

## **Program Benefits Management: an International Best Practice the U.S. Government Could Use<sup>1, 2</sup>**

By Wayne Abba, David Pells, Miles Shepherd

### **ABSTRACT**

Benefits Realization Management (BRM) has been incorporated into several international standards for program management, including The Standard for Program Management from the Project Management Institute (PMI) in the United States and Managing Successful Programmes (MSP) from the UK government (first published in 1999). MSP in the UK has been updated and replaced by Guidelines on Programme Management (2010) and Guide for Effective Benefits Management in Major Projects (Oct 2017). Policies and Guides related to BRM have also been issued by national and regional governments in Australia and New Zealand, as leaders have recognized the value of measuring program and project outcomes and benefits in addition to traditional measures such as scope, schedule and cost.

Professional bodies in the UK and Australia have focused attention on BRM in articles, blogs, conferences, papers and standards. While PMI devoted its entire suite of “Pulse of the Profession” and “Thought Leadership” papers to benefits realization in 2016, and has published some conference papers on the topic, there is little evidence of BRM being implemented in the United States. Among US federal agencies, almost nothing! Why is this? What is the purpose of a program or project? Why is a project launched, funded or performed? What is the purpose of all of the projects and programs in a portfolio? What benefits will be gained and for whom? What value will be created? BRM gets to the heart of these questions.

This paper briefly explains BRM concepts and implementation issues, drawing on experience, guidance and documents in the UK and other countries. Its applicability for use in US government agencies is then explored. Effective BRM does not replace traditional project management processes and tools, but rather provides a basis for linking strategies, projects, programs, performance and outcomes. If anything, it can make earned value management and other proven project management methodologies more effective, while also promoting agility and stakeholder value.

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<sup>1</sup> Second Editions are previously published papers that have continued relevance in today’s project management world, or which were originally published in conference proceedings or in a language other than English. Original publication acknowledged; authors retain copyright. This paper was originally presented at the [5th Annual University of Maryland PM Symposium in May 2018](#). It is republished here with permission of the authors and conference organizers.

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## A VERY SHORT INTRODUCTION TO BRM

According to PMI, program management includes the following five core domains: strategy alignment, benefits management, stakeholder management, governance and life cycle management. Program benefits management is the program management domain that defines, creates, maximizes and delivers the benefits provided by the program. The Purpose of Program Benefits Management is to focus program stakeholders (program sponsors, program manager, project managers, program steering committee and others) on the outcomes and benefits to be provided by the various activities conducted during the program. (PMI 2017)

*The sixth edition of the APM Body of Knowledge lists benefits management as one of the core areas addressed under the heading of scope management, thus reflecting the assertion that the planned objectives of projects can 'be defined in terms of outputs, outcomes and benefits.'* The APM Body of Knowledge asserts that delivering benefits is the primary reason for organisations to undertake change. (Dalcher 2017)

*There is no other purpose in doing a programme than to deliver value and benefits. This is the true measure of a programme's success... research shows that for programmes to be more successful, they need to have a clear purpose, be strategically aligned with a recognized need and (have) a strong financial case. Programme<sup>3</sup> benefits management is the practice that brings this together.* (Hudson 2017)

### Some Definitions

**Benefit** – Gains and assets realized by the organization and stakeholders as the result of outcomes delivered by the program. (PMI 2017). The measurable improvement resulting from an outcome perceived as an advantage by one or more stakeholders; ex. Improved services (OGC 2007)

**Benefit Management** – The identification, definition, tracking, realisation and optimisation of benefits within and beyond a programme. (OGC 2007)

**Benefits Realisation** – A process to make benefits happen and also to make people fully aware of them throughout the entire process. (Serra 2016)

**Outcome** – The result of change, normally affecting real-world behaviour and/or circumstances; the manifestation of part or all of the new state conceived in a programme's blueprint. (OGC 2007)

