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The Missing Link, Benefits Realization Management
Welcome to this Edition
David Pells, Managing Editor

The Missing Link, Benefits Realization Management – and Welcome to the August 2017 PMWJ

David Pells, Managing Editor

Welcome to the August 2017 edition of the **PM World Journal** (PMWJ), the 61st uninterrupted monthly edition. This edition continues to reflect the international nature of this publication; **27** original articles, papers and other works by **33** different authors in **14** different countries. News articles about projects and project management around the world are also included. Since the primary mission of this journal is to support the global sharing of knowledge, please share this month's edition with others in your network, wherever in the world they may be.

Since last August, on the recommendation of several international advisors, I have used this opportunity to mention important trends or issues that I see as journal editor. This month, I want to discuss benefits realization management, a topic that most of you may not be knowledgeable enough about. That was true for me before I launched some serious research on the topic about two months ago. As a 35 year practitioner of professional project management, with many years of experience as a professional leader, I thought I knew all I needed to know about program and project management. I've had to rethink that assessment.

The missing link between the strategy and results

In recent years, a number of significant papers have been written about the importance of both the front end and the back end of the project life cycle. In particular, current project management bodies of knowledge and standards have been criticized for lack of enough attention to the pre-investment stage of projects and the post-delivery and operational stages after projects are 'completed'. Some excellent papers on these topics that I am familiar with include recent works by Alan Stretton and Russ Archibald:

- The Six-Phase Comprehensive Project Life Cycle Model Including the Project Incubation/Feasibility Phase and the Post-Project Evaluation Phase, by Russell D. Archibald, Ivano Di Filippo and Daniele Di Filippo; December 2012 [1]
- Involving program/project managers in organizational strategic planning?, Stretton, July 2011 [2]
- A further note on involving program/ project managers in organisational strategic planning, Stretton, October 2013 [3]
- Project Outputs and Customers Outcomes, Stretton, February 2016 [4]
- Organizational strategic plans, projects, and strategic outcomes, Stretton, April 2016 [5]
- Adding value to project clients, Stretton, December 2016 [6]

In my opinion, benefits realization management (BRM) can successfully link program and project outcomes (and stakeholder benefits) to organizational strategies; BRM might be the missing link in managing the program and project lifecycle. Perhaps this is misunderstood because of the generic nature of the word "benefit"; more likely it is due to its incorporation only into program management standards and guides, not in those addressing project management. Perhaps it is also due to the widely accepted notion that strategies and strategic planning are the responsibility of senior executives, not project managers.

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This understanding misses the critical link: strategies should flow from desired outcomes and benefits, programs and projects then flow from strategies to achieve those benefits. Programs and projects must deliver the desired benefits in order to be successful. Traditional project performance measures no longer suffice. We've heard many times that successful outcomes depend on doing the 'right projects right', but doing the right projects depends on having the right strategies, and that in turn requires strategies aimed at achieving "benefits". Successful programs and projects are those that deliver full benefits (creating the desired 'value"); delivering projects on budget and schedule matters little if benefits are not delivered.

Program and project managers need to not only fully understand organizational strategies, they need to understand and embrace the desired outcomes and benefits to be achieved. Identifying, defining, tracking, implementing and measuring benefits provide the long missing link between organizational strategies, programs, projects, outcomes and value. Unfortunately, this is not all so easy as it seems.

The light bulb: Benefits in program(me) management

In April, I delivered a briefing on PMI's Standard for Program Management to executives of a major U.S. government program office in Washington, DC. That standard is organized around five core "domains": strategy alignment, benefits management, stakeholder management, governance and life cycle management. The leaders in the room were all well versed in traditional project management concepts and easily grasped the points about strategy, stakeholders, governance and life cycle. They were however interested in learning more about program benefits management and requested another in-depth briefing on this topic. Over the last the last few months, I have researched program benefits management, not only in the USA but in several other countries. The results have changed my perspective on not only program management but also on project and portfolio management.

