

## Series on project-related contributions to organisational objectives

### 3. From project outputs to organisational outcomes and benefits, and the roles of user groups, and of program/project management (PPM)<sup>1</sup>

By Alan Stretton

#### INTRODUCTION

This is the third and last of a series of three articles on some particular aspects of what I have described as project-related contributions to organisational strategic management, and to the achievement of organisational strategic objectives.

The first article (Stretton 2022a) gave some background to this series, which I have linked with a shift in focus in the 7<sup>th</sup> edition of PMI's *Standard for Project Management and a Guide to the Project Management Body of Knowledge* (PMI 2021) from direct governance and management of projects etc., to an enhanced concern with their broader contribution to advancing organisational strategy and the achievement of business objectives. The latter has also been the focus of many of my articles in this journal in the past few years, and I proposed a model which linked a linear organisational strategic management model I have been using for some time with a corresponding figure from PMI 2021. The article went on to look at some long-existing project-related supplier organisation services to owner organisations in the context of this linked basic strategic management model. It particularly focused on their contributions to the first two stages, which get little coverage in the mainstream project management literature.

The second article (Stretton 2022b) switched to internal arrangements within the owner organisation, and the contributions of portfolio, programs and projects to the context of this linked model. In particular, it focused on the variety of different meaning which are given to each of these three descriptors in the project management world, and suggested specifically augmented descriptors to better indicate where and how they contribute to organisational strategic and operational management processes.

This final article will be concerned with the roles and responsibilities of users, user groups, and program/project management (PPM), in converting project outputs to organisational outcomes and benefits. The role of users in this vitally important area receives scant attention in the project management literature, whilst the direct influence of program/project management tends to be exaggerated, particularly with regard to benefits realisation.

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This somewhat exploratory working paper will focus more attention on users' roles and responsibilities in these conversion processes, and on the scope and limitations of program/project management roles and responsibilities in these contexts.

We will first summarise some descriptors of program/project-related outputs, outcomes and organisational benefits, and give some examples from the literature of chains of progression through these stages, and their contribution to helping achieve strategic objectives. These chains do not include users who progress them. This leads to some discussion of the key role of users of outputs in achieving outcomes, and in realising benefits, followed by a very preliminary suggestion of how users might be broadly represented in the context of one of the exemplified chains of progression.

However, there are many different types of contexts in which project output-outcomes-organisational-benefits progressions are undertaken. We will review two earlier representations I developed, one of which identified three broad types of strategic initiatives (which include projects), and the other three key types of outputs/assets. These correspond closely enough to suggest using a three-type framework for further discussions of what appear to be the most dominant types of relevant contexts. The following three mainstream headings will be used.

- From project outputs to internal working efficiency outcomes, and roles of users, and program/project management
- From project outputs to internal product/service outcomes to external operational outcomes and benefits, and roles of users, and program/project management
- From project outputs to longer-term fixed asset outcomes and benefits, and roles of users, and program/project management

These three types of contexts were introduced in a rather basic way in Stretton 2021n, but this article will include much more detailed discussion about each context, the role of users in each, and contributions which program/project management makes (and/or does not make) towards achievement of outcomes by users, and realisation of benefits by the organisation.

It will also be seen that the exemplar initiatives used for each of these three contexts can be associated with two different types of organisations that undertake projects, which I described in the first article of this series (Stretton 2022a) as follows.

- **Owner organisations (OOs) (aka Production-based organisations)** derive most (if not all) of their revenue and/or benefits from producing and selling products and services. They utilize projects to create new, or improve existing, products and services; enter new markets; or otherwise improve or change their organizations.
- **Supplier organisations (SOs) (aka Project-based organisations)** derive most (if not all) of their revenue and/or other benefits from creating and delivering projects/programs to external customers.

It will be seen later that the first of the above three bullet-pointed contexts (internal working efficiency initiatives) applies to both of these types of organisations.

The second of the three (product/service development and deployment) is directly related to production-based organisations (OOs). The third type (longer-term fixed assets) is most commonly delivered by SOs, whose perspective will be followed in this article.

## **OUTPUTS, OUTCOMES, BENEFITS: DESCRIPTORS AND PROGRESSION CHAINS**

### **Some definitions/descriptors**

As is often the case in the project management literature, different descriptors are often used to identify various entities, as now discussed in relation to the above.

**Output:** *The tangible or intangible product resulting from planned activity. (OGC 2007:247)*

In addition to the synonym **product** from this definition, other descriptors for project outputs which are frequently used include **deliverables** and **capabilities**.

In Stretton 2021m, I noted that Giammalvo 2021a equates the products of projects directly with **assets** – “...the products (= ASSETS) these projects are producing ...”

‘Assets’ is also an inclusive descriptor used by Driver & Seath 2015, who say that

The fundamental role of all organizations is to create assets (services, products, infrastructure) and enable people to use these to create benefits.....

I have included the descriptor **assets** in some of my later discussions of various aspects of users converting output assets to outcomes and benefits.

**Outcome:** *The result of change, normally affecting real-world behaviour and/or circumstances (OGC 2007:247)*

The synonym **result** is also used by Driver & Seath, and in the following definition of outcome in PMI 2021:244.

Outcome: An end **result** or consequences or a process or project

Another virtual synonym for outcomes suggested by Driver & Seath 2015 is **uses**.

**Benefit:** *The measurable improvement resulting from an outcome perceived as an advantage by one or more stakeholders. (OGC 2007:245)*

PMI 2017 identifies various types of benefits in its introductory section in *Ch 4. Program Benefits Management*, as follows.

Various types of benefits may be defined and generated by programs. Some benefits, such as expanded market presence, improved financial performance, or operational efficiencies, may be realized by the sponsoring organization while other program

outcomes may be realized as benefits by the organization’s customers or the program’s intended beneficiaries.

In this article we will be initially concerned mainly with the sponsoring (owner) organisation, but later will take some account of outcomes and benefits for customer organisations.

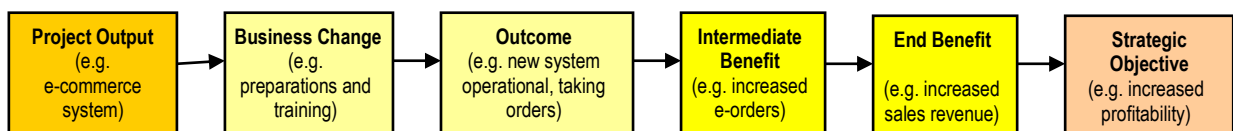
**From outputs to outcomes to benefits to strategic objectives progression chains**

OGC 2007:64 has a Table 7.1 which gives several examples of difference between outputs, outcomes and benefits. The first of these examples, depicted in Figure 3-1 below, gives very useful definitions (in bold type) which I will draw on later. I have also augmented the outcome and benefits definitions (in parentheses) to include their use (by undefined users at this stage), which also helps provide a sense of progression.

Project outputs/capability	Outcome	Benefit
<b>Enables a new outcome in part of the operational organisation</b>	<b>Is the desired operational result</b> (derived from <b>use</b> of project outputs)	<b>An end benefit</b> (deriving from <b>use</b> of outcomes) <b>is a direct contribution to a strategic objective</b>

**Figure 3-1: Augmented definitions/descriptors of project outputs, outcomes and benefits**

A much more specific example of a flow from project outputs through outcomes to benefits comes from OGC 2007:63, Figure 7.3, which gives the following example of a project output to strategic objective chain, and adds some detail to Figure 3-1.



**Figure 3-2: Example of a project output to strategic objective chain. Adapted from OGC 2007, Fig7.3**

OGC 2007:63 comments on this as follows.

Figure 7.3 illustrates how outputs from projects together with associated organisational changes will produce outcomes, but changes alone will not produce measured improvements (benefits).

