**Project Benefits Management Plan**

[Replace the logo with your company logo. Remember to update the document footer as well.]

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| --- | --- |
| **Project Title/Code:** |  |
| **Date:** |  |
| **Document Version:** |  |

# Introduction

This document sets out how the benefits management process will be followed on this project. It shows what the benefits are for completing the work, and how they will be measured.

**Benefits Management Process**

The benefits management process is as follows:

1. Review the benefits in the business case

2. Ensure each benefit has an owner who will be responsible for delivering the benefit

3. Create benefits realisation plan: a set of activities that will lead to the delivery of the benefit for each benefit identified. The benefits realisation plan forms the majority of this document

4. Measure the current position

5. Deliver the benefits realisation plan

6. Measure the new position and track what benefits have been achieved.

Where benefits are subjective and cannot be easily measured, we will take a subjective assessment of what has been achieved instead of quantifiable/objective measuring.

**Benefits Realisation Plan**

[Use this section to record benefits management activities for each benefit on your project. Get the list of benefits from the business case. Add as many pages and as much detail as relevant to your project. The first one is completed as an example for you.]

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| **Benefit:** | *Phrase the benefit with “Improved…/Reduced…/Increased…/Decreased… etc*  Improved productivity |
| **Owner:** | Sales Manager |
| **Detailed description:** | |
| Currently, the Sales team spends a lot of time each day hunting for past proposals, customer relationship information, policies and other documentation in the shared network drive. There is no naming convention for filing documents and it is generally considered to be difficult to source the information required. The benefit expected is that productivity in the Sales department will improve as a result of not having to look for documentation. | |
| **Measures**  *Describe how you will measure benefits before and after the changes. Record what will be measured, how activities will be measured, what effort is required, who will do the measuring, who will approve the results, how long you will measure for, what tools are required to measure etc.* | |
| **Baseline measures:** | How long it takes the Sales team to look for documentation at present.  To be gathered using a survey asking for their impressions of time taken. This is a subjective measure. We will not be doing objective testing of time taken.  Survey will be conducted 3 months prior to go live using SurveyMonkey, and signed off by the Sales Manager. |
| **Post-live measures:** | Eight weeks after the new document management system is live, we will repeat the survey with the same questions in the same format, and compare the results. We are expecting to save at least 30 minutes per day per team.  We will repeat the survey six months after go live, to see if productivity has improved further once people become more used to the system. Results will be signed off by the Sales Manager.  This benefit also links to the benefit relating to staff satisfaction, as the expectation is people will be less frustrated as they won’t be wasting so much time. |
| **Enablers required:** | |
| *Enablers are the items required for the changes to be implemented e.g. tools, processes, policies, physical assets like a building*   * Document management system implemented * Document workflow implemented * Integration with Outlook implemented * Integration with Active Directory for single sign on implemented | |
| **Changes required:** | |
| *Changes are the organisational change required to achieve the benefits, normally using the enablers above. In other words, delivering a document management system won’t have any impact on team productivity unless the team are trained in how to use it, and want to use it.*   * Business process redesign completed and embedded * Training for users * User buy in for the new tool | |

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| --- | --- |
| **Benefit:** |  |
| **Owner:** |  |
| **Detailed description:** | |
|  | |
| **Measures** | |
| **Baseline measures:** |  |
| **Post-live measures:** |  |
| **Enablers required:** | |
|  | |
| **Changes required:** | |
|  | |

**Benefits Approval Process**

This is the process we will use to gain sign off for benefits at the point they have been delivered:

[Add in whatever process you use like the benefit owner will review benefits delivered after 6 months and then benefits tracking will cease.]

**Constraints and Assumptions**

[Add details in here of any constraints or assumptions relating to how benefits management will be handled on the project or who will do it.]

* Ex: The assumption is made that PMO support will be available to track benefits on this project.
* Ex: The project is required to use the PMO process for benefits management.
* Ex: Benefits owners will be accountable to their own line management for benefits delivery. While the project is the enabler for delivery of the benefits, the project manager is not responsible for benefits tracking or reporting.

**Other Notes**

[Use this space to record any other information relevant to your project’s approach to benefits management, or delete it if you don’t need it.]