

PAPER TITLE: THE PATH TO CVS® IN 12 STEPS

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PAPER ABSTRACT:

Having passed the AVS exam, this paper's author was determined to achieve "Certified Value Specialist" within two years. While her journey to certification was longer than she had originally anticipated, she learned a lot about the VM methodology and herself along the way. At times, the dreaded "certification package" and "CVS® exam" seemed overwhelming; how could she manage this in addition to her other work and family responsibilities? While the path to CVS® can seem daunting, this paper focuses on the lessons learned from the school of hard knocks that the author found helpful in her journey. The learnings presented here expand on the *SAVE International® Certification Program Manual* (13th edition, effective January 9, 2015) with the author's personal observations that may offer additional guidance to those on the fence about taking further steps to certification.

ABOUT THE AUTHOR:

Patrice Miller is a Certified Value Specialist and Managing Partner of RHA, LLC, a woman-owned business headquartered in Arizona. Having worked in the Architecture/Engineering/Construction industry for over 20 years, she leads teams through the SAVE International® value methodology to improve project performance and lower project cost. She teaches the Module I workshop and is advisor to several AVS candidates pursuing their CVS®. Patrice is President of the SAVE Arizona Chapter. She earned her Master's in Business Administration from Arizona State University in 2002. Patrice lives in Scottsdale with her husband (Mark), two children (Colin and Elise), and dog (Hyde).

INTRODUCTION

Of the 1043 SAVE members, 79% are Associate Value Specialists, with the balance either Certified Value Specialists or Value Management Practitioners, 20% and 1%, respectively (source: *SAVE International® Member Directory*). I was curious about the low matriculation of AVS to CVS® certification and, in an informal survey of AVS members; I learned that many were (like me) more than a bit daunted by the process of undertaking the CVS® certification process.

From my personal experiences (both successes and failures), I have developed a greater understanding of the certification process, its goals, and my own strengths and weaknesses. My hope is that an AVS struggling to overcome their fear of taking the next step to certification will be encouraged by my CVS® journey. While simple, the CVS® path is not easy. During my effort, I sought guidance from existing CVS®s, studied course materials, participated in professional applications of the materials, and obtained a clarity of process and purpose that arises from the school of hard knocks. I am sharing the following 12 steps to progress from an AVS to a CVS® as a guide to those desiring to undertake this journey. I hope the 12 steps will focus your energy productively and remove some of the uncertainty in the process. And, I hope you will pursue a CVS®, as it has been one of the most expanding and enriching experiences of my life.

STEP 1: COMPLETE MODULE I / PASS AVS EXAM

Either by design or chance, you may be enrolled in an approved Module I workshop where you will learn the basics of the value methodology. At the conclusion of the workshop, you may elect to take the AVS exam, a two-part exam consisting of multiple-choice questions on VE fundamentals and FAST. Having completed the Module I workshop and passed the AVS exam, you have completed the first step toward certification and, if you so choose, start your journey toward CVS® certification.

Suggestions:

- Pay attention during the Module I workshop as the material may not be intuitive; it is a new way of thinking
- Ask questions to further your understanding
- Each evening, review materials from the day
- Know and understand the Job Plan, questioning what is unclear
- Practice FAST diagramming
- Study materials for exam
- Get a good night's sleep prior to exam
- Bring #2 pencils for the exam

STEP 2: SELECT ADVISOR

The *Save International® Certification Program Manual* (page 6) outlines the requirements for and responsibilities of an advisor. Your advisor may be your Module I instructor or an experienced CVS® practitioner in the industry. Choose wisely and, if the relationship doesn't work, select another advisor and inform SAVE of the change. From my experience, most practitioners in the industry are more than willing to help a practitioner-in-training; however, practitioners are busy leading studies, managing their business and personal affairs. Your responsibility is to take the initiative in checking-in with your advisor regarding your progress and to ask questions or express concerns regarding certification.

Suggestions:

- Select an advisor who is willing and available to guide you through certification process; this may take a few years – will and can they commit for that length of time?
- Schedule initial meeting with advisor to map out plan for certification
- Check-in routinely with advisor on your certification plan
- Review your scholarly paper topic with advisor and have him/her review your paper
- Review your certification package with your advisor and have him/her sign-off on application form
- Thank your advisor for his/her time in moving you forward towards certification

STEP 3: ACCUMULATE CERTIFICATION POINTS

As function analysis is the very heart of value engineering, accumulating certification points is the meat of your learning and development as a value practitioner. Each of the three categories – Practice VM, Learn VM, Share VM – is detailed in the *Save International® Certification Program Manual* and should be closely followed and tracked.