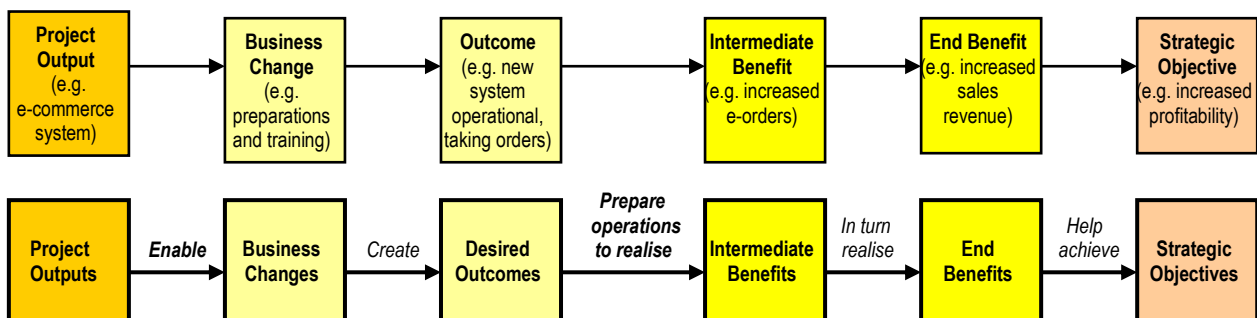
The following points derive from the above.

- The OGC quotation shows that work needs to be done (“business changes”) to convert project outputs into outcomes. However, there is no mention of who does this – i.e. who are the users.
- In some cases project management may help users achieve outcomes, but project managers are not the actual users who ultimately achieve outcomes.
- Outcomes on their own do not produce benefits. Their use by business operations (or equivalent) is needed to help realise benefits

- Therefore project management, which delivers project outputs, cannot normally claim to directly deliver benefits – contrary to what is often implied in the literature.

**Adding action indicators between components of the outputs-to-benefits chain**

I have reconfigured the OGC example of a project-output-to-strategic-objective chain in Figure 3-2 to align it with the relevant portion of a corresponding figure from Serra 2015, which adds specific activities between each component of the chain (this time without the OGC example of these components) as shown in Figure 3-3.



**Figure 3-3: Adding a corresponding section of a model adapted from Serra 2015**

**The desirability of adding provision for the user groups which take these actions**

Serra’s addition of types of actions which link each component of the project-output-to-strategic-objective chain suggests that we should complete the picture by making specific provision for the user groups which actually undertake these actions. Such users tend to be neglected in the literature. But, they are obviously very important in these contexts, as now further discussed.

**THE KEY ROLE OF USERS IN ACHIEVING OUTCOMES AND BENEFITS**

**A comparative neglect of the role of users in the project management literature**

As indicated in the last quotation above from OGC 2007, and the bullet points following it, project management does not directly produce benefits. Users of both outputs and outcomes are needed for these to be realised. This point is emphasised by many writers, as illustrated in the following.

Benefits don’t get “realised” by Project Managers ..... Benefits emerge from **Uses**. It is essential for Project and Programme Managers to understand that users of Results are the main actors in any strategy. (Driver & Seath 2015)

Dalcher 2015 also points to the importance of use, and users.

... it is use that provides benefits, and not the project ...

Users are an important, yet often forgotten part of projects – as they are the key to the utilisation of benefits.

Yet, in spite of their obvious importance, **users** of project outputs and outcomes do not get commensurate coverage in the project management literature.

This is particularly the case with project management bodies of knowledge, as Dalcher 2015 noted in the following observation.

The project management bodies of knowledge offer scant information about dealing with users, understanding their needs, obtaining their feedback, establishing buy in, managing their expectations, or even communicating with users. ....

This comparative neglect of the role of users is reflected in the most recent edition from PMI 2021:

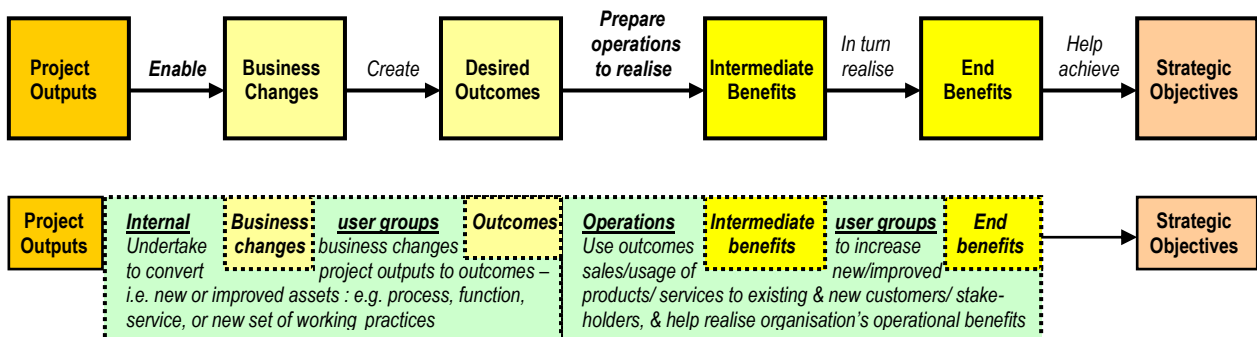
....*The Standard for Project Management* and the *PMBOK Guide* emphasise that projects do not simply produce outputs, but more importantly, enable those outputs to drive outcomes that ultimately deliver value to the organization and its stakeholders.

There is no mention here of which users “enable those outputs to drive outcomes”, let alone who ensures that these outcomes “ultimately deliver value [benefits] to the organization and its stakeholders”.

In this article we will be concerned with trying to build up a skeleton framework and tentative proposals to significantly highlight the roles and responsibilities of users in an organisational strategic and operations management context.

### Adding (preliminary) provision for users in the outputs-outcomes-benefits chain

In the following figure I have used Serra’s contribution to Figure 3-3 above as the basic outputs-to-outcomes-to-benefits chain, and have (somewhat tentatively) depicted two sets of user groups, broadly aligned with the components of Serra’s chain.



**Figure 3-4: Preliminary depiction of internal user groups converting outputs to outcomes and (external) operations user groups converting outcomes to benefits in the outputs-benefits chain**

This preliminary depiction of types of users of project outputs and of outcomes does not indicate who the users are, or the roles program/project management may play. In the *Internal user groups* section, I have drawn on the following quotation from OGC 2007:71 to depict the types of possible outcomes.

The programme will deliver new capability as a new process, function, service or set of working practices, and will enable the business operations to implement these.

In the *Operations user groups* section, I have tried to summarise the actions users such as a Product manager or Marketing manager might take in the organisation’s markets.

However, to develop more detail we need to identify more specific types of contexts in which project output-outcomes-organisational-benefits progressions are undertaken. We will now review two earlier representations I developed, one of which identified three broad types of strategic initiatives (which include projects), and the other three key types of outputs/assets. These correspond closely enough to suggest using a three-type framework for further discussions of what appear to be the most dominant types of relevant contexts, as now discussed.

### THREE TYPES OF STRATEGIC INITIATIVES (PROJECTS), AND OUTPUT ASSETS

#### An earlier representaton of three broad types of strategic initiatives

Stretton 2020e developed the following figure which depicted three broad types of strategic initiatives, and summarised responsibilities for benefits realisation management (BRM) in the contexts of these broad types.

INTERNAL EFFICIENCY INITIATIVES	EXTERNAL EFFECTIVENESS INITIATIVES			
Business & Organisation Change Information Systems (Software) Research & Development  “Stay-in-Business” initiatives	<u>Shorter-term Production-related</u> Product & Service Development Events Media & Entertainment Healthcare	<u>Longer-term Asset-related</u>		
		Facilities (commercial production; public infrastructure) Communication Systems	International Development	Aerospace/ Defense
<b>Responsibilities for BRM</b> <ul style="list-style-type: none"> <li>• If users have a formal organizational representative, the latter is responsible</li> <li>• If there is no designated user representative, then project/program mat. is usually held responsible</li> </ul>	<b>Responsibilities for BRM</b> <ul style="list-style-type: none"> <li>• Responsibility is with designated mgr. interfacing with organisation’s markets/customers – e.g. Product Mgr, Events Mgr, Producer</li> <li>• Project/program mgt has no direct involvement in ultimate BRM</li> </ul>	<b>Responsibilities for BRM</b> <ul style="list-style-type: none"> <li>• Responsibility is with the owners and/or designated user representatives</li> <li>• Project/program mgt has no direct involvement in, or responsibility for, final BRM</li> </ul>	<b>Resp. for BRM</b> <ul style="list-style-type: none"> <li>• Varies</li> <li>• Often shared between PPM providers and ultimate user representatives</li> </ul>	<b>Resp. for BRM</b> <ul style="list-style-type: none"> <li>• Varies</li> <li>• Benefits often focus on utility of project/program deliverables themselves.</li> </ul>

**Figure 3-5: Summarising types of strategic initiatives and responsibilities for BRM (Stretton 2020e)**

The representation shown in Figure 3-5 uses the broader descriptor *initiatives*, which is shorthand for *strategic initiatives*, rather than *projects*, following this definition by Cooke-Davies 2016:259.