### Basic BRM Concepts

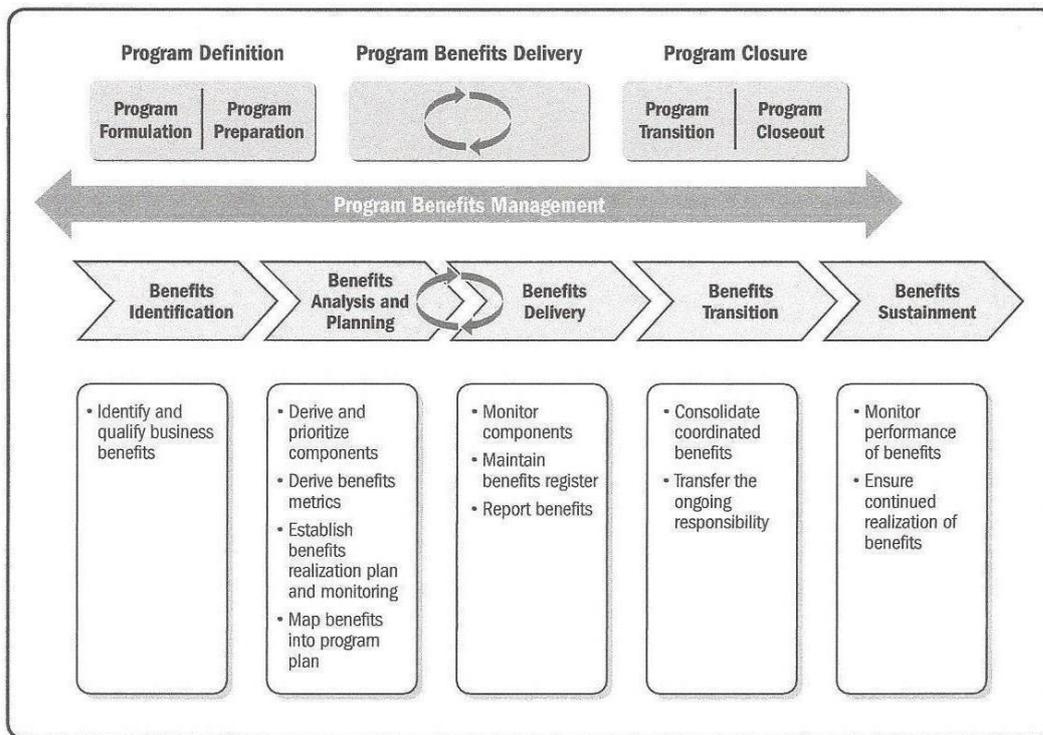
According to PMI, a benefit is an outcome of actions and behaviors that provide utility, value or positive change. Some benefits are relatively certain and easily quantifiable (for example, creation of physical products or services, achievement of financial goals, etc.). Other benefits may be less quantifiable, for example, improved employee morale, enhanced reputation, customer satisfaction, etc.) Benefits may not be realized until completion of a program, or may

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<sup>3</sup> Both spellings, program and programme, are used in this paper to accurately reflect the references from other countries.

be realized in an iterative fashion as projects with the program produce incremental results. (PMI 2017)

Most books and papers dealing with BRM, for example Serra (2016), describe five phases or sets of activities involved in benefits management: benefits identification, benefits analysis and planning, benefits delivery, benefits transition and benefits sustainment. Figure 1 shows these steps aligned with the program lifecycle in the PMI standard.



