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| --- | --- | --- | --- |
| A picture containing wheel  Description automatically generated | Benefits management plan | Sponsor: | [Name, Job title] |
| [Project/Programme name, *eg, Document Management System Implementation*] | Benefit owner:**:** | [Name, Job title] |

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| Project/Programme objectives |
| [What will the project/programme achieve? What are the key deliverables? *Eg, The project will implement a new document management system to achieve greater efficiency, higher information security and accuracy. This aligns with the strategic objective: increased business agility.]* |
| Who will benefit and how? |
| [Who will primarily benefit from the initiative, and in what way? *Eg, Staff will save time finding relevant and up to date information. Information will also be more secure.]* |
| What are the benefits? How will they be measured and tracked? |
| [List benefits, KPIs and measures together with their baselines and targets. Use a table or map to capture the information. Ideally you should have no more than 3-5 benefits and 1-2 KPIs and Measures per benefit. *Eg:*]  Improved business agility  Faster access  % time  Improved accuracy  Improved security  Error rate  # of incidents  30% – July ‘20  10% – July ‘22  50% – July ‘20  30% – July ‘22  50 – July ‘20  10 – July ‘22  **Objective**  **Benefit**  **KPI**  **Measure**  **Baseline**  **Target**  Reduced effort  Reduced number of errors  Lower number of security incidents  **Target** |
| When will the benefits be realised? |
| [Provide a benefits schedule or timeline. When will they be enabled? When will they be realised? For how long will they be tracked? *Eg:*]   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Benefit** | **Dec 2020** | **June 2021** | **Dec 2021** | **June 2022** | **June 2023** | | **Benefit 1** | 10% | 20% | 50% | 80% | 90% | | **Benefit 2** | 15% | 30% | 50% | 75% | 85% | | **Benefit 3** | 0% | 0% | 25% | 50% | 75% | |
| Roles and responsibilities |
| [Provide a RASCI matrix for the different roles and responsibilities associated with good benefits management – this should be aligned with the project or programme methodology. *Eg:*]   |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | |  | **Sponsor** | **Benefit Owner** | **Project Manager** | **Benefits Manager** | **Measurement Owner** | **Change Manager** | | **Identify** | C | A | R | C | C | C | | **Agree** | R | A | R | C | C | C | | **Plan** | C | A | R | C | C | C | | **Measure** | C | A | R | C | R | C | | **Report** | I | A | R | C | C | C | | **Review** | I | A | R | R | C | C | |
| Benefits assumptions |
| [What are some of the assumptions on which the benefits estimations are based? *Eg, Use of the new document management system will be mandated.]* |
| Constraints and dependencies |
| [What are some of the environmental constraints that need to be factored in to achieve the benefits, or what other pieces of work might it be dependent on? *Eg, Travelling or offsite staff will be unable to access the document management system]* |
| Disbenefits |
| [Are there any potential disbenefits of the programme that might counter the benefits? How will their impact be minimised? *Eg, Cost and inconvenience of maintaining two systems in parallel]* |
| Benefits risks |
| [What are some scenarios which could prevent the benefits from being realised and what are some of the mitigations that can be put in place to avoid or manage these? *Eg, If staff do not adopt and use the content management system appropriately, then information accuracy and quality may be compromised.]* |
| Change management and handover |
| [How will change be managed so that benefits realisation happens? Who will the benefits be handed over to? *Eg, The system will be rolled out in a phase manner with adoption being measured at the end of pilot. The system will be handed over to the Manager – Information Services at the end of the project]* |