[A strategic initiative is] ‘a project, portfolio of projects, other discrete programme or series of actions undertaken to implement or continue the execution of a strategy, or

that is otherwise essential for the successful implementation or execution of a strategy’.

One reason for using this broader descriptor is that I am giving primary attention to the strategic management processes of the owner organisation, rather than on associated projects – therefore strategic-related descriptors appear to be more appropriate. The other reason is because, as indicated in the above quotation from Cooke-Davies, strategic initiatives cover not only projects, but also other associated components that are needed to successfully implement organisational strategy, and which I specifically wish to provide for.

For the purposes of this article, the following three types of strategic initiatives were identified, under the above two broad headings

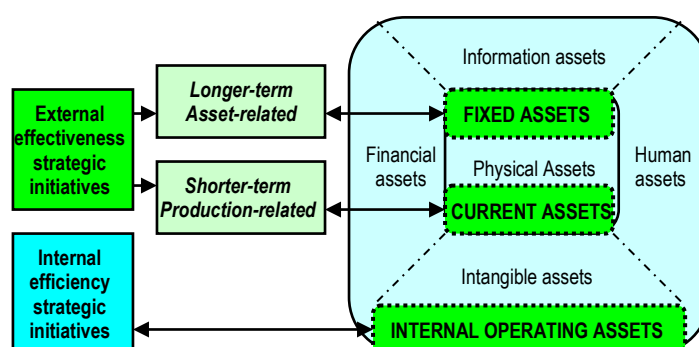
- Internal efficiency initiatives
- Shorter-term production-related external effectiveness initiatives
- Longer-term asset-related external effectiveness initiatives

Responsibilities for benefits realisation management (BRM) were also summarised, but with little detail about outcomes, or actual/ potential project management involvement. I will be revisiting and revising these in the light of later more detailed investigations.

### Relating these three types of initiatives with three principal types of assets

As I discussed in Stretton 2021n, many authors regard the outputs of projects as being assets – e.g. Giammalvo 2021a, Driver & Seath 2015. In the context of these discussions, it should be noted that I do not regard the output of a project as being an asset until its users actually activate it, thereby converting it from a potential asset to an active asset (an outcome), whose use then contributes to ultimate benefits for the organisation. However, describing the project output in terms of the type of resulting asset is a convenient kind of shorthand, which is evidently used by many people.

The following figure shows a representation of types of assets from Stretton 2021n on the right, and shows links between three of the principal types of assets to the three main types of strategic initiatives from Figure 3-5, as bullet-pointed above.



**Figure 3-6. Illustrating correspondence between the main types of strategic initiatives in Figure 3-5 and three principal types of assets identified in Stretton 2021n**



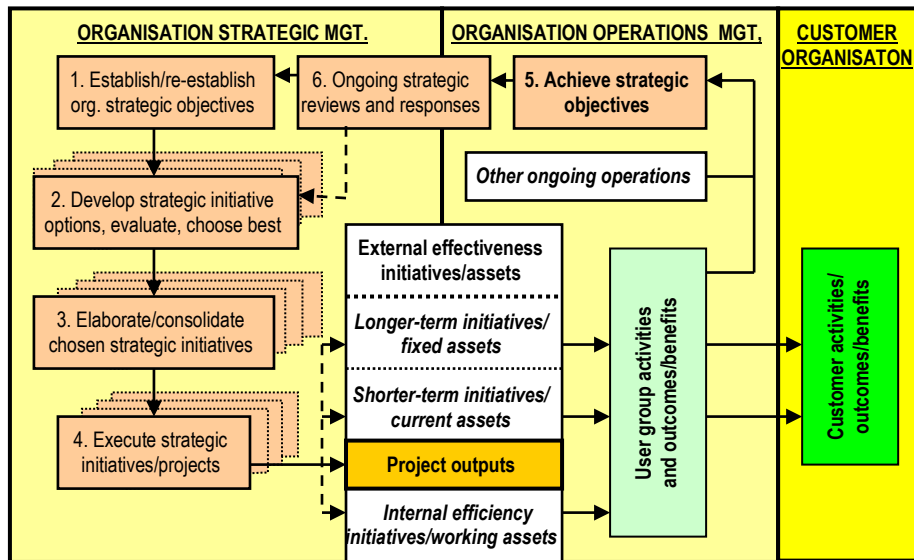
It can be seen that there is a close correspondence between the three types of strategic initiatives and the three main types of assets.

**Three combined initiation/asset descriptors adopted for further discussions**

I have chosen to use the following descriptors for each of these three corresponding entities which have elements of both types, in the following discussions.

- **Internal efficiency initiatives/ working assets**
- **Shorter-term initiatives/ current assets** }
- } [External effectiveness initiatives/assets]
- **Longer-term initiatives/ fixed assets** }

Further, I propose to discuss the progression of each of these three groups from project outputs to outcomes and benefits, and the role of users, and program/project management, in these progressions – all in the context of a recursive version of the linear organisational strategic management sequence used in the first two articles of this series, along the lines schematically depicted in Figure 3-7.



**Figure 3-7. A schematic representation of users converting three key types of project outputs to outcomes/benefits, in the context of a recursive organisational strategic management sequence**

It can be seen that I have also provided for customer organisations which receive products/services from OOs (current assets), and/or fixed asset outputs from Sos.

I have chosen the following rather long-winded, but hopefully accurate, descriptors as the main heading for the following detailed discussions about these three progressions, and roles and responsibilities of users, and of program/project management.

- From project outputs to internal working efficiency outcomes, and roles of users, and program/project management
- From project outputs to internal product/service outcomes, to operational outcomes and benefits, and roles of users, and program/project management
- From project outputs to longer-term fixed asset outcomes and benefits, and roles of users, and program/project management

We now move on to discuss the first bullet pointed heading in more detail.

## **FROM PROJECT OUTPUTS TO INTERNAL WORKING EFFICIENCY OUTCOMES, AND ROLES OF USERS, AND PROGRAM/PROJECT MANAGEMENT (PPM)**

### **Internal working efficiency outcomes – Business/organisation change**

Figure 3-5 nominated four examples of internal efficiency initiatives – Business & Organisation Change, Information Systems (Software), Research & Development, and “Stay-in-Business” initiatives. For the purposes of this rather exploratory investigation, I propose to use the broad descriptor *Business/organisation change* to cover all four.

Further, I will use the *new set of working practices* component of an earlier quotation from OGC 2007:71, as also shown in Figure 3-4, as the prototypical example of *Business/organisation change* in the following discussions.

**Ultimately, it is the actual users of the project outputs who achieve the outcomes.**

This rather obvious fact tends to be overlooked in the project management literature, which is more preoccupied with the part project management may play in achieving outcomes, and often overstate its contribution. We will come back to this shortly.

Now, in the context of achieving business/organisation change outcomes, the actual users will comprise most of the people in that organisation. In these circumstances, someone will usually need to be designated to represent the interests of all these users, and particularly to ensure that the changes are fully adopted by them.

### ***Cases where users are represented by a Business Change Manager***

In large organisations, and/or with “transformational”-type changes, a designated Business Change Manager (BCM), is often appointed to represent the users. The BCM is then held accountable for overall achievement of the outcomes.

OGC 2007:57, Table 6.4, says that the Business Change Manager is responsible for

Engaging and leading those operating new working practices through the transition, generating confidence and buy-in from those involved.

APM 2012:124 also discusses the responsibilities of Business Change managers in this context as follows.

Day-to-day responsibility for the implementation of change and realisation of benefits lies with one or more business change managers. The relationship between the project or programme manager and the business change manager is crucial. The delivery of outputs and the management of change must be closely coordinated.