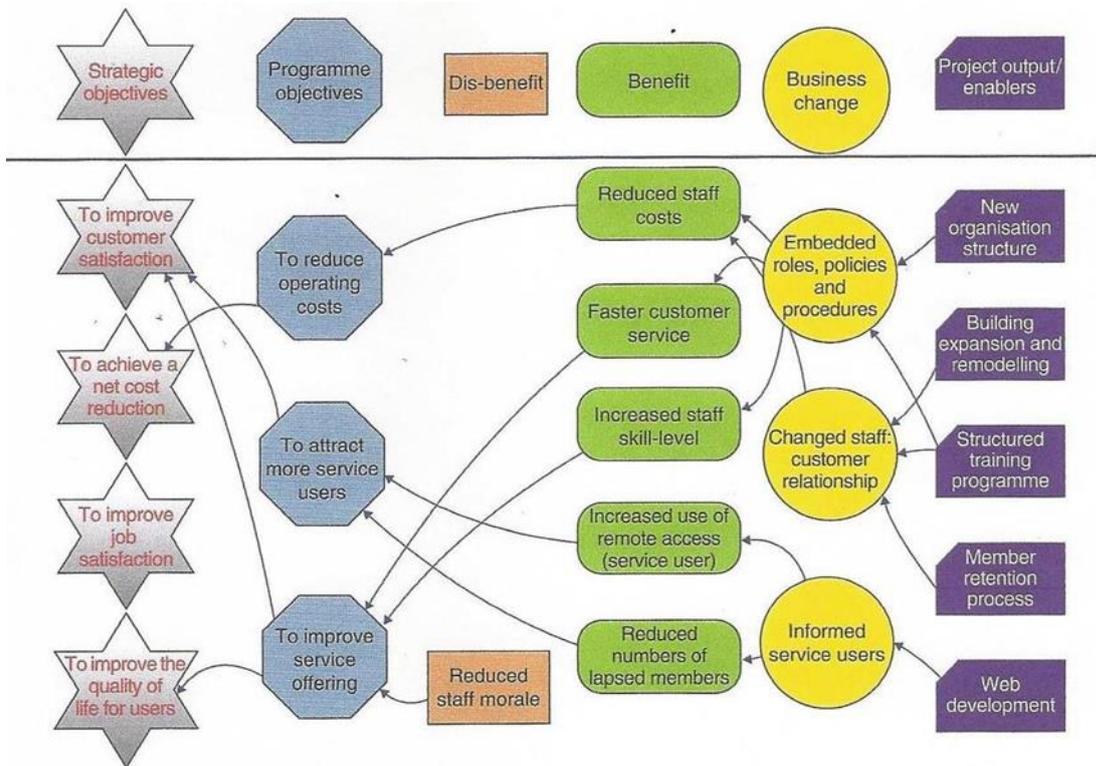
**Figure 1: Program Lifecycle and Benefits Management**  
 Adapted from the PMI Standard for Program Management (PMI 2017)

BRM links program and project outcomes to organizational strategies. Per the PMI standard and most books on the topic, benefits also link strategies directly to stakeholders. Historically, this linkage has been missing from the strategic planning process. Strategies in fact 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. (Pells 2017).

Piney says it more succinctly. *Benefits should drive programs, not vice versa, since programs are run in order to deliver benefits.* (Piney 2018, p. 33) Piney describes a modified, perhaps more mature model, including the following: Benefits Assessment, Business Case Development, Benefits Realization Planning, Benefits Realization, and Benefits Realization Completion. (Piney 2018, p. 35).

The primary point of these models is that BRM requires actions to identify and deliver benefits. Desired benefits must be defined and aligned to strategic objectives, which can then be the basis

for sub-programs, projects and activities initiated to achieve those strategies and benefits. An important tool in the process is the Benefits Map, a simple example of which can be seen in Figure 2. For a more advanced model and approach to benefits mapping, see Piney (2018).



**Figure 2: Example of Benefits Map**

*Adapted from the CIOB Code of Practice for Programme Management in the Built Environment (CIOB 2016)*

According to Hudson, benefits need to be SMART – specific, measurable, agreed upon, realistic and time-bound. Benefit profiles (templates) are used to articulate benefits and include details such as description, ownership, measurement, risks and dependent benefits, enablers and capabilities. Measures are something you can put an amount, quantity, size, ratio or a percentage against. Measures are fundamental to benefits management since they tell you whether you have achieved a benefit or not. Benefit measures also tend to be the leading measures that drive performance improvement. (Hudson 2017).

