
- Use of Flip Charts
- Frustrations -- lack of time, not enough detail, can't solve problem immediately
- Evolution -- facilitator to team member transition

It is extremely important to imagine any frustrations that the team members may experience during the study process, and then discuss them with the team.

Often the guidelines and expectations are similar for every study. However, like the case for the agenda, it is better to individually develop and write the list after consciously imagining what may happen during the study and imagining what the team might encounter.

Developing key words is a method for imagining what will elicit information from the team, and which information needs to be discussed by the team. Key words are individual words or short phrases used to solicit information during the Information phase of the VE Job Plan. Key word development starts when the VE practitioner and the study requestor discuss what information the team needs to know to perform the study. Using that information as background, the practitioner imagines which words or phrases will prompt the team to openly provide the required information. A list of the key words is used to generate discussions, leading to information gathering among the team members and any invited guests. This list is also a tool that reminds the study requestor and the team that certain subjects need to be discussed.

### IMAGINING SUCCESS FOR THE TEAM

Preparing the team for success is based on using the four tools described above in conjunction with the process of visualizing success for the team. The VE practitioner uses the images developed in the preparation process to focus the team on the images of success.

#### Team Briefing

The purpose of the team briefing is to educate the team members about the VE process and to inform them of the study objectives and what they should expect to occur during the study itself. The team briefing, held prior to the study, is the VE practitioner's first opportunity to develop the image of what the study must achieve in order to be successful.

Open discussion is an important component of the briefing. Most comments at this point relate to the scope study sheet and pertain to clarification of scope, objectives, and deliverables. Since the scope statement sheet is a "living document," discussion and clarification are encouraged. Such discussion assures that team members are focused on the study objectives, and deliverables and clearly understand the image of success.

#### The Study

On Day 1 of the study, a second opportunity arises for reinforcing the image of success. At this point, the agenda, guidelines, and expectations are reviewed to reinforce the image of the process that will lead the team to success. The scope statement sheet is again reviewed to continue to focus the team on the image of what constitutes success for the team and the study.

Throughout the study, the agenda for each day is reviewed at the beginning of the day. This review has two main purposes: to show progress (or lack of) and to continuously focus the team on the image of how to succeed. The scope statement sheet is also reviewed daily to focus the team on the image of what needs to be accomplished to succeed.

The beginning of each phase of the VE Job Plan also presents an opportunity to create an image of what that phase entails. Each phase is an extension of the previous phase, the results of the pending phase will be used for the development of the subsequent phase.

#### Management Presentation

As the team begins to develop its recommendations, it should collectively imagine how the presentation will work. Recommendation format and the pros and cons and action plan for the recommendation are developed concurrently with the final steps of the evaluation. The team should imagine the points they will use to sell their choice to management. They should imagine the support they might get, who might support them, and when they might support them. Each team member should also imagine any voices of opposition, resolving that opposition, and, conversely, how to take advantage of any support.

A practice run through makes it possible to "polish" the presentation before giving it to management. More importantly, it allows the team to determine if the image they want to create and to sell is being created.

### PRECAUTIONS TO THE APPROACH

Imagination and creative approaches to problem solving are effective in creating a successful study. However, imagination should be controlled and used in moderation. Imagining in too fine a detail can create problems.

It's important not to over-rehearse. Imagine what you want to achieve and how you want to achieve it, but don't get so involved in your imagined scenario(s) that you do not listen during or react to the real situation. Remain open to the changing situation, and remember there is no substitution for live interaction. Being too critical and over analyzing yourself or the team or the process interrupts the flow of the process, creating problems in accomplishing your objective.

### SUMMARY

Imagination is one of the keys to success. Imagination can enhance and improve the successful application of the VE process. The use of imagination can be an effective tool for the VE practitioner during the initial VE study development phases. As a tool, it can be useful for creating images of the following:

- The study requestor's expectations and objectives;
- How a successful study should proceed; and

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- How the facilitator wants the team to reach an increased level of knowledge and to develop recommendations.

Imagination used with the VE Job Plan is a powerful tool that leads to success for the VE practitioner, success for the team, and success for the study initiator.

### REFERENCES

1. Readers Digest, January, 1993
2. "Working Smart", *National Institute of Business Management Magazine*, October, 1992