Thiry 2010:88 contends that the position of Business Change Manager is only warranted in the case of what he describes as “highly strategic” programs.

Only in the case of highly strategic programs would the role of Business Change Manager be warranted and this role would mainly entail preparing the organization for the change, which the program manager cannot always do.

I interpret Thiry’s “strategic programs” to be related to certain types of large organisations, and/or with “transformational”-type changes, which OGC 2007:62 describes as follows.

MSP [the OGC publication *Managing Successful Programmes*] is designed for transformational change (e.g. a retailer who chooses to abandon physical outlets and to retail solely through an online presence) rather than incremental changes within an existing enterprise model (e.g. improving another similar product or service offering).

As Thiry implies, and OGC appears to tacitly endorse, the formal appointment of Business Change Managers is evidently only warranted in particular circumstances.

However, before turning to circumstances where the users are not represented by a BCM, we note that the above quotation from APM 2012 emphasises that the relationship between the project or programme manager and the business change manager is crucial.

In other words, although the Business Change Manager is responsible for the achievement of the outcomes, program/project management has an important role to play in working with the BCM to help the latter achieve these outcomes.

### ***Cases where users do not have a designated representative***

This would appear to be the more common situation for organisations undertaking types of business/organisational changes which are more incremental than the types of transformational change discussed above.

We start with the following quotation from Thiry 2010:88.

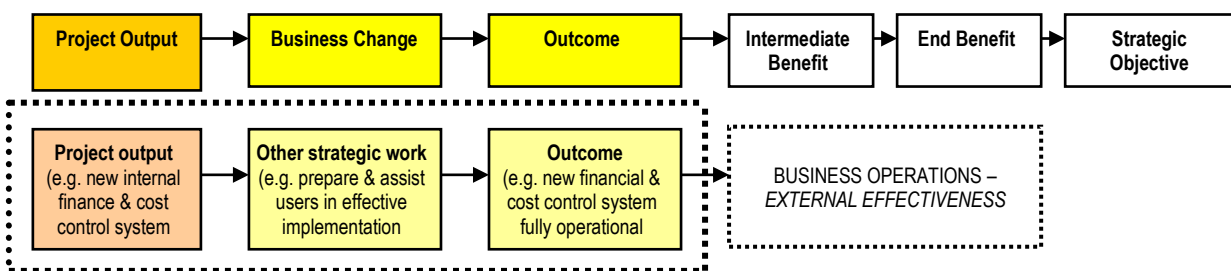
In my experience the traditional handover process is not really effective for programs that deal with organizational change, and the role of the program manager should extend beyond the delivery of project outputs.

This is also my personal experience as project manager for two major organisational change-related projects in Civil & Civic. One of these projects comprised the development and implementation of an entirely new cost and financial accounting system for the whole organisation. There was no way I could simply hand over the project output – the system – and expect it to be automatically implemented by the users, even though we had had substantial consultation with so many of them during its development. Although use of this system was mandatory, in practice it involved my working closely with a host of key people to get them to the point where they adopted it as their system, in the sense of their taking ownership and responsibility for on-going implementation – and also in making recommendations for changes when deemed important.

So, although it was the users who ultimately achieved this outcome, as the project manager I was actually held accountable for securing this conversion of the outputs to these outcomes.

**Illustrating an example business/organisation change sequence, and also user involvement in such a change sequence**

I have used the format of the OGC 2007 chain shown in Figure 3-2 as a basic template, under which I have illustrated the particular organisational change initiative just discussed, as a specific example of a new set of working practices.



**Figure 3-8. Illustrating an example business/organisation change sequence**

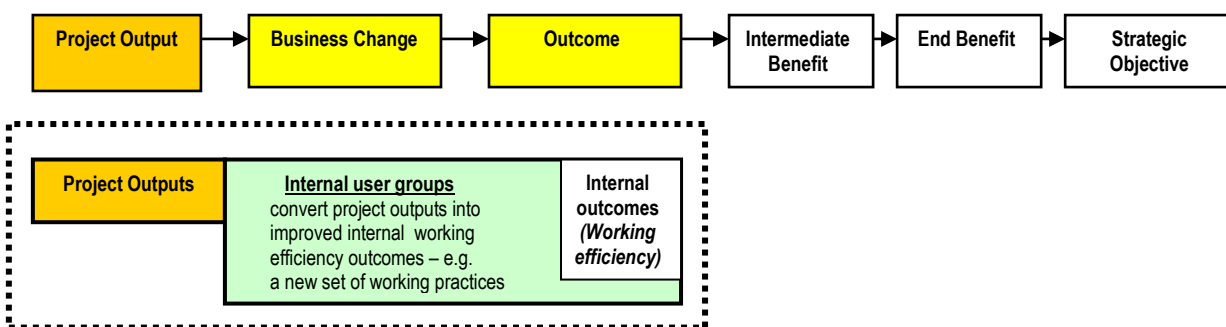
**A note about “other strategic work”, and program/project management**

It will be noted that I have changed the descriptor for the second component of the change sequence from OGC’s *Business Change* to *Other strategic work*. This is because, as I have discussed in some detail in Stretton 2019a, project outputs generally need to be accompanied by some other relevant strategic initiatives if the intended outcome is to be achieved. This appears to be the intent of OGC’s *Business change* descriptor, but I am not certain about this, so have changed the descriptor accordingly.

Now, it should also be noted that many definitions of programs include not only projects, but what PMI 2017:13 describes as *Other program-related activities*. In this context the latter is equivalent to my broader descriptor *Other strategic work*. Therefore, if the project were part of this type of program, the program manager would have some responsibilities in also ensuring the effective execution of *Other strategic work*.

In the case of the above example of the project which I personally managed, it can be seen that I was also responsible for the nominated *Other strategic work*. So, I guess that, in another environment, I might have been described as a program manager.

In my preliminary depiction of internal user groups converting outputs to outcomes in Figure 3-4 above, I provided for the internal users to undertake OGC's *Business change*, even though I was rather uncertain about what it covered. However, in the context of outcomes which provide for a new set of working practices, I have discarded the *Business change* entry, and provided a more specific description of the role of users, as shown in Figure 3-9 below.



**Figure 3-8: Illustrating user involvement in a new working practices internal efficiency initiative**

I will use the lower section of this figure in later amalgamations of user involvements

**Summarising this section on internal working efficiency outcome sequences, and the role of users, and of program/project management**

- Internal efficiency initiatives aim to achieve internal outcomes. Internal outcomes are not benefits. Benefits can only be realised later, by users in the external effectiveness domain(s).
- Ultimately it is the users of the outputs who achieve the outcomes.
- However, if they are very numerous – as so often applies with business or organisational change initiatives – someone needs to be designated to represent their interests, and ensure the changes are adopted by all users.
- In large organisations, and/or with “transformational”-type change, a Business Change Manager (BCM) is often designated to represent the users. The BCM is then held accountable for overall achievement of the outcomes.

- In this case program/project management typically works closely with the BCM to help the latter convert project outputs to internal efficiency outcomes.
- If there is no such designated representative, then the program/project manager often becomes the de facto user representative, and is held responsible for ensuring that the users achieve the outcomes.

INTERNAL EFFICIENCY INITIATIVES
Business & organisation change "Stay-in-Business" initiatives
<b>Responsibilities for achieving internal efficiency outcomes</b> <ul style="list-style-type: none"><li>● If users have a designated organizational representative, such as a Business Change Manager, the latter is responsible for outcomes</li><li>● If there is no designated user representative, then project/program mgt. is often held responsible for ensuring users achieve outcomes</li></ul>

Regarding the relevant sector in Figure 3-5, in light of the later analyses discussed above, I would now revise it as shown to the left.

The main revision is to change *BRM (benefits realisation management)*, to *achieving internal efficiency outcomes*, to reflect the recognition (noted in the first bullet point above) that internal outcomes are not benefits, since benefits can only be realised later, by users in the external effectiveness sector(s).

Another direct corollary of this is that it cannot be inferred in any way that project management has any direct role in benefits realisation in the above context.