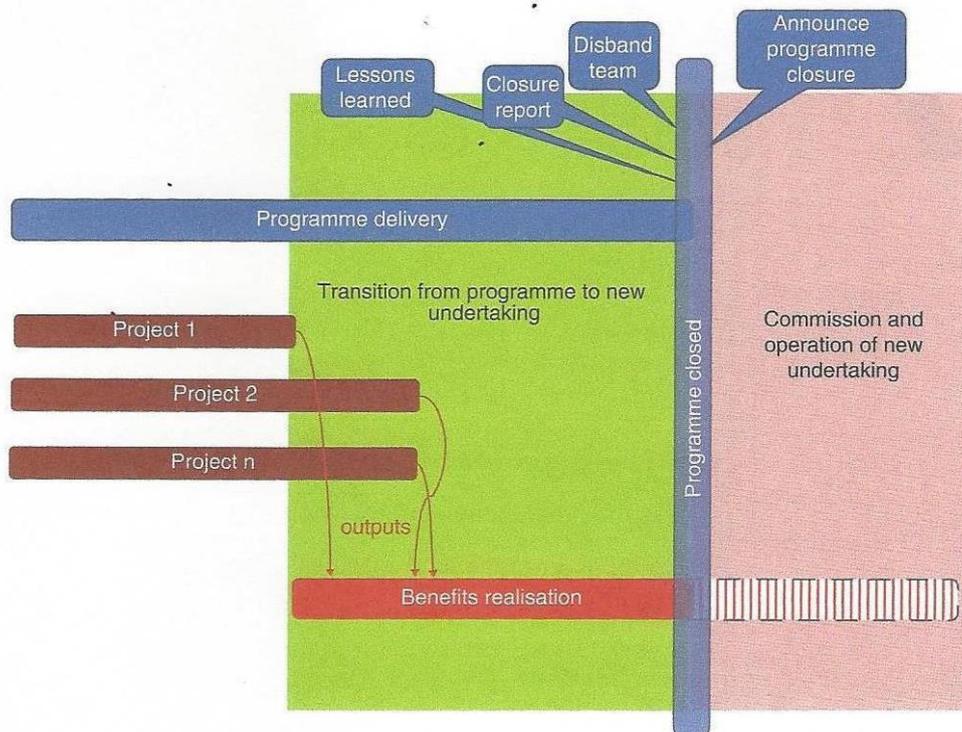
Effective program benefits management or BRM requires planning, assignment of responsibilities and a variety of actions to identify, plan, influence, track, communicate and realize benefits. One of the most effective ways to identify benefits is the categorization of stakeholders and benefits.

An example is the five-point model shown in Figure 3.

| Category             | Benefit Type (examples)                              | Possible Measures  |
|----------------------|--|--|
| Financial            | Revenue enhancement<br>Capital expenditure           | Increase revenue by 20%<br>Reduce capex by 20%                                     |
| Operational          | Efficiency<br>Effectiveness<br>Quality<br>Innovation | Increase profitability by 10%  |
| Customer             | Service<br>Reputation<br>Brand                       | Achieve 90% customer satisfaction<br>Become market leader for programme management |
| People               | Morale<br>Capability                                 | Reduce staff attrition by 20%  |
| External stakeholder | Regulatory   | Reduce CO <sub>2</sub> emission by xxx   |

**Figure 3: Five Common Categories of Benefits with Examples**  
 Adapted from the CIOB Code of Practice for Programme Management in the Built Environment (CIOB 2016)

Figure 4 shows an example of when benefits might be created and “harvested” during and after a program’s life, as projects are completed.



**Figure 4: Program Transition and Benefits Realisation Example**  
 Adapted from the CIOB Code of Practice for Programme Management in the Built Environment (CIOB 2016)

There is much more to be said about the benefits management process beyond the scope of this paper, especially including the resources required for successful BRM. In any case, BRM is

now being widely used in the UK, Australia, New Zealand and other countries for managing public sector programs.

## **BRM IN THE UNITED KINGDOM**

The UK is by far the leading source of information and guidance on program/project benefits management, per se, although one can argue that benefits realization has emerged from the broader value management discipline. (Morris 2013). Research on benefits realization began to appear in the 1980s and 1990s; primarily in information technology industries. (Dalcher 2017) 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 (OGC). MSP included 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 (Axelos 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. (UKG 2010)

The Association for Project Management (APM), the UK's chartered body for project management, has incorporated benefits realization into its "body of knowledge" (Dalcher 2017), has established a Benefits specific interest group (SIG), and has published many articles, papers and reports on the topic. The Government of Northern Ireland has published a very robust set of benefits realization guidelines, information and templates. (NIG 2007) The CIOB's Code of Practice for Programme Management in the Built Environment contains extensive coverage for UK architects, engineers, constructors and others involved with buildings programmes and projects. (CIOB 2016)

