Benefits Realisation Management – Toolkit for Project Managers

CiCS Programme & Project Unit

1. Introduction

This document has been developed by the Programme & Project Unit for use by CiCS Project Managers. The aim has been to provide Project Managers with a simple, straightforward guide with which to introduce Benefits Realisation Management (BRM) to their projects. It is hoped that this document will provide a valuable source of information that will be of use throughout all stages of a project.

The document aims to provide:

- An understanding of the basic principles of BRM and how it fits with the CiCS Project Management methodology
- . An overview of the main tools of BRM the Benefits Workshop and the Benefits Map
- An overview of the practicalities of applying BRM to projects

Further information regarding BRM or guidance on its application can be obtained by contacting the Programme and Project Unit.

2. What is BRM and why should we use it?

BRM is a tool to help us get the most from project deliverables. Used successfully, it will help to maximise the benefits that users obtain from systems/services. BRM helps to:

- Define and deliver project aims and expected project benefits
- Deliver services that users want and will use (user satisfaction)
- Keep the project team focussed on project aims and benefits
- · Start up a project
 - Information generated by the Benefits Workshop (project aims, benefits, enablers, changes, stakeholders, resources etc) feeds directly into the Project Definition document
 - The Benefits Workshop can be used as a team building exercise (Forming, Storming, Norming, Performing)
- Plan and prepare for project handover/rollout
 - Identify the scale of changes required to working practices & culture and the tasks and resources required to deliver these changes
 - Ensure resources are available for rollout/change management
 - Encourages the project team to keep an eye on project closure & handover from the start of the project
- Plan and gather measures (usually after the project itself has closed)
 - E.g. are services being used? If not, why? Are users satisfied? Is the full potential of a new system/service being realised?

3. Who undertakes BRM and when?

BRM involves the identification of project aims and benefits; it is therefore important to involve all relevant project stakeholders in this process to ensure that the views of all interested parties are taken into account. Stakeholder involvement from an early stage will help to gain 'buy-in' to the concept of BRM and also give stakeholders a sense of ownership of the process/deliverables.

Some stakeholder groups are particularly large (e.g. in the case of academic staff) and it may be impossible to involve them all in the process - in this case, it is feasible to select a representative sample.

It is worth noting that the role of the Project Manager is to plan for Benefits Realisation. Most project benefits will be realised after project handover/closure (and therefore after the Project Manager has moved onto the next project!). The process of planning for Benefits Realisation will help to identify:

- The scale of work required for organisational change management activities/realising project benefits
- The resources/skills set required to undertake this work

Planning for benefits realisation should take place throughout the project lifecycle - this will involve planning for rollout, the delivery of benefits and the tracking of measures.

22-Oct-08 1 of 6

4. Benefits Workshop

The purpose of the Benefits Workshop is to bring together project stakeholders (ideally at the very start of a project) to undertake a group exercise that will:

- Identify project aims, benefits, organisational changes and enablers (this information can then be added to the project definition document)
- Lead to the development of a Benefits Map

Step 1 - Aims

The Benefits Workshop should start with an exercise to identify the aims of the project i.e.:

What is the project trying to achieve? - Why are we doing the project?

E.g. To improve..., To reduce..., To increase..., To ... more effectively etc.

- The project should support University objectives

Aims set the boundary for the project scope and summarise the main purpose of the project.

The project aims form the starting point for Benefits Realisation Management – once we know the purpose of the project and what it is trying to deliver, we can then look at how these aims can be achieved by the delivery of appropriate benefits.

Step 2 - Benefits

The next exercise is to identify the benefits that must be delivered to achieve the aims identified in step 1 - e.g.: Improved..., Reduced..., Increased...

These will range from operational benefits (e.g. increased efficiency & effectiveness) through to more strategic benefits (e.g. raised profile of research staff).

Step 3 - Enablers

Once the project aims and benefits have been identified, the next exercise is to identify the project enablers. An enabler could be a tool (e.g. IT system), a policy (e.g. information management policy), a building (e.g. Information Commons), etc

Note: The enablers don't usually by themselves deliver benefits - benefits must be actively realised via organisational change.

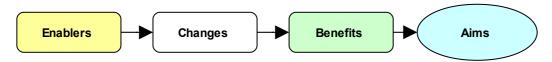
Step 4 - Changes

This exercise should identify the organisational changes that must occur in order for the benefits identified in step 2 to be realised - for example changes to working practice/culture and achieving user buy-in.

Once the above information has been gathered, a Benefits Map can be developed.

5. Benefits Map

The Benefits Map provides a visual overview of the information identified during the Benefits Workshop - i.e. the project aims, benefits, enablers and changes. The general form of the Benefits Map is as follows:



We may already have an idea of what the enablers could be, e.g. new software, but the main direction in the workshop is right to left – essentially, working backwards from the project aims, identifying the benefits that must be delivered to achieve these aims and then identifying the enablers required to deliver these benefits - the final step is to identify the changes that are required to make it all happen!

The reason for adding the changes as the final step is that we're more likely to have an appreciation of the changes involved after we've identified the enablers! – E.g. if we've identified a new student administration system as the enabler, we'll then appreciate the changes that must take place (training/education and changes to working practices and culture) in order to achieve user buy-in.

