

## ***Implementing BS202002: Benefits management on portfolios, programmes and projects***<sup>1</sup>

### **Benefits Maps – The Foundation of Benefits Management**<sup>2</sup>

By Dr. Hugo Minney

United Kingdom

In the realm of project and program management, benefits realization reveals why we are putting in this investment – it's crucial that this is properly documented [1]. At the heart of this discipline lies a powerful tool: the benefits map. This article delves into the various types of benefits maps, their applications, and how they serve as the cornerstone of effective benefits management.

Benefits maps visually represent how various activities, outputs, and outcomes are interconnected, highlighting the causal relationships that drive the realization of benefits. For experienced project management professionals, including project sponsors, the project leadership team, and specialists such as portfolio office benefits managers, understanding and effectively utilizing benefits maps is essential for successful project and program delivery [2-5].

#### **What is a Project or Programme Benefits Map?**

A benefits map is a visual representation that illustrates the *causal* relationships between each project activity (the “work”) and the organization’s strategic objectives. It serves as a roadmap, guiding stakeholders through the journey from project inception to the realization of tangible benefits, and shining like a lighthouse to keep the project team moving towards their destination and away from the rocks.

#### **Key Principles: Causality, Materiality, and Clarity**

When crafting a benefits map, three fundamental principles must be observed:

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<sup>1</sup>The author Dr. Hugo Minney is a Fellow of APM (Association for Project Management), a Member of PMI and PMI UK, Co-Chair of APM's Benefits and Value SIG, and committee member of PMI UK's Sustainability Community of Action. For more, see his author profile at the end of this article

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1. **Causality:** Each element in the map should have a clear, logical connection to the next. The notorious "and then a miracle occurs" approach has no place in a well-constructed benefits map [6-9]. This applies both ways – it should be clear why a particular outcome is needed to realize a benefit, and a particular activity to bring about that outcome; and the activities should clearly lead to the outcomes and outcomes should contribute towards realizing benefits.
2. **Materiality:** Only significant, relevant connections should be included. Avoid the temptation to link everything to everything else, as this dilutes the map's effectiveness [9, 10]. Any contribution that is less than “measurable” should not be on the map. And any orphans and widows – activities that don’t clearly contribute to an outcome or benefits that have nothing going on to realise them – should be cause for concern.
3. **Clarity:** The map should be visually intuitive, allowing stakeholders to grasp the relationships at a glance [11]. This will depend on your audience – some people want all their questions answered, some want a map as simple as it possibly can be [12].
4. **Living document:** The map is a living document that should be kept updated as the project progresses. When a milestone is achieved on time, this increases confidence in the realization of benefits, and the increased confidence should be reflected in the benefits map. And during delivery/ adoption and after handover, benefits and dis-benefits often emerge and should be documented on the map(s).

### Three Types of Project/Programme Benefits Maps in BS202002

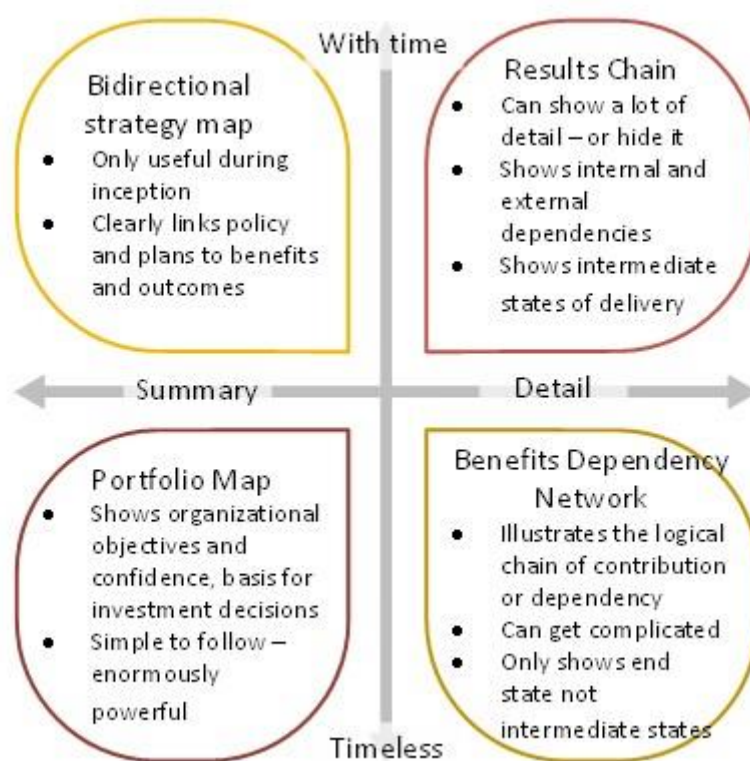
The British Standard BS202002 outlines three primary types of benefits maps [9]:

1. Results Chain
2. Benefits Dependency Network (BDN)
3. Bidirectional Strategy Map

Each type has its unique advantages and disadvantages, which we'll explore in detail. See Figure 1 for characteristics.

### Portfolio Benefits Mapping

In addition to these three types, portfolio mapping offers a broader perspective, allowing organizations to visualize benefits across multiple projects and programs [9, 13].



*Figure 1 Types of Benefits Maps*

## Results Chain

The Results Chain Benefits Map is a linear representation of how project activities lead to outcomes and, ultimately, to strategic benefits<sup>[14]</sup>. Note that the term “results chain” and similar terms such as “logic chain” have been used with other meanings since John Thorp’s book “The Information Paradox” <sup>[14]</sup> which introduced the Results Chain benefits map. We use it here in line with its first use. See Figure 2.

### Key Components

Results chain benefits maps (“results chain”) are deceptive in their simplicity; they contain few different types of components, and the maps themselves can contain more white space and fewer crossed lines than a Benefits Dependency Network – but there’s a wealth of detail on display.

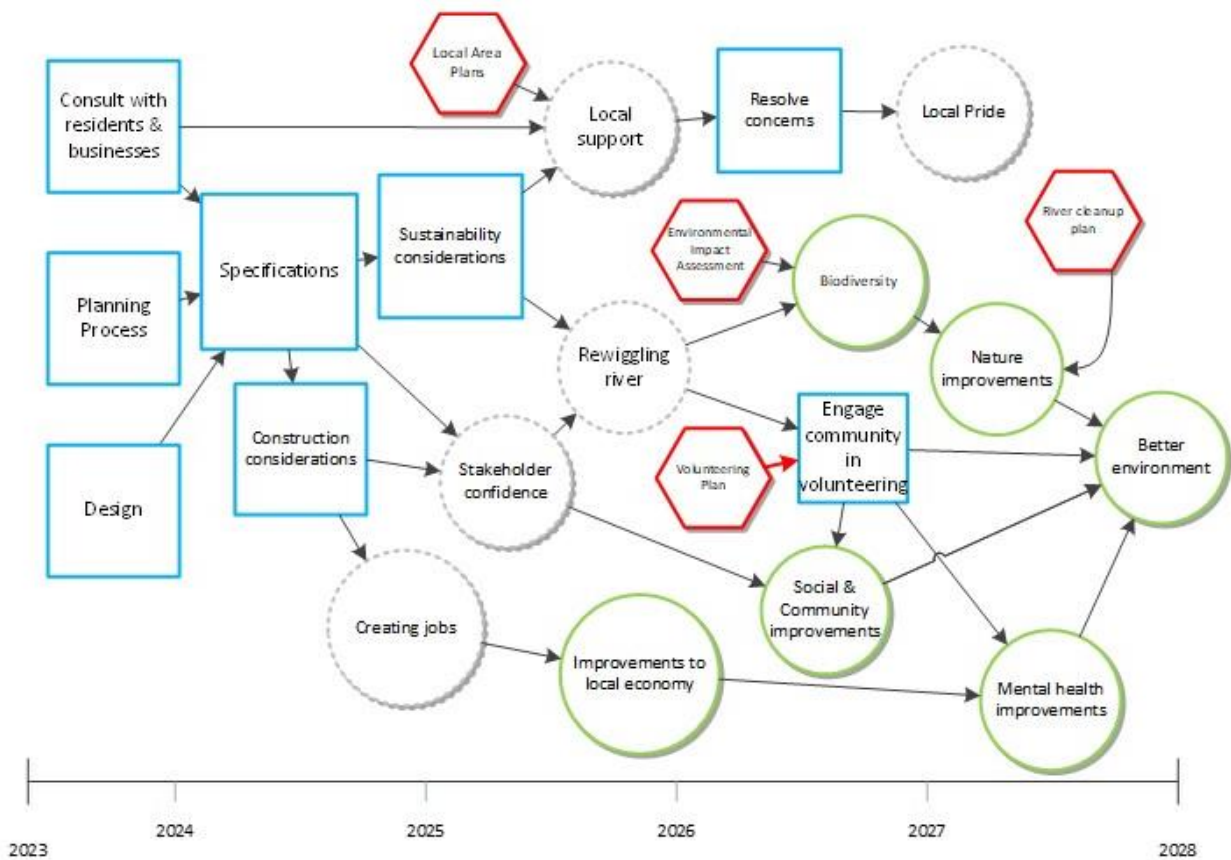
The four components of a results chain are:

- A) Activities: usually drawn as squares with the title inside in the text. The term “activities” includes enablers, work, and outputs (milestones)
- B) Outcomes: usually drawn as circles. The circles can represent interim outcomes and final outcomes, and the term “outcomes” includes benefits and objectives. This is

particularly useful where a project has to deliver useable interim status rather than shutting down an important function of the organization.

- C) Dependencies: drawn as hexagons, illustrate off-map (or outside the project) dependencies in both directions – both those where the subsequent outcome is unlikely to be successful without this external deliverable and where another project or change in the organization has a critical dependency on a deliverable (either activity or outcome) from this project. Dependencies require that something exists (an output or an outcome) before the next thing can occur.
- D) Assumptions: also drawn as hexagons because these are also external dependencies, although in this case, they aren't deliverables from other change work going on, but rather assumptions that the organization hasn't changed or that a particular dependency is actually reliable. Assumptions are the conditions that must be true for the results chain to hold, and these need to be explicitly stated and monitored throughout the project or programme.

In the real world, an activity produces an outcome, which in turn is the basis for the next activity. This is easily illustrated on a results chain.



*Figure 2 Results chain example for rewilding*

## Time Dimension

One of the strengths of the Results Chain is its ability to incorporate a time dimension. Since activities and outcomes flow from left to right in the results chain map (because, naturally, one follows the other), the addition of a timeline at the bottom of the map allows the project leadership team to place activities and outcomes (and dependencies and assumptions) in the correct left-right position for the date and time they should happen. It isn't a Gantt chart since the size of the map object remains the same and only illustrates the start of the activity or outcome, but it immediately illustrates when an activity needs to happen, how long the time lapses before the benefit, and when the measurements of benefit are expected[9].

## Fractal Nature

Results Chains can be viewed with different levels of detail on the page. Each activity can be drawn as a complete map in itself, and an individual project or task team can use their own section of the results chain as their guide. Outcomes can be expanded into multiple components (e.g., a change in the operations of the organization and corresponding benefit(s)). This has informed the treatment of benefits in Benefits Dependency Networks. Results chain is highly adaptable to different stakeholder needs [15].

## Identifying Benefits

The process of creating a Results Chain often leads to the discovery of previously unrecognised benefits, which means the additional benefits can form part of the business case and be part of the monitoring process during delivery, in contrast to the same benefits emerging during project delivery and altering the business case at a later stage [16-18].

## Interim Benefits

As projects progress, the timeline supports the evidence of whether benefits are being delivered and realised to the extent, and at the time, planned. This supports decisions to speed up/ slow down/ change aspects of the project (but see also portfolio maps). The results chain supports interim project delivery states as well as end states and therefore it supports genuine interim benefits, and obsolete benefits can be discarded or replaced [18].

## Benefits Dependency Network (BDN)

The Benefits Dependency Network (“BDN”) illustrates the contribution of activities (projects or tasks) to the strategic objectives and benefits of a programme[19-23]. The BDN represents an overall view of a project or programme, with the end state and overall benefits at the future end of the timeline, and enablers and activities (projects and tasks, “work”) at the start of the timeline. BDNs can be drawn either with the objectives or drivers at the left hand of the page showing how the activities were derived, or with the objectives and benefits at the right hand of the page and the work at the left[24].