## **BRM IN AUSTRALIA**

Australia has followed the lead of the UK with the following guides and requirements for benefits realisation:

- Benefits Management Guidelines, Australian Transportation Assessment and Planning (ATAP), Commonwealth Department of Infrastructure and Regional Development (ATAP 2016)
- Benefits Realisation Management Framework, New South Wales Government, (NSW 2015)
- Benefits Management Framework, Building Queensland, Government of Queensland, Australia (Queensland 2016)

According to the New South Wales' government's Benefits Realisation Management Framework website, "The purpose of the Benefits Realisation Management (BRM) Framework is to provide a framework of best practice principles and concepts drawn from latest experiences and proven practice in setting up and managing programs that is transferable across NSW agencies." It is worth repeating here some of the principles outlined in their guidance:

- Benefits need to be first understood as outcomes. Benefits are the reason the investment is made.
- The benefits must be aligned to the organisation's strategic goals. The outcomes and benefits realisation delivered by the change help achieve strategic goals.
- Benefits Management is the cornerstone of a successful business case. Identification and understanding of benefits will provide evidence that the proposal will be effective and represents value for money.
- Benefits are not automatic. In addition to effective program management, delivery of desired benefits requires active monitoring of project/program progress and the outcomes and benefits realised.
- Benefits are both financial and non-financial. A benefit is the measurable improvement resulting from an outcome which is perceived as an advantage by a stakeholder. Benefits must be measurable and evidence based in order to demonstrate that an investment provides value.

## **BRM IN NEW ZEALAND**

The Treasury Department, Government of New Zealand, has published the following policy documents and guidelines related to BRM:

- Benefits Guidance, The Treasury, New Zealand Government. (NZG 2017)
- Managing Benefits from Projects and Programs: Guide for Practitioners, The Treasury, New Zealand Government. (NZG 2016)
- Guide to Benefits Realisation Management, New Zealand Government. (NZG 2015)
- Better Business Cases: Managing Benefits from Projects and Programmes; Treasury's Infrastructure Unit, New Zealand Government. (NZG 2014)

## **BRM IN PMI STANDARDS & PUBLICATIONS**

Benefits management is a key element (one of five primary domains) in the PMI Standard for Program Management. (PMI 2017). In 2016, PMI also focused on benefits in its three 'Pulse of the Profession' reports, titled as follows:

- Beyond the Project: Sustain Benefits to Optimize Business Value;
- Delivering Value: Focus on Benefits during Project Execution;
- Strategic Impact of Projects: Identify Benefits to Drive Business Results: (PMI 2016a).

PMI also focused its entire 2016 'Thought Leadership' series of articles on benefits realization, which had the following titles:

- Establishing Benefits Ownership and Accountability;
- Strengthening Benefits Awareness in the C-Suite;

- Connecting Business Strategy and Project Management;
- Benefits Realization Management Framework;
- Benefits Thinking Movement. (PMI 2016b)

Even with the significant emphasis on this topic by PMI, neither program benefits management nor BRM seem to have been widely adopted in the United States outside of a few information technology (IT) organizations. Little evidence was found of BRM being implemented in the U.S. federal government.

## **BRM IN COLLEGE OF PERFORMANCE MANAGEMENT**

The College of Performance Management (CPM), based in Virginia, USA has incorporated benefits management into their Integrated Program Performance Management (IPPM) model and certification program.<sup>4</sup> According to William Mathis, CPM vice president, “*IPPM is designed to build on the foundation set by EVM (Earned Value Management) processes by adding several strategic elements:*

- A. Apply a common set of conventions to integrate processes for planning, measuring and communicating between the overall enterprise and the detailed work level to serve all management needs.*
- B. Formally integrate Schedule / Resource Management (SRM) processes involving dynamic schedule planning and management (e.g., Agile methodology and similar) to ensure that a common framework serves all types of activity present on the program.*
- C. Formally integrate Technical / Benefits Management (TBM) processes involving both BRM and systems engineering technical performance measurement to ensure a strong relationship between detailed level measures of progress with stakeholder values.”...*