I imagine you all have heard the expression "a light bulb came on" to represent sudden enlightenment or understanding. That happened for me about a month ago, when the linkage of benefits to project success or failure came into focus. It also became clear that a deeper understanding of BRM leads back to some fundamentals – you cannot realize benefits without adequate management of projects or without accurate performance measures. That is why, when you study benefits management you learn that not only must benefits be linked to strategies, but effective key performance indicators (KPIs) are needed. And in order for linkages to be made and performance indicators to be useful, some kind of benefits mapping is needed. But I'm getting ahead of myself. Here are some very useful references that provided extremely informative information on program benefits:

- Standard for Program Management, Project Management Institute (PMI), 2013 [7]
- 3 Pulse of the Profession reports on benefits realization, PMI, 2016 [8]
- 5 Thought Leadership series of articles on benefits realization, PMI, 2016 [9]
- Managing Successful Programmes, OGC, UK government, 1999-2007 [10]
- Guidelines on Programme Management, UK government, 2010-present (11]
- Code of Practice for Programme Management in the Built Environment, Chartered Institute of Building, UK, 2016 [12]
- APM Body of Knowledge, Association for Project Management, UK [13]
- APM Benefits Realisation Management references [14]
- PMI articles on benefits realization [15]
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- Hudson, Andrew; Managing Program Benefits, *PM World Journal*, Feb 2017 [17]
- Dalcher, Darren; So where do benefits come from? *PM World Journal*, Feb 2017 [18]
- Morris, Peter; Reconstructing Project Management; Wiley-Blackwell, 2013, [19]

The light bulb came on for me after reading these and other references (see below), so it took some study. I'm not going to explain benefits realization management here, these many other authors have done it already and better than I could do. I'm just saying… this topic is important!

Context and status: Industry and international differences

All the general stuff in the standards and guides was educational and useful, but I also wanted to understand how benefits management could be applied to the kinds of programs and projects that the government leaders in Washington, DC were managing. I was looking for examples of benefits associated with engineering, construction, infrastructure, safety programs, complex systems, etc. I needed more context; it was not easy to find.

For example, the PMI references seemed to be aimed at IT, software and technology organizations, and commercial programs. Government guides were too general as they also needed to cover a wide range of programs and projects. I found the CIOB guide for programme management in the built environment [12] but little else. I need to do more research on this, but I could not find much useful information through Google searching.

Geographically, it was a different story.   The UK is by far the leading source of program/project benefits management, per se, although one can argue that benefits realization has emerged from the broader value management discipline. (For good discussion of this topic, see Morris 2013 [19] Research on benefits realization began to appear in the 1980s and 1990s; primarily in information technology industries.   The widespread attention on IT project failures led to the issuance in 1999 of the Managing Successful Programmes (MSP) guide/standard by the UK's Office of Government Commerce (0GC). [10] MSP included for the first time (I believe) major discussion of programme benefits, and required benefits to be identified and managed for all major UK government funded IT programs. MSP was updated several times through 2007; it was replaced by Guidelines for Managing Programmes in 2010, now required for all major UK government funded programmes and requiring the same benefits realization management discipline as MSP. [11]

The Association for Project Management (APM), the UK's chartered body for project management, has incorporated benefits realization into its "body of knowledge" [20], has established a Benefits specific interest group (SIG), and has published articles, papers and reports on the topic. [14] The biggest surprise for me was the discovery of a very robust set of benefits realization guidance, information and templates published by the Government of Northern Ireland. [20] The CIOB's Code of Practice for Programme Management in the Built Environment contains extensive coverage for UK architects, engineers, construction companies and others involved with buildings projects and programmes. [12]

Australia and New Zealand have followed the lead of the UK; the following guides and requirements for benefits realisation were found:

- Benefits Management Guidelines, Australian Transportation Assessment and Planning (ATAP), Commonwealth Department of Infrastructure and Regional Development [21]
- Benefits Realisation Management Framework, New South Wales Government, [22]

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- Benefits Management Framework, Building Queensland, Government of Queensland, Australia [23]
- Outcomes Management Toolkit and Templates, Tasmanian Government [24]
- Benefits Guideance, The Treasury, New Zealand Government, 2017 [25]
- Managing Benefits from Projects and Programs: Guide for Practitioners, The Treasury, New Zealand Government, 2016 [26]
- Guide to Benefits Realisation Management, New Zealand Government, 2015 [27]
- Better Business Cases: Managing Benefits from Projects and Programmes; Treasury's Infrastructure Unit, New Zealand Government, 2014 [28]

It is apparent that benefits realization management has been fully embraced by the Australian, New Zealand and UK government, with industry following suit. Shockingly, I only found two references to BRM in Canada, both government IT organizations. In the USA, there are PMI's program management standard, PMI's Pulse of the Profession reports and Thought Leadership papers in 2016, and some papers published at PMI conferences, mostly authored by researchers in other countries. In U.S. government agencies, almost nothing! BRM is apparently not yet being implemented by the American federal government. (If you know of some examples, please let me know.)

