

Appendix II: Detailed Agenda for 40-hour, 5-day, VM Module I Certification Training Workshop

Note: SAVE International requires participants to attend the *WHOLE* 40-hour workshop for award of the certificate of completion. **There can be no exceptions.**

Workshop Timings

5 days: Start 8.00 a.m.; Lunch 12.15 to 1.15 p.m.; Breaks: 10.00 – 10.15 a.m. and 3.00 - 3.15 p.m. Adjournment: 5.30 p.m.

DAY 1	Activity	<u>Reference in Guide</u>
7.45 a.m.	Registration /Administration	
8.00 a.m.	Introductions	
	<u>SETTING THE SCENE</u>	
	COURSE OVERVIEW & EXPECTATIONS	PART A
	1.1 Synopsis of VM	Section 1
	1.2 Example VM Training Workshop Assignments	
	1.3 Levels of VM Certification	
	1.4 What to Expect from the Training Workshop; Learning Objectives	
	1.5 Course Organization	
	1.6 Training Workshop Protocol & Characteristics	
	1.7 VM Study Considerations	
9.15 a.m.	INTRODUCTION to the VALUE METHODOLOGY	Section 2
	2.1 The Value Methodology Approach	
	2.2 Why Use the Value Methodology?	
	2.3 Project Uncertainty and Reasons for Unnecessary Cost and Poor Value	
	2.4 Value Terminology	
	2.5 Best Time to Apply VM	
	2.6 VM Study Initiation: Key Points	
	2.7 Initial VM Worksheets & Input-Output Package	
10.00 a.m.	<i>Telephone & Comfort Break</i>	
10.15 a.m.	2.8 Team Project Time (1 of 10):	
	- Initial Introduction to the Training Workshop Project(s)	
	- VM Study Premise	
	- Formation of Team(s); Roles	
	- Workshop Areas(s)	
11.00 a.m.	<u>STARTING A VALUE STUDY</u>	PART B
	JOB PLAN, TEAM CONSIDERATIONS and WORKSHOP LOGISTICS	Section 3
	3.1 Systematic Team Approach	

**Day 1
Continued****Activity****Reference
in Guide**

- 3.2 VM Process Stages
- 3.3 The VM Job Plan
- 3.4 The VM Team
- 3.5 Facilitation Aspects
- 3.6 Team Dynamics & Considerations
- 3.7 Workshop Venue & Supplies

(VM Study Theme a.)

12.15 p.m.

Lunch

1.15 p.m.

WORKSHOP FOUNDATION**Section 4**

Pre-Workshop Information: Planning and Preparation For Summary Information Presentations:

(VM Study Theme a. Cont.d)

- 4.1 Overview of Pre-Workshop Requirements
- 4.2 VM Study Focus
- 4.3 Initial Diagnosis & Task Familiarization
- 4.4 Workshop Input Package
- 4.5 Cost Models
- 4.6 Summary Information Presentations
- 4.7 Interim Recap
- 4.8 Pre-Workshop Checklist

2.15 p.m.

- 4.9 **Team Project Time (2 of 10):**
- Continue Project Familiarization
 - Plan Workshop Input Package & Output Report Framework
 - Preparation of Basic Cost Model(s)

3.00 p.m.

Telephone & Comfort Break

3.15 p.m.

**CONDUCTING A VALUE WORKSHOP
INFORMATION PHASE****PART C**

- 5.1 Objectives of the Information Phase
- 5.2 Techniques
- 5.3 Key Questions to Answer
- 5.4 Information Gathering
- 5.5 Example Information Worksheets
- 5.6 Summary Information Presentation(s)
- 5.7 Process Summary, Information Phase

Section 5

(VM Study Theme b.)

3.45 p.m.

- 5.8 **Team Project Time (3 of 10):**
- Preparation of Workshop Input Package;
 - Prepare for Phase 1 Information Phase Summary Presentation(s)

4.45 p.m.

- Rehearse and Fine-tune Team Information Summary Presentation(s)

5.20 p.m.

Recap on Day 1

5.30 p.m.

Adjourn Day 1

DAY 2	Activity	<u>Reference in Guide</u>
8.00 a.m.	Deliver Information Phase Presentation(s)	
9.30 a.m.	FUNCTION ANALYSIS PHASE 6.1 Objectives of the Function Analysis Phase 6.2 Techniques 6.3 Key Questions 6.4 Function Identification	Section 6 (VM Study Theme c.)
10.00 p.m.	<i>Telephone & Comfort Break</i>	
10.15 p.m.	6.5 Analysis By Function 6.6 Function Diagramming - F.A.S.T. Basics - Classic FAST - Technical FAST - Customer FAST - Diagramming Exercises 6.7 Process Summary, Function Analysis Phase	
12.15 p.m.	<i>Lunch</i>	
1.15 p.m.	- Basic and Secondary Function; Worth - Function-Cost - Fast Diagramming - Group and Individual Analysis Assignments - Continue Function Analysis Practice	
3.00 p.m.	<i>Telephone & Comfort Break</i>	
3.15 p.m.	6.8 Team Project Time (4 of 10): Review Practice FAST Assignments and Areas of Difficulty	
4.00 p.m.	Complete Continue Function Analysis and Development of FAST Diagram for Study Project	
5.20 p.m.	Review Progress	
5.30 p.m.	<i>Adjourn Day 2</i>	
DAY 3		
8.00 a.m.	Review Project FAST Diagrams for Each Team	
9.00 a.m.	Team Project Time (5 of 10): Identify Target Areas of Opportunity for Value Improvement	
10.00 a.m.	<i>Telephone & Comfort Break</i>	
10.15 a.m.	CREATIVITY PHASE 7.1 Objectives of the Creativity Phase 7.2 Key Questions 7.3 Obstacles to Improvement 7.4 Creativity Techniques 7.5 Rules for Creativity	Section 7 (VM Study Theme d.)