Of course, organisations do not undertake improvements to the efficiency of their internal operations just for the sake of it. Their ultimate aim is to improve the effectiveness of their external operations. We will return to connections between internal efficiency initiatives and operational effectiveness later. In the meantime, we note that *Business/ organisation change* initiatives are more widely discussed in the project management literature than the other two groups of initiatives we are about to discuss – which may be partly due to the fact that, as indicated in the Introduction, the former cover both OO and SO organisations, whilst the latter are restricted to one or the other.

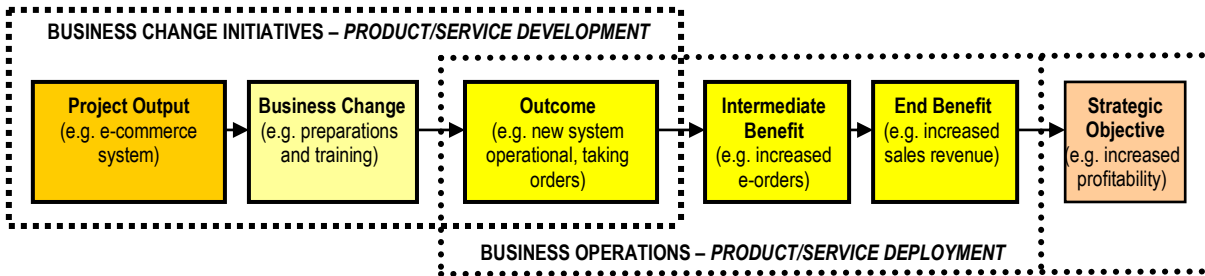
## FROM PROJECT OUTPUTS TO INTERNAL PRODUCT/SERVICE OUTCOMES TO OPERATIONAL OUTCOMES AND BENEFITS, AND ROLES OF USERS, AND PPM

Figure 3-5 gave four examples of what were described as shorter-term production-related initiatives, including Product & service development, Events, and Media & entertainment. After further consideration, I am inclined to the view that *product/service development and deployment* is a reasonably good prototypical example of this type of strategic initiative, and have therefore adopted the shorthand *product/ service* outcome to describe it, as reflected in the above heading.

### Product/service development/deployment has both internal & external initiatives

I have used the OGC example of a project output to strategic objectives chain from Figure 3-2 above because it gives a specific example of a product/service development and deployment – in this case, a new e-commerce system. I have also specifically distinguished between the product/service development components, which are in the

internal business change initiatives sector, and the product/service deployment components, which are in the external business operations domain.



**Figure 3-9: Distinguishing between internal and external initiative sectors in OGC's project-output-to-strategic-objectives chain, with their product/service development/deployment example**

We will now look at each of the two major sectors in this figure in more detail.

### The product/service development business change initiative sector

The three components of this first sector of the chain in Figure 3-9 have much in common with the corresponding components in Figure 3-7, which was concerned with internal working efficiency outcomes. In this product/service development context, the OGC exemplified output is an e-commerce service system, converted to a ready-for-use outcome, to be utilised by external business operations to convert to external outcomes.

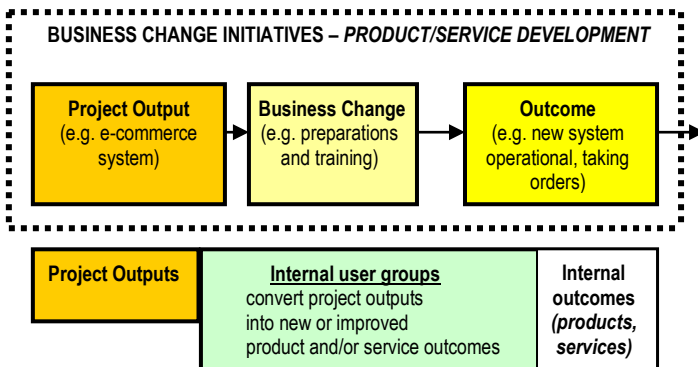
**Users/user representatives:** In the case of very substantial product/service initiatives, there are likely to be many users in this development stage, for whom a designated representative would appear to be appropriate.

Indeed, OGC has presented the above chain as a prototypical example of what it describes as a transformational change, to which it generally assigns a Business Change Manager, who is held responsible for ensuring the the users achieve the desired outcomes.

However, not all product/service initiatives involve so many people in converting outputs to outcomes in this development stage. In my experience in Civil & Civic with product/service development, a designated manager would be appointed to develop individual product/service-related outputs to ready-to-use outcomes. The project manager who delivered the outputs was usually also strongly involved in helping the designed manager achieve them, but was not held accountable for achieving the outcomes. However, we did have one exception. The most outstanding R&D specialist in my department (Alan Cull) would not only deliver the basic R&D product, but also lead its transformation into a ready-to-use outcome. But he was quite uniquely multi-talented in this regard – my other R&D specialists did not have this extra ability, but always played a supporting role in helping others achieve these outcomes.

An associated issue is the desirability of involving deployment stage users in the development stages whenever this is feasible, for rather obvious reasons.

I have summarised internal user group involvement in the following figure in a similar mode to that used for internal working efficiency initiatives in Figure 3-8.



**Figure 3-10. Illustrating user involvement in a product/service development strategic initiative**

I have described the outcomes as *Internal outcomes (products/services)*, to distinguish them from outcomes which are associated with the deployment stage, which I have described as *operational outcomes*.

We now move on to look at the product/service deployment sector.

### **The product/service deployment business operations sector**

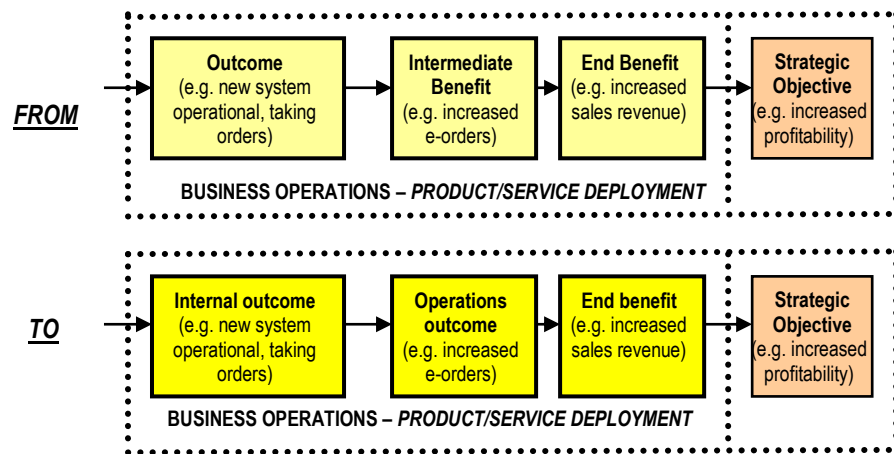
#### ***Changing two headings in the deployment sector of the OGC chain***

The first thing I have done in this section of the OGC chain shown in Figure 3-9 is to make a couple of changes to its descriptor headings, as shown in Figure 3-11 below.

The first change is fairly straight-forward, which is changing the initial *Outcome* to *Internal outcome*. This is to distinguish it from what I am now calling *Operations outcome*, a descriptor I have used to replace *Intermediate Benefit*.

I have made the latter change because it appears to me that *increased e-orders* is really an outcome, if we follow OGC's own definitions, as discussed earlier in this article.





**Figure 3-11. Changing two descriptor headings in the product/service deployment sector**

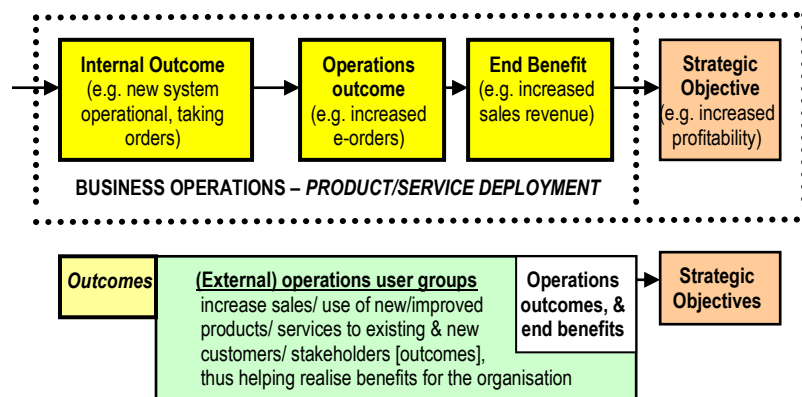
**Users in the product/service deployment sector**

We appear to have very little material in the project management literature about users in this sector. There could evidently be many kinds of users, depending on the particular contexts in which the activities in this sector are undertaken.