Not so fast – implementation challenges

So why is BRM not implemented in the United States? Why is BRM not yet catching on in many organizations and industries around the world, even where it has been embraced by government agencies overseeing major projects and programmes? In my opinion, BRM is simply not so easy to implement. According to Gerald Bradley, a BRM and MSP expert in the UK, here are some critical success factors for implementing BRM:

- Being clear about the business end goal;
- Keeping this end goal to mind throughout the change life-cycle;
- Engagement and involvement of stakeholders throughout;
- Quality mapping of objectives to determine the bounding objective;
- For each bounding objective, the creation of high quality robust Benefit Maps;
- Rigorous determination of enabler features and business changes using the Benefits Maps;
- Early identification of measures for most if not all the benefits;
- Early establishment of a benefits tracking and reporting system; and
- Effective transition into "business as usual". [29, 30]

In addition, the organizational culture may often need to change. For example, program and project managers must overcome the tendency to measure success according to traditional project performance measures (cost, schedule, quality, requirements, etc.). Perhaps one of the reasons that Agile methodologies have proven so successful is that they focus on delivering intermediate benefits more quickly to customers/stakeholders.

In addition, effective program management including BRM requires adequate project performance metrics, which in turn require adequate project management. Effective BRM goes hand in hand with effective program and project management. In any case, the above points all clearly indicate that implementing BRM can involve serious organizational changes.

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But, what if…?

I am convinced that BRM can add tremendous value to program and project management. Nevertheless, I think there is a caveat. If benefits are critical to successful program or project management, and those benefits are related to organizational success, competitive advantage or new, innovative products, services, systems or capabilities, it may be necessary to keep those end benefits secret. That may well be the case for programs and projects in the defense, military, national security, cybersecurity, nuclear energy and other sectors associated with sensitive topics or technologies. In those cases, benefits still need to be defined, monitored and harvested; they just might need to be kept confidential.

In addition, BRM should be implemented alongside effective risk management. A side effect of BRM includes possible "dis-benefits", potentially negative impacts on one or more stakeholders. Risks and opportunities associated with desired benefits and potential dis-benefits must be monitored and managed. For example, what is the impact on benefits if a project is delayed, significantly over-budget/, or crashes and burns?

Why? Implications for project and portfolio management

What is the purpose of your program or project? Why is a project being launched or performed? What is the purpose of all of the projects and programs in a portfolio? Benefits get to the heart of these questions? According to Morris 2013, "benefits management applies to project management as well as to program management… projects create benefits." [19] I couldn't agree more. Project management guides and standards worldwide currently exclude benefits management, although BRM is being addressed for projects among project management researchers now. It's just a matter of time until BRM is incorporated into both project and portfolio management.

So that's what I've been up to lately.

Now - This month in the Journal

Now for this month's journal which again contains some interesting and outstanding works. Five featured papers are included this month, including two very good ones from Nigerian authors. The paper from Stephen Paterson, a Scottish expat living in Thailand and working oil and gas projects in southeast Asia, shows just how international the PM profession is these days. Alan Stretton in Sydney is back with another interesting paper, sharing his perspective (and vast experience) on "some commonalities and differences between managing projects in a production-based or project-based organization." And Walt Lipke in the USA is back with another paper on earned schedule, a topic he invented. These papers are all serious contributions to the global body of project management literature.

Four series articles are again included. Darren Dalcher in UK has facilitated another interesting '*Advances in Project Management*' article, this month by Routledge author Martin Samphire. Darren's fascinating introductory article is titled "Is it time for good enough governance." Martin's article then revisits the important topic of "Project Governance." Neil Robinson is back with his second instalment in the new "Project is Life" series, this month with an article titled "I want to… Life goals: a project-based approach." And we are happy to introduce a new series this month, "Project Business Management" by Oliver Lehmann in Germany. His first article discusses "Project Supply Networks (PSNs)", an important but often overlooked aspect of managing projects up and down the supply chain. Oliver is author of the book "*Situational Project Management: The Dynamics of Success and Failure*", published by Auerbach/Taylor and Francis in 2016.