DAY 3
Continued**Activity**Reference
In Guide

- 7.6 Ideas Stimulators
- 7.7 Process Summary, Creativity Phase
- 7.8 **Team Project Time (6 of 10):**
 - Ideas Generation
 - Creative use of F.A.S.T.

12.15 p.m.

Lunch

1.15 p.m.

Team Project Time (6 of 10):

- Creativity (continued from before lunch)
- Complete Creativity Phase Worksheets

2.00 p.m.

EVALUATION PHASE

- 8.1 Objectives of the Evaluation Phase
- 8.2 Key Questions
- 8.3 Evaluation Criteria
- 8.4 Evaluation Techniques
- 8.5 Ideas Rating
- 8.6 Criteria Weighting
- 8.7 Identify More Alternatives
- 8.8 Process Summary, Evaluation Phase

Section 8(VM Study
Theme e.)

3.00 p.m.

Telephone & Comfort Break

3.15 p.m.

8.9 Team Project Time (7 of 10):

- Identify/ Refine Ideas Evaluation Criteria
- Conduct Evaluation Phase for Study Project
- Encourage Additional Ideas
- Complete Evaluation Phase Worksheets

5.20 p.m.

Review Progress

5.30 p.m.

*Adjourn Day 3***DAY 4**

8.00 a.m.

Re-visit Creativity; Squeeze for More Ideas

Section 9

8.30 p.m.

DEVELOPMENT PHASE(VM Study
Theme f.)

- 9.1 Objectives of the Development Phase
- 9.2 Key Questions to Answer
- 9.3 Techniques
- 9.4 Ideas Development

9.00 a.m.

Project Cost Estimates

- 9.5 Capital Cost Estimating
- 9.6 Life Cycle Costing
- 9.7 Process Summary, Development Phase

10.00 a.m.

Telephone & Comfort Break

10.15 p.m.

9.8 Team Project Time (8 of 10):

- Develop Proposed Systems
- Verify Technical Suitability
- Develop Capital Cost Estimates

DAY 4
Continued**Activity**

- Prepare Life Cycle Cost Analysis
- Test Proposals For Acceptability
- Complete Development Phase Worksheets
- Identify Critically Influential Items

12.15 p.m.

Lunch

1.15 p.m.

OUTPUTS and DELIVERY
PRESENTATION PHASE

- 10.1 Objectives of the Presentation Phase
- 10.2 Techniques
- 10.3 Selection of Preferred Option
- 10.4 Interim Output Presentation
- 10.5 Presentation Outline
- 10.6 Proposals Summary Sheets
- 10.7 Workshop Deliverables
- 10.8 Process Summary

PART D**Section 10**(VM Study
Theme g.)

2.15 p.m.

10.9 Team Project Time (9 of 10):

- Refinement of Proposals
- Formulate Scenarios / Grouped Options

Section 10

3.00 p.m.

Telephone & Comfort Break

3.15 p.m.

ACCEPTANCE & FOLLOW-THROUGH

- 11.1 Completion of Outstanding Workshop Tasks
- 11.2 Final Output Presentation
- 11.3 Study Report
- 11.4 Decision Meeting
- 11.5 Why Top Management Support Is Essential
- 11.6 Overcoming Implementation Barriers
- 11.7 How to Maintain Interest in VM

4.00 p.m.

Team Project Time (9 of 10 Cont.d)

- Score / Rank Scenarios
- Consolidate Outputs
- Formulate a Plan for Implementation
- Revise CAPEX and OPEX Cost Models
- Revise Value Profile and Index (if used)
- Preparation of Output Presentation
- Completion of Project Worksheets
- Confirmation of all VM Study Reporting Deliverables.

Section 11(VM Study
Themes
h. and i)

5.20 p.m.

Review Progress on Outputs

5.30 p.m.

*Adjourn Day 4 (expect a late evening to
complete required outputs)*

DAY 5	Activity	<u>Reference in Guide</u>
	OUTPUT PRESENTATION(S) & FEEDBACK	
8.00 a.m.	11.8 Team Project Time (10 of 10): - Deliver Group Output Presentations and Packages to Simulated Management Panel - Receive Feedback	
10.00 a.m.	<i>Telephone & Comfort Break</i>	
10.15 a.m.	<u>SUPPLEMENTARY TEXTS</u> MORE ON VM FUNDAMENTALS 12.1 Characteristics of the Value Methodology 12.2 Example Applications of VM 12.3 History of the Value Methodology 12.4 How VM is Different 12.5 Where is VM Applicable? 12.6 Selection of Projects for VM Study; Objectives 12.7 Glossary of VM Terms 12.8 Explanatory Note on Interpretation of VM 12.9 A Broader View of A Value Study	PART E Section 12
12.15 p.m.	<i>Lunch</i>	
1.15 p.m.	APPENDICES	Section 13
3.00 p.m.	<i>Telephone & Comfort Break</i>	
3.15 p.m.	SUMMARY & WRAP UP - Review of Methodology and Events - Save International - Review of Key Learnings - Recap on Areas of Difficulty - Complete Personal Action Plan - Workshop Evaluation Form - Critique of Workshop: 2-Way Feedback	
4.30 p.m.	- Award of Module I Certificates - Group Photographs	
5.30 p.m.	<i>End of VM Module I Training Workshop</i>	

See next page for the optional AVS examination