In this sector, users could be broadly defined as managers who are designated to interface with the organisation’s customers and/or marketplace. Such designated managers could be accorded a variety of titles, such as Product manager, Events manager, Marketing manager, or Sales manager – and probably a host of others.

Following the tenor of the above discussions, these users would be held accountable for achieving operating outcomes. Hopefully the latter will also contribute to the realisation of end benefits for the organisation. However, responsibility for achieving the latter is another matter, which we will look at further in a moment.

In the meantime, I have summarised the role of operational users in the product/service deployment sector as follows.



**Figure 3-12: Illustrating user involvement in the product/service deployment stage**

### ***Realisation of end benefits for the organisation***

It would appear to be difficult to generalise on who should be responsible for end benefits for the organisation. However, it appears to me that this responsibility lies with owner organisation's top management, or its appointed nominee.

OGC 2007:245 defines a position of Benefits Realisation Manager as follows.

An optional role within an organisation that is responsible for maintaining a permanent centre of expertise within the organisation, providing objective challenge of benefits, measures, targets and a programme approach to benefits realisation.

However, OGC's Figure 18.2 very clearly places responsibility for realising the benefits squarely with a Business Change Manager.

APM 2012: Section 3.2.1 discusses *Benefits management* in the context of organizational change in much the same way as OGC. It says (p.124):

Day-to-day responsibility for the implementation of change and realisation of benefits lies with one or more business change managers.

Koch & Lock 2016:420 discuss the role of programs in IT and business change, and also advocate the appointment of one or more Business Change Managers to "oversee the changes needed to realize the intended benefits".

### ***Emphasising that benefits do not get realised by project managers***

As is evident from the above analyses, the roles of program/project managers normally cease well before work on achieving external outcomes even begins. Therefore, if we accept the definitions of benefits discussed earlier in this article, program/project management has absolutely no direct involvement in realising organisational benefits.

Many writers have made the point very specifically. For example, Driver & Seath 2015 make the following observations.

Of course, most Project and Programme Managers will understand that they can't "realize" benefits since the majority of benefits come about after a project has finished and people start making use of the things that have been created.

Hudson 2017 says,

Benefits realization is the responsibility of the programme's beneficial owners not the programme. (Hudson 2017)

Cooke-Davies 2002 expressed his position very directly as follows.

...benefits are not delivered or realized by the project manager and project team, they require the actions of operations management.

However, the project management literature still has many instances of implications, and sometimes downright assertions, that program/project management directly delivers benefits. Indeed, such an implication can be drawn from the following definition of programs in OGC 2007:4

In MSP ["Managing Successful Programmes"], a programme is defined as a temporary, flexible organisation created to coordinate, direct and oversee the implementation of a set of related projects and activities in order to deliver outcomes and benefits related to the organisation's strategic objectives.

The following definition from Thiry 2016 appears to be a straightforward assertion directly that program management can deliver benefits directly.

As a discipline it [program management] has reached a point where, today, the main program standards management and writers agree that it is meant to deal with complex and turbulent situations and to deliver benefits, not products.

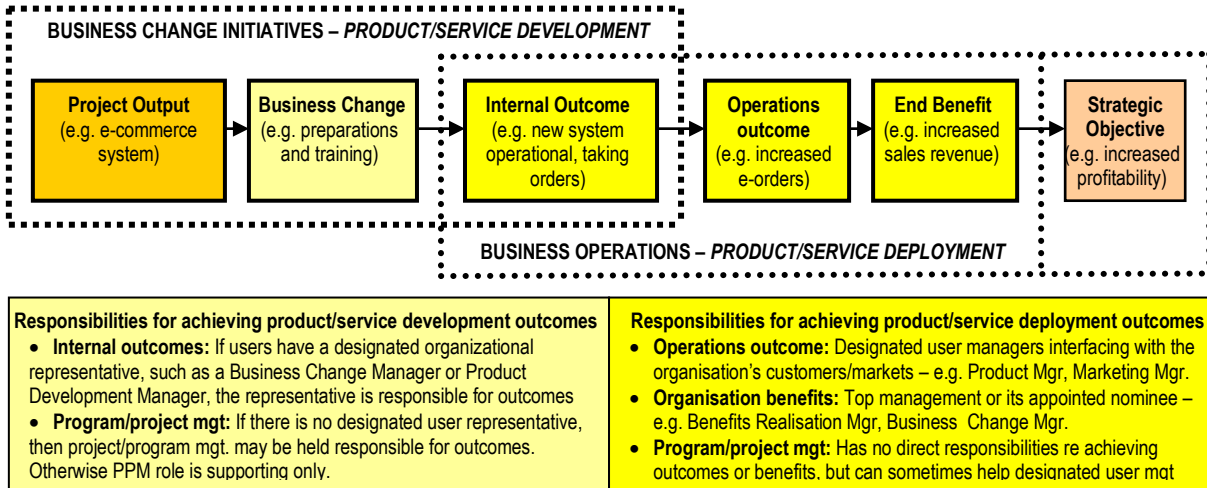
So, differing perspective about project management's contribution to the realisation of organisational benefits are alive and well. I have been maintaining that neglect of the users of project outputs can account for at least some of these differences. But, perhaps there are other reasons as well?

### ***What about the customer organisation recipient of these products/services?***

There are also outcomes and organisational benefits consequences for the customer organisations which receive these products/services. I have represented these in Figure 3-14 below, along with cumulated illustrations of other summaries discussed to date.

But we first present a shorthand summary of user and program/project management roles and responsibilities in the context of the product/service chain.

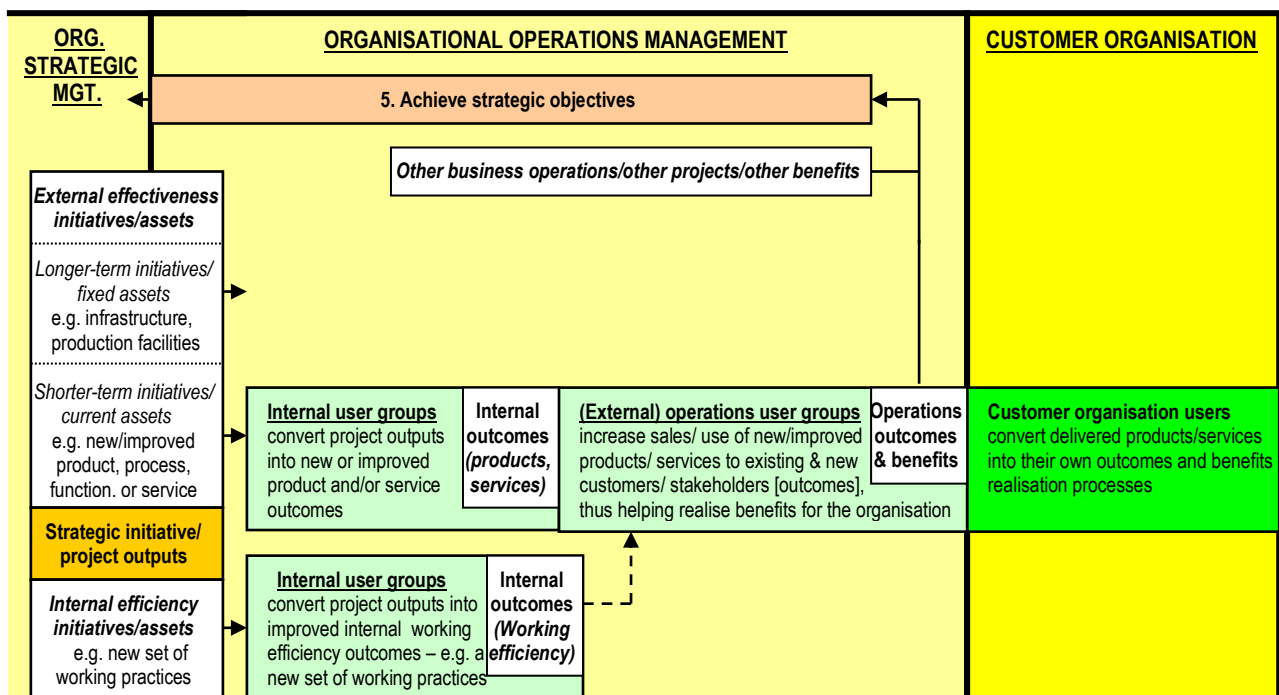
**Shorthand summary of user and program/project mgt. role and responsibilities**



**Figure 3-13. Shorthand summary of user and PPM roles and responsibilities in product/service**

**Cumulating user summaries to date into the format of Figure 3-7**

The user involvement summaries for product/service development and deployment in Figures 3-10 and 3-12 respectively are illustrated in seriatim in Figure 3-14 below, together with a text-box for customer organisation usage. I have also added the user involvement summary for new working practices internal efficiency initiatives in Figure 3-8. This is linked with the *External operations user groups* above it, indicating its longer-term purpose of helping improve operational effectiveness.