A BDN consists of columns of a type of map component, and their relationship to the map components in the next column. See Figure 3.

Many organizations and individual advisors have their own preferred approaches to BDNs. The British standard emphasises that BDNs will be compliant regardless of the columns used, as long as key concepts are retained.

## Key Concepts

A BDN needs to have:

- Columns each with a type of map component in that column. These must include:
  - benefits and/or objectives (which might or might not include the organization’s objectives that the project’s objectives contribute to)
  - the change(s) of state of the organization which ensures that benefits are more likely to be realized (the “outcomes”)
  - work or the actions that are being taken to bring about those outcomes, consolidated to a greater or lesser extent
- Links between map items (benefits, outcomes, work) to show which work contributes to which outcomes and which outcomes contribute to which benefits, or the dependency relationship

A BDN might also have [20, 25-27]:

- Different names for the columns listed above as long as they include these basic concepts
- Additional columns such as enablers, drivers, outputs, strategic objectives
- Different weightings to the links between one column and the next, for example
  - critical contribution link (the benefit will not be realized without this outcome or change in the operations of the organization, regardless of other contributions)
  - substantial (once the critical component(s) are in place then this change makes a big difference which depends on how much of this change is in place)
  - measurable (it is possible to measure the amount of additional benefit realized by this component)
  - anything less than measurable should not be drawn on the map (for the purposes of clarity)
- map items within a column might be consolidated by similarity to reduce the amount of information that a glance at the map has to take in
- map items might be arranged strictly within vertical columns, or work could lead to other work and “interim benefits” could lead to “summary benefits”

It is not unusual to have BDNs drawn to different levels of detail and with different emphasis for different audiences, for example for the steering group versus the team working on a component of work.

## Running a BDN Workshop

Creating a BDN should (always) be a collaborative process. Key steps include:

1. Identifying and inviting stakeholders
2. Engaging participants in the mapping process
3. Processing and consolidating inputs
4. Documenting the final map
5. Keeping records for future reference [28]

