

## **PERFORMING VALUE STUDIES WITH PIZZAZZ, OOMPH and SUBSTANCE: LESSONS LEARNED**

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### **ABSTRACT**

Within a wide range of practices, workshops may be conducted with pizzazz, oomph or substance that will be sustainable in practice, but perhaps typically not with all three. There may be a range of effectiveness in which value workshops are characterized by (a) extremely hard work during very long days, yet tremendously productive, leading to implementation of significant project improvements, to (z) where workshops are slick, lots of fun, not particularly hard work but not really productive of tangible results. Herein lies the challenge of energizing the value methodology: to make the value methodology fun, productive and sustaining. This session provides a lively, provocative and interactive response to this challenge.

### **OUTLINE**

Traditionally, the value workshop, is given a pre-eminent place within the value study process. Many clients think that an “all singing – all dancing” workshop, followed by receipt of thick report document, will fulfill their needs or the needs of their boss, client or funding / approval agency.

Despite the tremendous power of the value and related FAST methodologies, there is a universal, relatively slow uptake of their potential. Is this because the value profession tends to promote the methodology from within, rather than viewing the methodology from the perspective of possible users who have a vast array of other management tools from which to choose? However, in the bigger picture, there is so much more than the workshop to be considered for a truly successful value study and a sustaining value management program. From an overall perspective, the workshop stage is really quite straightforward, whereas useful initiation can be most difficult and study follow-up may not be conducted or may be inconclusive.

Are the overriding critical success factors for the value methodology as follows?

- Value Workshop – participants leave the workshop smiling in the knowledge that consensus has been reached and likely would otherwise not have been. (The converse would be that participants agree that the results are worthwhile but the method for obtaining them was too long, drawn out and disruptive to the other priorities on their desks.)
- Value Study - workshop proposals have been accepted, were implemented in practice and made a real difference to the project and participants.
- Value Program – the value methodology is used willingly as a matter of course for development and improvement of programs, projects and services, where applicable. Repeat clients ask for a FAST diagram to be provided (as distinct from insisting it be omitted).

Are today's young professionals impressed or somewhat turned-off that the value methodology is of World War 2 vintage? Would these people be more aligned to the

value methodology if it were described as a well established methodology that has been continuously revitalized to embrace the very latest management thinking and address today's most pressing issues?

Why do so many mid to higher management professionals feel threatened by being involved in the application of the value methodology? Is it likely a combination of fear over loss of control or profile in the short term and loss of turf in the longer term? To overcome this, an alternative to the single 5-day intensive workshop approach may be appropriate. By using a "bite-sized chunks" study approach, participants and initiators may feel more comfortable. Indeed, the facilitator may feel more comfortable that consensus on overall direction is being derived more satisfactorily.

Based on lessons learned, "the way we have always done it" will be challenged and constructive improvements suggested. So often, client expectations are very high while preparation and team member orientation are disproportionately low. It is little wonder that the value methodology does not gain popularity in such circumstances. A holistic, balanced approach to use of the value methodology is advocated, rather than succumbing to the pressures of clients who insist they only want "a quick bit of facilitation". Regarding the report, what do final, what do clients really want as opposed to what do we think they want? Who is/ are the real client(s)?

Despite its power, FAST diagramming may also be unpopular with some workshop participants. Sometimes, facilitators either avoid FAST because of time constraints and participant non-acceptance or they put a group of first-time value methodology participants through the hoops of following a sub process that appears to of only marginal relevance at best. FAST diagramming is more effective if done initially by a small group in advance of the main workshop(s). Levels of abstraction include a) strategic diagnosis of program/project situation, b) establishment of stakeholder roles and approval gates, c) strategic framework for examining the program/project, d) specific examination of critical issues. Verification and extension of the FAST diagram(s) can be done effectively during the main workshop. Alternatively, especially for strategic studies, the equivalent output of a FAST diagram can be obtained by the facilitator following a general FAST approach but recording the information on well orchestrated lists rather than on the traditional chart comprising many boxes. Traditionalists may well argue against this, but which is more important: to adhere rigidly to time honored practice or to move the whole process along and make it a pleasantly memorable experience such that participants will want to take part in future value studies?

### **Key Points**

- A holistic, staged approach to applying the value methodology
- The pace and timeframe for study initiation, workshop preparation, workshop(s), interim deliverables, final output, acceptance and implementation varies significantly for different stakeholders and circumstances. Allowance should be made accordingly
- Careful telescoping of focus of participants from a broad scope to specifics is required

- The initiation stage of a value study should be conducted formally; this may include a separate workshop to develop consensus on program/project needs, strategic objectives and process. Inadequate strategic diagnosis of the situation and potential ways forward will cause loss of workshop oomph
- The workshop preparation stage should be conducted formally. Inadequate preparation will slow the early part of the workshop and cause loss of workshop pizzazz
- An extended workshop judgement phase provides a better bridge to the workshop development phase and improves pizzazz, oomph and substance
- For complex situations, the overall study timeframe should include for the milestone activities of reviewing interim outputs together with broadening stakeholder consensus
- Don't get hung up on using fancy/detailed tools. The result is of more interest (to the client) rather than the details for reaching it.

### **Knowledge & Skills To Be Taken Away**

- Understanding that proper value study (pre-workshop) initiation and post workshop follow-through is essential to sustainable value study results
- Realization that a "one-size fits all" approach to applying the value methodology is often inappropriate
- Knowledge of how to improve participant effectiveness and satisfaction such that end results are sustaining in practice.
- Use of Focus diagramming to improve participant interest

### **Relevance**

- Increases popularity of the value methodology
- Increases stakeholder commitment and action
- Starts with the very early application of the value methodology to define program(s) effectively and to "drive" development of subsequent projects
- Promotes better understanding of what the Value methodology does
- Consensus building approach for difficult situation.
- Brings enjoyment and accomplishment to the participants
- Focuses and sharpens multi-disciplinary, inter-organizational teams
- Cuts across organizational boundaries and overcomes institutional resistance.

### **Innovation**

- Enhancement of the traditional VE approach and methodology
- Provides an alternative to traditional FAST diagramming while still utilizing the principles
- Establishes a holistic business planning and project management framework
- Brings substance and sustainability to the process of applying the value methodology
- Overcomes institutional and personal resistance to initiating value studies and implementing the recommendations.