**Figure 3-14. Cumulating user summaries to date into the broad format of Figure 3-7**

## **FROM PROJECT OUTPUTS TO LONGER-TERM FIXED ASSET OUTCOMES AND BENEFITS, AND ROLES OF USERS, AND PROGRAM/PROJECT MGT.**

In Figure 3-5 I nominated *Facilities (commercial production; public infrastructure) and Communication Systems* as examples of the longer-term fixed asset type of strategic initiative. There are a multitude of possible exemplars, and, as can be seen in Figure 3-14 above I changed the above slightly, and chose *infrastructure and production facilities* to represent this type.

Although Giammalvo 2021b has made provision for “in house” delivery of these types of fixed asset initiative, virtually all of the cases I know of have been outsourced, which Giammalvo discusses as follows.

....depending on the contracting type, the owner would either hire their own engineers and do their own procurement or, more often, outsource the entire package using an Engineer, Procure, Construct and Commission (EPCC) or Design-Build contract. If the owner hired their own engineers and did their own procurement, then they would outsource the construction only using a Design>Bid>Build where the contractor built only what the owner designed.

### **Representing the perspective of a Supplier Organisation contractor**

I have elected to represent the perspective of a Supplier Organisation (SO) contractor in the following discussions. In this representation, the project output is delivered direct to the customer – the Owner Organisation (OO) – at the conclusion of the project, after relevant contracted transition undertakings such as commissioning. The conversion of these outputs into outcomes and benefits is then in the hands of the OO. The SO project management normally has no further involvement with the OO, and no influence on any aspect of achieving the OO outcomes or realising its benefits.

As previously noted, PMI 2017 says that,

Various types of benefits may be defined and generated by programs. Some benefits, such as expanded market presence, improved financial performance, or operational efficiencies, may be realized by the sponsoring organization while other program outcomes may be realized as benefits by the organization’s customers or the program’s intended beneficiaries.

In the context of this segment of the article we are talking about a supplier organisation delivering asset outputs to a customer organisation. We look first at the outcomes and benefits situation with the former.

### **Outcomes and benefits for the supplier organisation**

When the supplier organisation delivers asset outputs directly to a customer organisation, it effectively achieves its outcomes at the point of final delivery and acceptance of these deliverables, and its benefits at the point of receipt of final payment by the customer organisation.

As Giammalvo 2021a records,

Only CONTRACTORS can recognize “value” or “benefits” directly from the PROJECT, usually in the form of PROFITS (Financial Assets) and/or REPUTATION (Intangible Assets).

### **Outcomes and benefits for the customer organisation**

The management of longer-term assets will vary greatly depending on the type of asset, the nature of the customer organisation’s business, changes in its environment, the lifetime of the asset, and many other factors – as will the corresponding achievement of outcomes and the realisation of benefits.

Responsibilities for achieving outcomes will commonly be assigned to designated managers. With his background in the oil and gas industries, Giammalvo describes accountable managers as Asset Managers, and Operations Managers. I discussed some aspects of assets management in Stretton 2021k, drawing on Publicly Available Specification PAS 55 for asset management by the Institute of Asset Management (IAM) and British Standards Institution (BSI). The existence of these documents highlights the fact that asset management is a major discipline in its own right.

In Lend Lease, the management of commercial and retail building assets was undertaken by a subsidiary company, Lend Lease Investments, with investment managers held accountable for performances for individual investments. This is a very different discipline from project management.

Another factor with long-term assets is the time factor. A particularly long-lived example of a fixed asset is the Bingham Canyon copper mine in Utah, which has now been operating for well over a century. In the Lend Lease Investments building-related assets, life spans of the order of fifty years were commonly expected.

In these circumstances, it is obvious that the Supplier Organisation’s project management can have no direct influence on the customer organisation’s achievement of outcomes or realisation of benefits.

In the context of the provision of roads in the Queensland Department of Main Roads, McGrath 2007, said

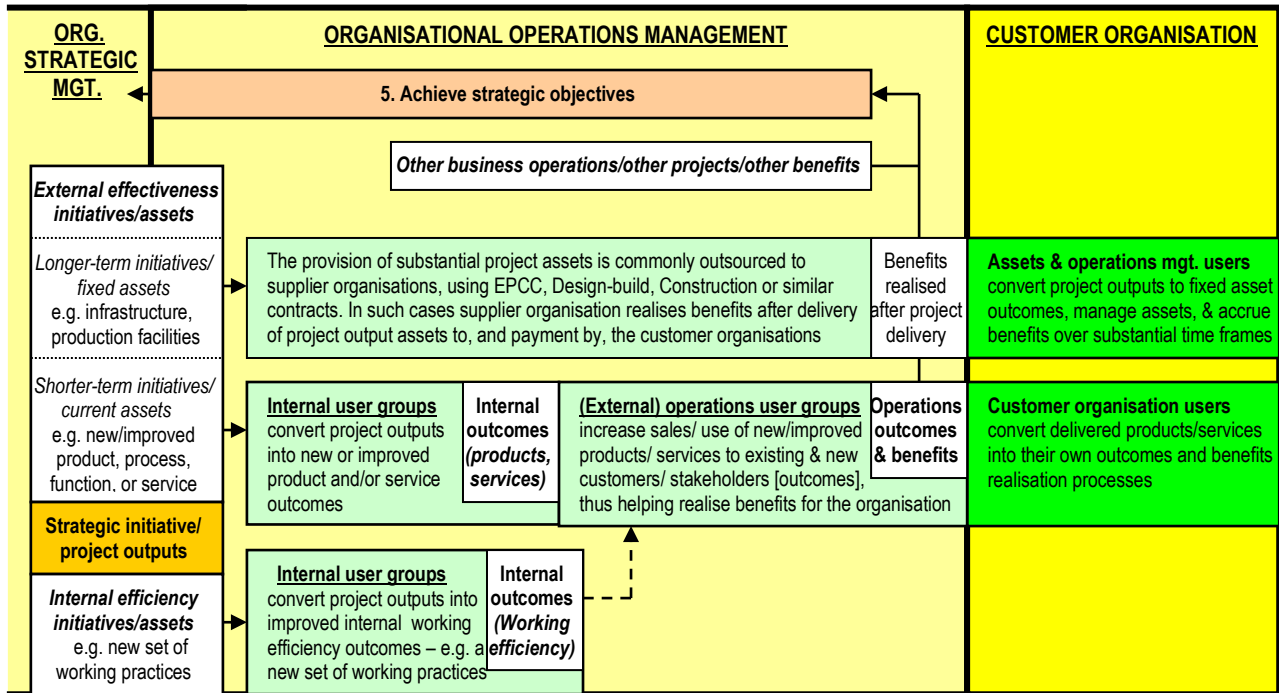
Project management cannot be held accountable for actually realising the benefits from a project, as the delivery team will generally move on when the project is finished. Only the organisation that has the new asset delivered and/or the organisation that subsequently operates it can realise the benefit.

In a more generalised context, Dalcher 2016 says,

....outcomes occur beyond delivery and handover. More critically, benefits accrue over an extended time period as the new or improved asset or system goes into use.

