| | Strategy phase | Procurement phase | ALLIANCE BEGINS Development phase | | Implementation phase |
|---|---|---|---|---|---|
| Key actors | The owner, users, and other key actors | The owner, tenderers, and other key actors | Alliance parties | | |
| **Project values & sustainability** | Checking which sustainability drivers and legislations apply to the specific construction project at hand<br>The new construction law, CSRD, EU taxonomy for low-cost financing, pressure from European Green Deal<br>Which life cycle characteristic will be chosen from the new construction law?<br>Deciding on sustainability targets based on legislation and wants (e.g. certification)<br>What sustainability dimensions (e.g. ESG) should the focus be on?<br>Are there different focus points of sustainability for the process and the outcome?<br>What certification is suitable for this project?<br>Are they a boundary condition or target? | Conveying sustainability demands or targets in the project brief | Defining and wording project values together with the alliance parties<br>Deriving some values from the targets?<br>Involving all alliance parties in the process<br>Establishing soft values, such as ground rules for cooperation or common working practices<br>Deciding on target level of sustainability certification<br>Setting sustainability (e.g. ESG) as a part of the incentive system<br>Building a common understanding of the project | Integrating sustainability issues into the planning and design processes<br>Solutions that will fulfill the certification criteria<br>Project values guide daily actions and decisions<br>Guiding the way of thinking toward "pursuing shared values" | Implementing and familiarizing project values to people involved in the project<br>Viewing, adapting, and developing project values throughout the project |
| **Targets** | Identifying the owner's business strategy and values that affect the project's target setting<br>Bigger targets on portfolio level?<br>Benchmarking<br>On own data from previous projects<br>On similar projects<br>Defining project targets<br>Targets for the process<br>Targets for the outcome<br>Defining the wants and needs with enough precision<br>Defining boundary conditions | Choosing alliance parties so that all targets and demands can be fulfilled<br>Describing the targets in enough detail in the project brief<br>The evaluation of tenders will emphasize how well the targets were addressed<br>A part of the project plan as part of the evaluation criteria (if needed)<br>Applying value management practices: value planning<br>Preliminary planning for KRAs and KPIs for the development phase<br>Possibly working on them together with the tenderers as part of procurement | Clarifying and developing the owner's targets and demands together with the alliance parties<br>From the owner's targets to alliance targets<br>Choosing and defining KRAs and KPIs<br>Defining KRAs and KPIs with enough precision<br>Reflecting project values and/or sustainability<br>How to measure them reliably?<br>Setting weightings for KRAs and KPIs<br>Setting KRAs and KPIs to guide the development phase | Involvement of users in the design process<br>Applying value management practices<br>Value engineering<br>Measuring and developing KPIs<br>Encouraging innovation to find value-creating solutions<br>For example, innovation workshops<br>Committing key subcontractors to the same targets contractually and operationally | Motivation and capability of the alliance partners affects value realisation<br>Implementing the value-adding solutions from the VM exercise<br>Corrective measures to achieve goals<br>Developing and improving KPIs throughout the project<br>For example, setting KPIs and their weightings for a year at a time to focus on specific aspects |
| **Key processes, tools & methods** | Risk and opportunities management<br>Risk analysis | Risks and opportunities in procurement<br>Value for Money reporting by the owner<br>Reflecting the procurement phase | Highlighting project values and targets, e.g. ESG<br>Target Value Delivery process<br>Defining TOC<br>Continuous improvement measures<br>Deciding on tools and methods to help targets be achieved (e.g. CBA, A3, dashboards)<br>Defining what the tools will be used for (e.g. in the design process), how, and who will use them<br>Tools or methods focusing specifically on sustainability, e.g. ESG?<br>For example, CBA can be used to find solutions that fulfill the sustainability targets, such as lowest carbon footprint or life cycle cost | Risk reservation in TOC<br>Finding the most cost-efficient solutions that fulfill targets<br>Gathering and processing data from parties for dashboards<br>Defining what kind of data is viewed (e.g. schedule, budget...)<br>Implementing and familiarizing tools and methods to people involved<br>Value for Money reporting | Minimizing risks and realising opportunities<br>Continuous improvement<br>Dashboards<br>Ensuring real-time data and its correctness for accuracy<br>Continuous improvements to the dashboards<br>Value for Money reporting |