*CPM’s launch of the IPPM certification program continues to pursue a strategy based on improving the state of the profession through our professionals. The addition of BRM elements onto the foundation formed by 50 years of EVM experience and lessons learned improves the integration between disciplines and for the first time proactively addresses the need to align results with workscope. (Mathis 2018)*

## **BRM IN USG FEDERAL PROGRAMS: NOT!**

So why is BRM not being implemented on US government programs? Why has BRM been embraced by government agencies overseeing major projects and programmes in other countries but not in the USA? BRM may not be 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;

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<sup>4</sup> Information about CPM’s IPPM certification can be found at <https://www.mycpm.org/professional-development-units/ippm-certification/>

- 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”. (Bradley 2014)

Put more simply, Carlos Serra identified the following common barriers to successful implementation:

- Culture of assessing success based on traditional project completion metrics, not on long-term processes;
- Lack of benefits realization strategies at the organizational level, leading to lack of BRM processes;
- Lack of integration between processes and organizational functions; and
- Lack of specific processes for managing benefits. (Serra 2016)

Hudson mentions BRM implementation problems associated with the following: *low organizational maturity, with poor governance; long lead times to benefits realization; programme complexity; misunderstanding of benefits management processes; poor forecasting; inadequate information; project/programme delivery pressures; stakeholder engagement and support; and lack of benefits accountability.* (Hudson 2017)

For successful BRM implementation, organizational culture often needs 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.). Effective program management including BRM however does require adequate performance metrics, which in turn requires adequate project management. Effective BRM goes hand-in-hand with effective program and project management. In any case, implementing BRM can involve serious organizational changes, which are certainly not always easy to effect in government agencies.

## **BRM IN USG FEDERAL PROGRAMS: WHY & WHEN?**

United States Senate bill S.1550, the Program Management Improvement Accountability Act, was approved on 30 November 2016. The law was intended to reform federal program management policy in the United States to enhance accountability and best practices in project and program management throughout the federal government. The new law, co-sponsored by both Democratic and Republican Senators and heavily promoted by PMI, requires the following (among other things):

- a. Government-wide standards, policies and guidelines for program and project management for executive agencies;
- b. Implementation of program and project management for those standards, policies and guidelines;
- c. Establishment of a Program Management Policy Council;
- d. Establishment of standards and policies for executive agencies, consistent with widely accepted standards for program and project management planning and delivery;
- e. Engagement with the private sector to identify best practices in program and project management that would improve Federal program and project management;
- f. Portfolio reviews to address programs identified as high risk by GAO;
- g. Not less than annually, portfolio reviews of agency programs;
- h. A 5-year strategic plan for program and project management; and
- i. Designation of a senior executive at each agency as Program Management Improvement Officer. (PMIAA 2016)

The act was to be fully implemented within one year. Clearly this did not happen. Nevertheless, the law was enacted and the PMI Standard for Program Management is the only widely recognized standard for program management in the United States (although the new IPPM certification program from CPM may soon challenge that). It should therefore only be a matter of time before all U.S. federal agencies begin the process of implementing more formal program management policies and practices, including BRM.

## CONCLUSION

BRM can successfully link program and project outcomes (and stakeholder benefits) to organizational strategies; BRM can be a key for managing program and project lifecycles. Strategies should be based on 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.

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 matter less 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 a link between organizational strategies, programs, projects, outcomes and value.

*As Dalcher stated, a benefits 'mindset' requires understanding that benefits don't just happen, actions are required; benefits rarely happen according to plan, progress must be monitored with plans and measures adjusted as needed; and benefits management is a continuous process of envisioning results, implementing, checking intermediate results and dynamically adjusting.* (Dalcher 2017)

So what is the purpose of your government program? Why is a program being launched or implemented? What is the purpose of all of the projects and programs in a federal agency's portfolio? BRM gets to the heart of these questions? And remember this simple equation: Value = benefits – investment! We think it's time for the US government to implement BRM as other governments have done, to recognize benefits management as an obvious way to increase value for program stakeholders.

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