6. The application of BRM

Examples of Benefits Maps used in actual CiCS projects are given in the last three pages of this document. The maps were created within Microsoft Word using text boxes, the basic shapes of an oval and a rounded rectangle,

22-Oct-08 2 of 6

along with connectors to join everything together. Microsoft Visio may also be used to create the maps. The use of labels (e.g. E_01) helps when referring to specific parts of the map. Hopefully, these examples will provide inspiration for Project Managers who are introducing BRM to their own projects.

- **Alumni CDM** (page 4) This map was produced specifically as a negotiating tool to illustrate how the sharing of Alumni data via the CDM could lead to the achievement of the aims of both the Development and Alumni Relations Office (DARO) and of academic departments i.e.:
 - To fundraise more effectively (DARO)
 - To utilise alumni resources more effectively (academic departments)
 - To improve the University's relationship with Alumni (both parties)
- **Document Management System** (page 5) This map was created for the Student Services pilot of the Document Management System project. The map illustrates how system functionality along with organisational change can achieve the aim of improved customer service and satisfaction.
- CRM system (page 6) This map was produced for the CRM project (the in-house development of a CIS
 enquiry-handling solution). The map illustrates the requirement to develop and implement appropriate
 policies and procedures and the organisational changes required to standardise working practices and to
 gain user buy-in.

7. Measuring the benefits

We need to know if we're getting the benefits. Measurement of benefits usually happens after project closure but needs to be planned in advance (may be appropriate to take the 'before' measures during the project):

- Is the system/service being used? generate and analyse usage stats
- Are users satisfied? undertake a user survey
- Are specific benefits being realised? measure/track benefits against desired values
 - → Gather info at departmental level can then identify areas of concern and target support where required
 - → Benchmark before, during and after rollout to assess impact/value of the new service

8. Main overview

- 1. Deliver the capability (the new service)
- 2. Empower the users (train them how to use it)
- 3. Gain user buy-in (get them to actually use it)
 - → Deliver the benefits

A lack of user buy-in is a risk to benefits delivery – effective organisational change management is required to establish new ways of working and to overcome cultural barriers.

9. What next?

Further information regarding BRM or guidance on its application can be obtained by contacting the Programme and Project Unit.

email: CiCS Programme and Project Unit

22-Oct-08 3 of 6

Benefits Map - Alumni CDM

E 01: Raiser's Edge Database E 02: Alumni B 02: A 01: To utilise the CDM Departments no University's alumni B 03: More data longer maintain resources more fed back to local data sources effectively DARO from B 04: The central departments for E 03: Sheffield data source holds recording within Web Reports the definitive Raiser's Edge alumni record C 01: Buy-in to A 02: To improve the the central data University's relationship E 04: Alumni with Alumni source Reports Catalogue B 07: Increased staff effectiveness/ B 06: DARO productivity B 01: staff have more A 03: To fundraise more Departments have time for alumni B 05: Less time effectively on demand access relationship spent by DARO to a corporate management staff in supplying repository of standard data to alumni data departments E 05: Policy for the practical use of alumni data within the institution

Enablers

Changes

Benefits

Aims

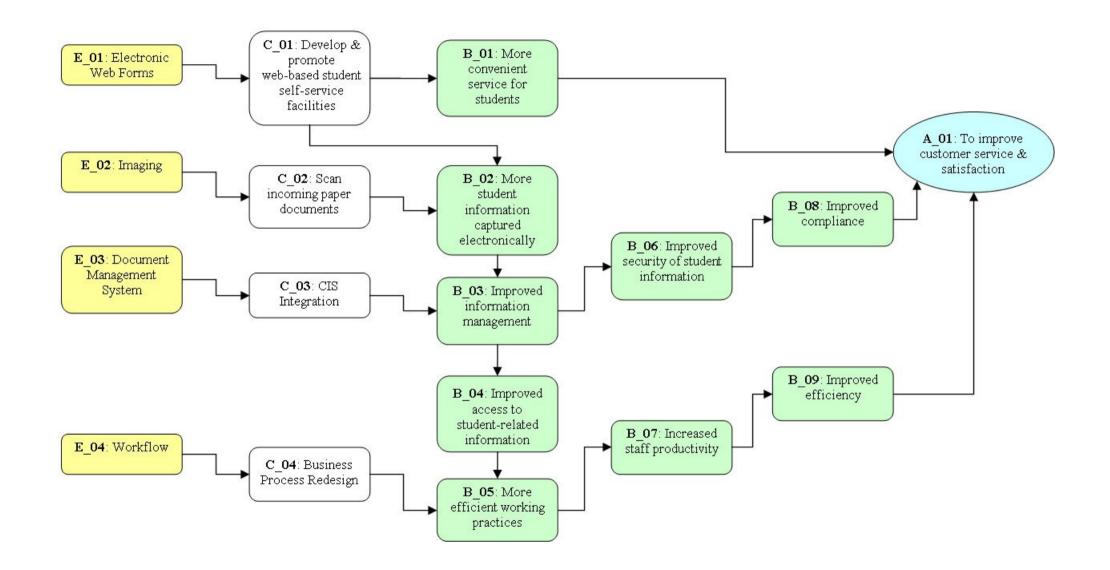
22-Oct-08 4 of 6

Enablers

Changes

Benefits

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