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Engineer Abeer Al Nuaimi in Abu Dhabi, UAE has authored an Advisory article this month titled "Applying seven good habits to develop strategic stakeholder relationships." Isaac Nyarbaya, returning correspondent from Rwanda who is currently working in Kenya, has authored the Commentary article "International Project Management: Could it be another project management specialization that needs consideration?" David Tain in Alberta, Canada has returned to the journal with "Are you Making the Right Decision Right? Cognitive Limitations and Biases in Decision-Making." And Darren Dalcher in UK has contributed a second article this month in the Commentaries category, titled "The case for further advances in project management." Don't miss these short but interesting articles.

Four Second Edition papers include two each originally presented at project management conferences earlier this year in Riga, Latvia (April) and College Park, Maryland, USA (May). The University of Latvia papers include "Communication Management Tools for Managing Projects in an Intercultural Environment" by Olga Mikhieieva from Ukraine currently studying at Dortmund University of Applied Sciences and Arts in Germany, and Matthias Waidmann in Dortmund; and also "Cooperation and Competition in Project Teams" by Joanna Cewinska and Anna Krasnova at the University of Lodz in Poland. The University of Maryland conference papers include "Lean or Agile: Lessons Learned from a Tech Startup" by John Johnson in Virginia, USA; and "Application of an interrelated UAS-BIM system for construction progress monitoring, inspection and project management" by Shahab Moeini, Prof Azzeddine Oudhehane, Tareq Baker and Wade Hawkins at the Southern Alberta Institute of Technology in Calgary, Canada.

Interesting regional reports are again included this month from Alfonso Bucero in Spain, Jouko Vaskimo in Finland, Miles Shepherd in the UK and Cecilia Boggi in Argentina. Five interesting book reviews are also included. All of the articles, papers, reports and reviews this month contribute to the global project management body of knowledge. Please read those of interest to you, then share them with others. Sharing knowledge multiplies the impact of good ideas, and some ideas (like projects) can change the world.

The rest of this article is our monthly boilerplate. Please read if this is your first time with the PMWJ or read again if you are a subscriber; it's important for sustaining this publication.

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If you are teaching project management at a college or university, or an active academic leader or researcher in the P/PM field, our "Offer for Students of Project Management" provides three areas of potential interest to students – publishing opportunities, free library memberships and a virtual research internship. We will soon introduce a Research Scholar opportunity. For information about these programs, please contact info@pmworldlibrary.net.

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Thanks to Authors and Sponsors

I want to thank the authors who contributed to this edition of the PMWJ. Most have included an email address at the end of her or his author profile. If you find an article or paper useful or interesting, let the author know. Better yet, ask questions, start a discussion, share information and knowledge. We also want to thank our advisors, correspondents and contributing editors around the world. These teams include leaders from academic and professional organizations in around 50 countries.

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Share it forward

If you found something interesting in the PMWJ this month, please **SHARE IT FORWARD** - send the link to colleagues, co-workers or friends. If you have knowledge or a story to share, submit an article or paper for publication. We are especially interested in those that contribute to solving global problems. Thank you for reading this month's edition of the PMWJ, have a great January and good luck with your projects!

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David L. Pells is Managing Editor of the **PM World Journal** (www.pmworldjournal.net) and Managing Director of the PM World Library (www.pmworldlibrary.net). David is an internationally recognized leader in the field of professional project management with more than 35 years of experience on a variety of programs and projects, including engineering, construction, energy, defense, transit, technology and nuclear security, and project sizes ranging from thousands to billions of dollars. He has been an active professional leader in the United States since the 1980s, serving on the board of directors of the Project Management Institute (PMI®) twice. He was founder and chair of the Global Project Management Forum (1995-2000), an annual meeting of leaders of PM associations from around the world.

David was awarded PMI's Person of the Year award in 1998 and Fellow Award, PMI's highest honor, in 1999. He is also an Honorary Fellow of the Association for Project Management (APM) in the UK; Project Management Associates (PMA - India); and Russian Project Management Association. Since 2010 he is an honorary member of the Project Management Association of Nepal. From June 2006 until March 2012, he was the managing editor of *PM World Today*. He occasionally provides high level advisory services for major programs, global organizations and the U.S. federal government. David has a BA in Business Administration from the University of Washington and a Master's degree in business from Idaho State University in the USA. He has published widely and spoken at conferences and events worldwide.

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