**Cumulated user summaries of all three types of initiatives/assets**

We conclude this segment with the addition of an illustrated summary of the longer-term fixed asset initiatives discussed above to Figure 3-14.



**Figure 3-15. Cumulated user summaries of all three types of initiatives/assets**

**SUMMARY/DISCUSSION OF THIS ARTICLE**

It can be seen that Figure 3-15 also comprises a cumulated user summary covering all three types of strategic initiatives/assets discussed in this article.

In this summary/discussion, it should first be emphasised that this article is essentially an exploratory one – exploring possibilities for specifically including users and user groups in representations of converting project outputs to operational outcomes and the realisation of organisational benefits. Currently this is very poorly covered in the project management literature, where it is all too often implied that project management has a much greater direct involvement in achieving outcomes and realising benefits than it actually has. The latter is in the hands of users of project outputs, and in my opinion the latter should be specifically included in any discussions of achievement of outcomes and benefits to the organisation. This is what I have been trying to provide a skeleton framework for in this exploratory article.

I identified the three broad groups of strategic initiative/project/asset outputs, and discussed the roles of users, and of project management, in converting these to outcomes and benefits for the organisation.

In discussing each of these, I have made choices about prototypical examples to represent each group in more detailed discussions, but am strongly aware that there are many other examples and sub-groups which have not been covered. A particularly prominent example relates to the longer-term asset-related section of Figure 5, whose *International Development* and *Aerospace/Defence* sectors have not been specifically covered in the above discussions.

However, I hope that the skeleton-like framework I have introduced in this article, as summarised in Figure 3-15, might be seen as sufficiently robust to stimulate others to extend the inclusion of users of project outputs in a more comprehensive way, so that the role of users of project outputs can be more strongly represented in the relevant sections of the project management literature, thus reflecting in a more realistic way the realities of practice.

I conclude with a quotation from Dalcher 2015

In an age when the establishment of customer loyalty is crucial to success, reclaiming and repositioning users in projects is essential. The results of projects need to be considered from a wider perspective. Making change stick appears to be a growing organisational challenge; ensuring that users are primed to support and embed change through project delivery will remain a challenge to the profession.

## **SUMMARY/DISCUSSION OF THIS SERIES**

This series has comprised a rather eclectic assemblage of topics regarding project-related contributions to the achievement of organisational objectives. The main common thread is that the focus has been on the latter, rather than on projects per se. This focus is directly related to a shift in the 7<sup>th</sup> edition of PMI's Standard for Project Management and a Guide to the Project Management Body of Knowledge (PMI 2021), which moved from primary concerns with direct governance and management of projects etc., to an enhanced concern with their broader contribution to advancing organisational strategy and the achievement of business objectives. I linked an organisational strategic management model I have been using for some time with a corresponding figure from PMI 2021, and used this as a background for discussions in the first two articles.

The first article looked at some long-existing project-related supplier organisation services to owner organisations in the context of this linked basic strategic management model. It particularly focused on their contributions to the first two stages of this model, which get little coverage in the mainstream project management literature.

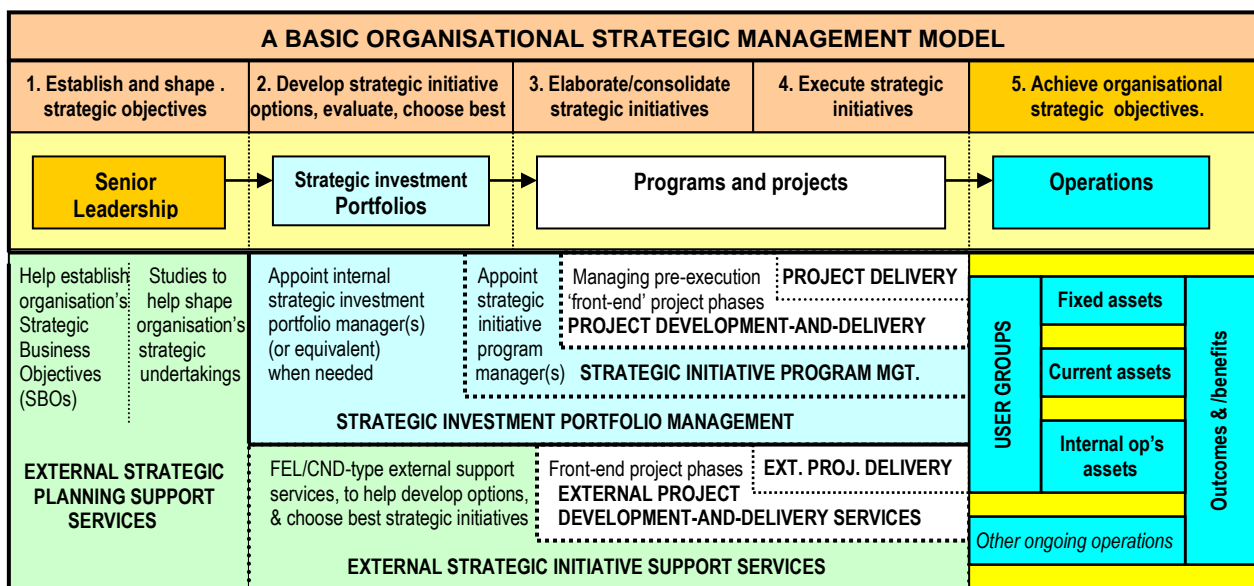
The second article switched to internal arrangements within the owner organisation, and the contributions of portfolio, programs and projects to the context of this linked model. In particular, it focused on the variety of different meaning which are given to each of these three descriptors in the project management world, and suggested



specifically augmented descriptors to better indicate where and how they contribute to organisational strategic and operational management processes.

The third and final article was concerned with the roles and responsibilities of users, and of program/project management (PPM), in converting project outputs to organisational outcomes and benefits. This topic receives scant attention in the project management literature, which also tends to exaggerate the direct influence of program/project management in these contexts. A skeleton framework was developed to facilitate inclusion of users in various contexts in representations of conversions of project outputs to the achievement of outcomes, and the realisation of organisational benefits.

I believe that each of the three individual articles in this series has been reasonably well summarised, and will not attempt an overall descriptive summary here. The third article used a recursive version of the organisational strategic management model as its basis. However, I have notionally brought models from the three articles together in the linear format of the linked model to illustrate some of the key components of this series, as shown below.



**Figure 3-16. A schematic representation of some of the subjects covered in this series**

In Figure 3-16 I have altered the layout of Figure 2-5 in Stretton 2022b (which combines external project-related activities from the first article with internal owner organisation roles in the second article), to put both in the lower sector of the linear model. I have then added a highly compressed representation of Figure 3-15 (borrowed from Stretton 2021, Figure 3) to the Operations sector (Stage 5), to notionally represent this third article in the basic linear formal developed in the first article.

This figure looks somewhat complicated. However, it does broadly illustrate how the three major project-related issues discussed in this series relate to the achievement of

organisational strategic objectives, which has been the major concern of the series. Broadly speaking, the first article was primarily concerned with Stages 1 and 2 of the basic organisational strategic management model, the second with Stages 3 and 4, and the third with Stage 5.

Overall, it is hoped that this series may provide some bases to facilitated further contributions by others towards developing more holistic discussions of how projects and project-related activities contribute to the achievement of organisational strategic objectives, which are being increasingly recognised as key issues to be addressed to help further advance the scope and influence of the project management avocation.

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**Alan Stretton** is one of the pioneers of modern project management. He is currently a member of the Faculty Corps for the University of Management & Technology (UMT), USA. In 2006 he retired from a position as Adjunct Professor of Project Management in the Faculty of Design, Architecture and Building at the University of Technology, Sydney (UTS), Australia, which he joined in 1988 to develop and deliver a Master of Project Management program. Prior to joining UTS, Mr. Stretton worked in the building and construction industries in Australia, New Zealand and the USA for some 38 years, which included the project management of construction, R&D, introduction of information and control systems, internal management education programs and organizational change projects. He has degrees in Civil Engineering (BE, Tasmania) and Mathematics (MA, Oxford), and an honorary PhD in strategy, programme and project management (ESC, Lille, France). Alan was Chairman of the Standards (PMBOK) Committee of the Project Management Institute (PMI®) from late 1989 to

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