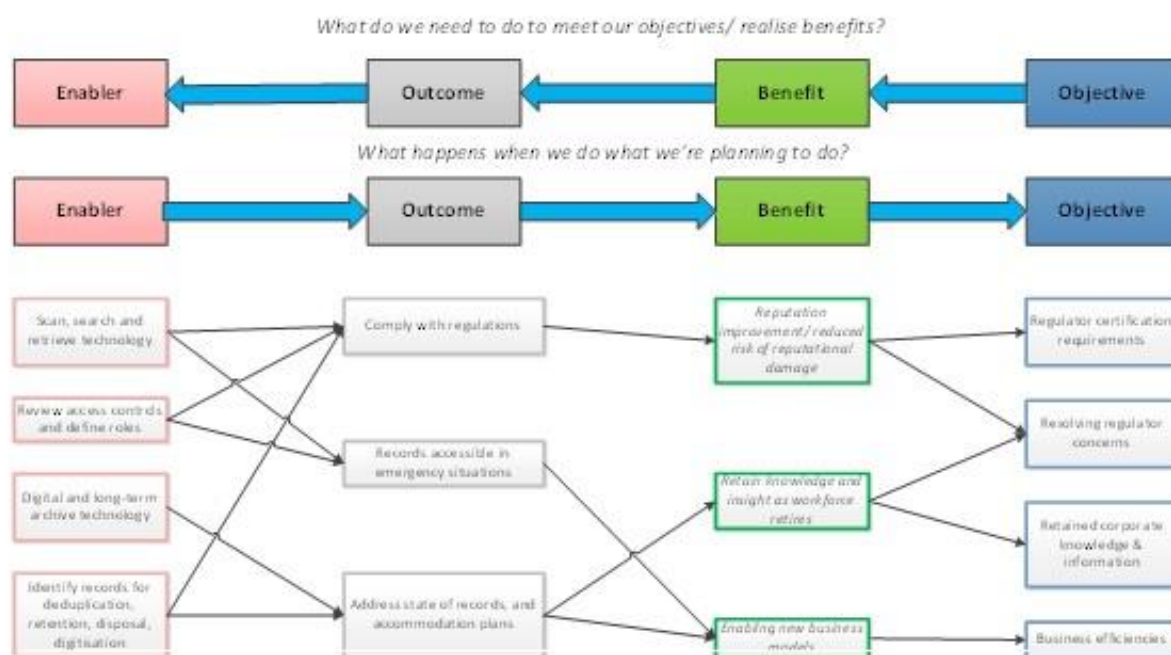


Figure 3 BDN for digitising records

## Considerations and what could go wrong

**Stakeholder involvement:** It's very common that a benefits manager or business change manager creates a benefits map to justify a decision already taken, without input from stakeholders. This is a mistake on two counts:

1. Are the benefits real benefits and do they have anything to do with the project? Benefits are only benefits because the stakeholders say they are and put a value on them. If stakeholders weren't involved, then who decides what the benefits are?
2. Projects require investment, whether it's investment of money or time or anything else. That means that the investment is not available to something else. Someone needs to challenge each investment decision, and benefits management is a formal process to enable this challenge.

**Too much detail:** project people nearly always want to show everyone how busy they are, regardless of whether it helps communication or hinders it. There's a danger that the benefits map contains too much detail which makes it impossible to see what's going on. The Results Chain is self-clarifying in that it's normal to consolidate or expand the detail to keep the map clear, but with BDN the facilitator (and it is a facilitator, documenting what the stakeholders tell you and making some executive decisions) needs to be a bit more active in consolidating for clarity.

**External dependencies:** The BDN is not good at showing either external dependencies, or the time criticality of anything. It's a great tool for some purposes but not all.

## Bidirectional Strategy Map

The Bidirectional Strategy Map, as the name implies, is useful at the strategic planning stage to ensure that the actions proposed to deliver the strategy will ultimately lead to outcomes that realize the benefits originally required by the strategy[29, 30].

A Bidirectional strategy map is an Investment Logic Map[31-34] put onto the front of a Benefits Dependency Network, or the result of taking a Right to Left BDN and adding a Left to Right BDN (see MSP v5 pg 75 [24]).

### Limitations and advantages

The primary limitation of this approach is its simplified view of complex relationships, which may not capture all nuances of a project [35]. However this means that it fits a lot on a page, making it particularly useful for executive-level discussions [36].

The bidirectional strategy map contains the Investment Logic Mapping which is only really useful during the concept phase of project planning. That means that a live bidirectional strategy map will have nearly half the map never changing, which is a waste of screen or paper. It should probably only be used during the concept phase, and one or both of the other project and programme map types used thereafter.

### Shape and Flexibility

While typically structured with one (or very few) map item in each column, Bidirectional Strategy Maps can be drawn in the shape of a "V" so that the mapping across from requirements to outcomes and from policy objectives to benefits is more obvious. See Figures 4 and 5.