Practice VM Suggestions:

- Get your employer’s support for certification and let them know the benefits to the company
- Ask your advisor and other practitioners their willingness to have you serve as a co-facilitator on VM studies; many, if not all, of these may be on your own time and dime so be willing to make the investment
- If possible, try to serve as either a team member or a co-facilitator with different practitioners; each has their own style, and learning various techniques will assist you on the path in developing your own style.

Learn VM Suggestions:

- Attend SAVE International or other VM conferences as they offer great peer networking opportunities, a chance to learn new techniques and best practices, and develop lifelong friendships
- Participate actively in your SAVE Chapter and, if you don’t have one in your area, start a Chapter
- Attend webinars; SAVE International has several webinars on-line that will help you earn your Learn certification points

Share VM Suggestions:

- Write an article for InterActions or Value World about a new application of VM or an event in your Chapter
- Present at a SAVE or other conference in your industry promoting VM – a great way to spread the word!
- Serve in a leadership position on your Chapter board
- Offer to present at other types of professional organizations at their luncheons
- Offer to do “lunch and learns” at companies and public agencies; it provides a great learning opportunity for their staff as well

STEP 4: ORGANIZE MATERIALS

While I like to think that “organizational skills” is one of my strengths, I was surprised to learn how much documentation was required for the certification package. The *Save International® Certification Program Manual* provides a guide to organize your materials and a spreadsheet to track your certification points (CPs).

Suggestions:

- Start with the end in mind – begin tracking all your certification points by each category (**Figure 1**)

The image shows a screenshot of a spreadsheet titled "SAVE International CVS - Initial Application Summary Worksheet". The spreadsheet is organized into several sections. At the top, there are fields for "Applicant Information" including Name, Title, Company, and Address. Below this is a section for "Certification Points" with a table that has columns for "Category", "Activity", "Points", and "Total". The table contains numerous rows of data, likely representing different activities and their corresponding certification points. The bottom of the spreadsheet shows a summary of the total points earned in each category and a grand total.

Figure 1

- Purchase an expandable file folder for organizing documentation, i.e., Module I and II certificates, workshop documentation, conference attendance, etc. (Figure 2)
- Stay up to date with this process, trying to find the documentation later can be a daunting task



Figure 2

STEP 5: COMPLETE MODULE II

At a minimum of six months after completing the Module I workshop, you are eligible to take the Module II seminar. My only suggestion here is that you may wish to wait until you have practical experience in leading workshops and/or serving as a team member to make the Module II seminar more meaningful.

Similarly, I had several years of experience as a manager with my previous employer before embarking on my MBA; because I had the business background, I was able to more fully understand what was being taught and got more out of the experience.

STEP 6: WRITE SCHOLARLY PAPER

I often hear that this is the largest obstacle for those considering moving from AVS to CVS®. I confess that I will procrastinate in writing a paper up until the last minute. Why? For me (and maybe you), it was choosing a topic that I thought my audience would be interested in reading.

Suggestions:

- Choose a topic that you love; for my scholarly paper, it was my role as a marketing professional and I used the value methodology to “Build Better Proposals”
- Start with small bites; an outline will help you structure your thoughts
- Review and discuss your topic and outline with your advisor
- Do your research and give credit to the work of others you incorporate into your paper
- Follow guidelines prescribed in the *Save International® Certification Program Manual*

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STEP 7: ASSEMBLE PACKAGE

If you’ve taken Step 4, Organize Materials, than you are well on your way to having your certification package assembled and ready for your advisor’s review. You may want to look at your package as a marketing proposal; it should be error-free, easy to read, and professional-looking.

Suggestions:

- Make it easy for the certification reviewer to navigate your package; this may include a Table of Contents (Figure 3), page numbering, dividers/tabs, and electronic bookmarking

Application (signed and dated by applicant and advisor)	
Certification Matrix & Summary Worksheet	
AVS Certificate	
Tab 1 -	Module I Certificate, Module II Certificate
Tab 2 -	Perform VM Summary and Documentation
Tab 3 -	Learn VM Summary and Documentation
Tab 4 -	Share VM Summary and Documentation
Tab 5 -	Scholarly Paper: Build Better Proposals Using VE Tools

Figure 3

- Check, double-check and triple-check that CPs will meet SAVE certification criteria, that the certification matrix (Excel spreadsheet) is complete and tallies correctly, and all supporting documentation is provided
- Use spell-check; typos are unprofessional and don't reflect well on you and your submittal

STEP 8: SUBMIT PACKAGE

After your advisor has reviewed your certification package and signed the application form, then you are ready to send. SAVE International® has made this easy for CVS® candidates; an electronic submittal (PDF) is all that is required. Please note that it may take several weeks for your package to be approved by reviewers, who are volunteers and have other responsibilities.