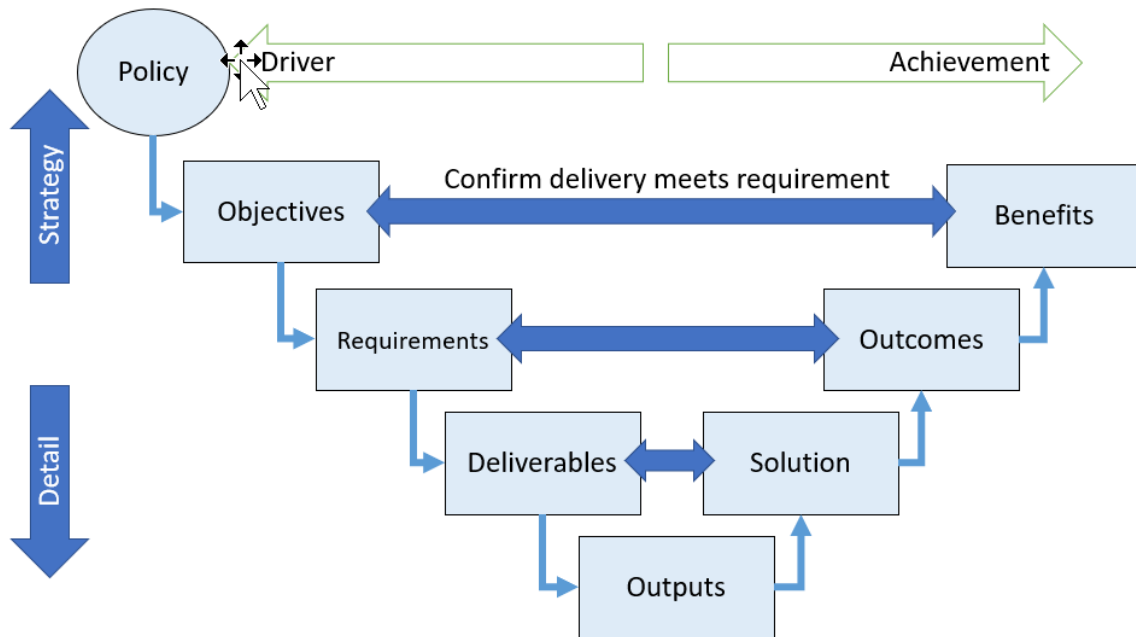


Figure 4 Bidirectional benefits map conceptual - V-shaped

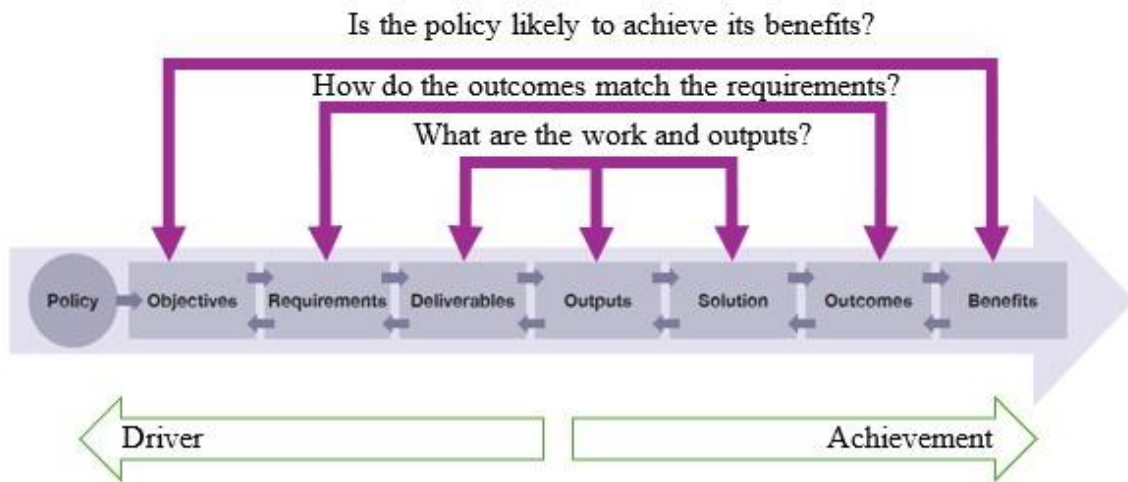


Figure 5 Bidirectional benefits map conceptual - horizontal

## Portfolio Benefits Map (Matrix)

For organizations managing multiple projects and programs, a Portfolio Benefits Map offers a comprehensive view of benefits across the entire portfolio[2], see Figure 6. You might not have your change projects organized into a portfolio, in which case just use the organization’s objectives (pus KPIs), or you might have multiple portfolios (which typically include business operations) when you need to ensure that the portfolio objectives can be mapped onto the organization’s objectives.

	Business Process efficiency	Security and Access	Regulatory compliance	Collaboration & communication	Foundations for the future
Digitising records	X		X		X
Indexing and tagging records			X		X
Cyber security enhancements		X			
Evergreen	X				X
Convergence on systems architecture			X		X
HR Self Service	X				
Process Automation	X		X		X

Figure 6 Portfolio benefits map - ICT portfolio

### Quick Start

Creating a Portfolio Benefits Map begins with listing all projects/programmes on one axis and all strategic objectives on the other, forming a matrix. The cells in the matrix contain the specific benefits from that project or programme (horizontal axis), that align with the portfolio strategic objectives. A variation on this is where the portfolio or organization has defined its benefits, in which case use these instead of the objectives.

Each portfolio objective or benefit should have an expected value assigned (and ideally, a time profile for amount). These amounts can be in economic terms, but also in environmental, social and/or human terms. The author finds that the four “common currencies” that work in a lot of situations are: Financial to the organization (P&L \$); Financial outside the organization (Social Value \$ or SV \$); Accelerating the mission (completing a strategic objective months or years earlier than expected); and Reputation (a catch-all for everything left over including environmental, human, community that aren’t already covered by SV \$)[37, 38].

Each cell in the matrix can then have a value or profile of values over time representing the contribution of each project to that specific objective. This allows for quantitative analysis of

the portfolio's alignment with strategic goals – do the current forecast benefits from the projects add up to sufficient for the strategic objectives (or strategic benefits) or not? [39].

## Gaps vs. Excesses

The matrix format easily highlights areas where strategic objectives lack project support (gaps) and where multiple projects may be pursuing similar benefits (excesses) [40]. On one hand, it's a good thing to overperform; on the other, any gaps either now or in the future require decisions to reallocate resources, and resources could be taken from the projects delivering excesses. This ensures a balanced scorecard of different benefits rather than a focus on financial, for example [41, 42].

## Additional Considerations

- **Continuous refinement:** Benefits maps should be reviewed and updated regularly as the project progresses to reflect changes in scope, risks, or assumptions.
- **Stakeholder engagement:** Involve stakeholders throughout the creation and maintenance of benefits maps to ensure alignment and buy-in.
- **Integration with other project management tools:** Integrate benefits maps with other project management tools, such as project charters, work breakdown structures, and risk management plans.
- **Quantification, progress and other details:** It's possible to show other information on a benefits map. This could include the quantity of contribution from one step to the next [43], % complete of each map item, amount in common currency, type or categorisation, and so on. Maps are supposed to bring clarity so facilitators drawing maps should consider their audience and whether additional information will be useful or confusing.

By following these guidelines and leveraging the power of benefits maps, project managers can increase the likelihood of successful project outcomes and maximize the realization of intended benefits.

## Recap

Benefits maps serve as the foundation of effective benefits management by:

1. Visualizing the path from project activities to strategic objectives
2. Identifying key measurement points and dependencies
3. Facilitating stakeholder communication and buy-in
4. Enabling portfolio-level analysis and optimization

By mastering the various types of benefits maps – Results Chains, Benefits Dependency Networks, Bidirectional Strategy Maps, and Portfolio Maps – P3 managers (project program and portfolio managers) can significantly enhance their ability to deliver and demonstrate value to their organizations.

As the project management landscape continues to evolve, the importance of robust benefits management practices will only grow. Benefits maps, in their various forms, will remain an indispensable tool for navigating this complex terrain.

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## About the Author



### **Dr Hugo Minney**

London, UK



**Dr. Hugo Minney** is a Fellow of APM (Association for Project Management), a Member of PMI and PMI UK, Lead of APM's Benefits and Value IN (Interest Network) and Sustainability IN, and committee member of PMI UK's Sustainability Community of Action (none of which are paid).

Minney has analysed the benefits of change, and weighed them up against the need for effective operations to keep the lights on, since 1990 when he started supplying high ticket computer systems and specialist software for workforce planning; he has built business cases of all types and is acutely aware of the pressures to make a single project a success at the expense of the organization's objectives until he was a board director in National Health Service and could take a portfolio overview. Minney is now a project management consultant with a sideline chairing a charity restoring the sense of community for young people.

Minney works in project management, and in particular benefits management, motivating team members by reporting what they are achieving together and changing the community and culture to want to achieve – together. At present, he's more involved on the governance side, accredited as a Social Value practitioner and



Chartered Project Professional, and reviewing the balance of projects and contribution to objectives and benefits across portfolios.

Dr. Minney can be contacted at [hugo.minney@thesocialreturnco.org](mailto:hugo.minney@thesocialreturnco.org)