When I received word that my certification package was accepted and I was eligible to take the CVS® exam, I was thrilled! I was inching ever closer to my goal, thinking that the end was in sight. The reality was that I had to experience failure before I could achieve success!

STEP 9: PRACTICE FAST

True confession: I did not pass the CVS® exam the first time. What really hung me up and out to dry was Function Analysis. Because this is the very heart (and soul) of VM, a CVS® candidate must be able to identify and classify functions, and then build a FAST diagram. If I was leading teams through this part of the job plan, I had best be knowledgeable and experienced in Function Analysis. I wasn't there yet. What I learned was I needed more PRACTICE.

Suggestions:

- Practice, practice, practice – on everyday objects – and have your advisor (or trusted CVS®) review
- Read monographs (SAVE International website) and books on Function Analysis and FAST; a helpful source to further my understanding on Function Analysis and FAST was/is Donald Parker's *Value Engineering Theory*

STEP 10: TAKE EXAM

In addition to practicing FAST, you should be prepared for all sections of the exam. SAVE International has an excellent *Certification Examination Study Guide* that organizes study materials by section and refers you to other resources to further your knowledge of a particular area. Review these materials, your Module I and Module II materials, the Value Methodology Standard, and the SAVE Body of Knowledge (*Value Methodology: A Pocket Guide to Reduce Cost and Improve Value through Function Analysis*).

Exam Day Suggestions:

- Bring sticky-notes, #2 pencils and scratch paper (if allowed; the school that proctored my exam provided these for me)

- Pace yourself; each section of the exam is given “suggested” time limits – use these so you have time to complete the entire exam
- Relax – you have been working hard to get to this point, you are the expert

STEP 11: CELEBRATE SUCCESS

When you receive the email stating that you have been approved as a CVS®, celebrate! You have earned it!! As part of your initial planning for the path to CVS®, you may want to plan a celebratory vacation or special dinner around this achievement. This will be the “carrot” to keep you on pace and pushing forward when the task may seem insurmountable.

My husband, Mark, knew that I would be taking the exam and had bought a small piece of art (**Figure 4**) I admired for our home. He planned to surprise me with it when I had been approved as CVS®. It was painful for him to have to hold on to this surprise for me when I didn’t pass the exam. He did hold on to it until I had passed the exam and was approved as CVS®. It was something he had in mind for me and had great faith in me even when I didn’t.



Figure 4

STEP 12: GROW COMMUNITY

Your destination has been reached....now what? Hopefully you will understand that achieving Certified Value Specialist® is only a beginning not a destination. Opportunities to stay current with industry trends, mentor others within the VM community, and actively participate in SAVE International® should be explored to expand and further develop your craft. You now have an in-demand skillset that few have been certified to apply professionally.

CONCLUSION

What might best summarize my path to CVS® can be found in an email (paraphrased) that I sent the Certification Board's CVS® Certification Committee after learning I was approved as CVS®.

In the process of taking (and retaking) the CVS® exam, I have learned some valuable lessons:

- *Humility – don't attempt a FAST diagram form that you have limited (or no) experience applying (Customer vs. Technical);*
- *Keep It Simple – don't overcomplicate (and clutter) function and FAST;*
- *Understand the WHAT first, then HOW, test with WHY;*
- *Ask For Help – admit you don't know it and seek those who do know it and can teach it;*
- *Practice – can't say enough about this (it can't be simply theory but the performance of what works); and*
- *Don't Give Up – failure is an opportunity to learn valuable lessons about the Value Methodology and yourself).*

The critical change for me occurred in June at the SAVE Conference. I attended Laurie Dennis and Renee Hoekstra's Module II where Bob Rude explained Function Analysis and FAST. I had more than a few AH-HA moments. This and the encouragement I received from the SAVE community in June motivated me to swallow my pride and apply what I had learned in a meaningful way. I am especially thankful to my advisor, Renee, who was my biggest fan (second only to my husband) throughout the process.

I am grateful to the CVS® Certification Committee and will continue to develop and expand my understanding of the value methodology so that I have the opportunity to guide teams to build success.