Implementing BS202002: Benefits management on portfolios, programmes and projects [1]

Benefits Mapping Workshops – Inspiring and Engaging our Stakeholders[2]

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In the realm of project management, the ability to clearly articulate and visualize the benefits of a project is crucial for success. Benefits mapping (see last month https://pmworldlibrary.net/article/benefits-maps-the-foundation-of-benefits-management/ [1])

Figure 1 Benefits mapping in person has advantages and disadvantages

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is a powerful communications tool, but the process of developing the benefits map is even more powerful.

Benefits mapping workshops foster collaboration, stakeholder engagement, and the inspiration and evangelism that overcomes many of the obstacles to successful implementation. This article delves into the intricacies of planning and executing effective benefits mapping workshops, providing insights for experienced project management professionals, including project sponsors, leadership teams, and specialists such as portfolio office benefits managers.

The Importance of Collaborative Benefits Mapping

Creating a benefits map is inherently a group activity (see Figure 1). While it may be tempting to have a few conversations and then retreat to draft a benefits map in isolation, this approach often falls short. As noted by the Project Management Institute (PMI), "Stakeholder engagement proactively advances value delivery" [2]. Not involving the people affected by the changes, whether the customer (who pays for the change) or the user (who has to change their processes and behaviours as a result of the change), might make the planning stage shorter but is likely to make the delivery change much longer, miss out on realizing benefits, and fail to uncover dis-benefits and create rework later in the project lifecycle.

"benefits mapping is not just about creating a visual representation; it's about creating a shared understanding and commitment to realizing benefits" [3].

The collaborative approach ensures that diverse perspectives are considered, potential challenges are identified early, and stakeholders feel a sense of ownership in the project's outcomes. This means that:

- different investments can be compared and prioritised against each other – the right things get done;
- the opportunities and risks can be identified and planned for before the project plan is set in concrete – the right things are done in the right way;
- there's a pull to implement the changes rather than resistance to maintain the status quo – the right things happen;
- when investment is challenged, the project has its supporters to help defend the resources committed.

Workshop Duration and Frequency

Very few people organise their thoughts when the information is flying thick and fast. This applies even more in any group work than in report writing to a defined format. It's also difficult to get everyone who should be at a workshop into the same workshop at the same time, and where we have representatives who represent groups of stakeholders (see Figure 2), they will need to know what the questions are (mainly ideas that come out of the group conversations, rather than questions that can be defined beforehand) and consult.

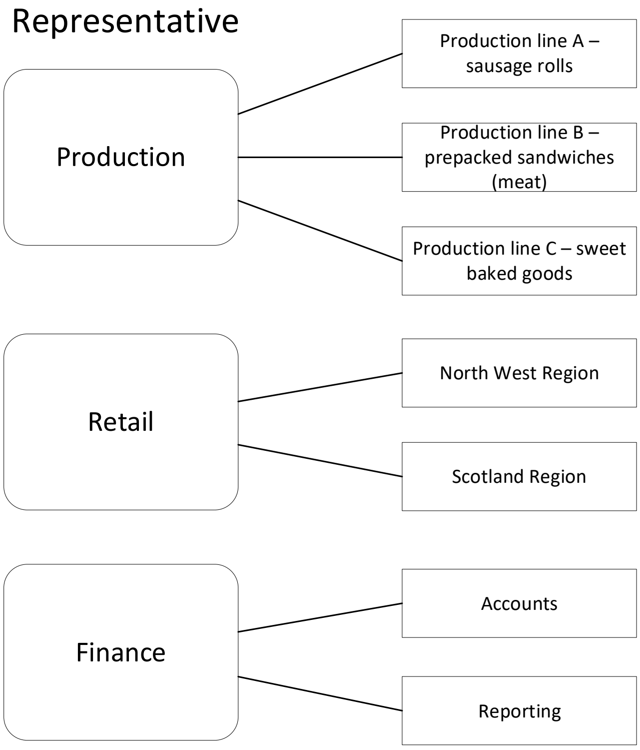

Figure 2 It is often useful to identify representatives of groups of stakeholders

Therefore it's usually better to have multiple short workshops with a gap between them so that representatives can consult their stakeholder groups[4], people can collect information and check statistics, and there's time to think about and revise one's thoughts, than a single intensive workshop. I have had to deliver a benefits mapping workshop in 25 minutes, because the chief executives of the organizations I needed to talk to were in a 2 hour meeting and that was the only time I could get, but having done the initial workshop they were then happy to allocate representatives to complete the process. The optimal approach probably involves a series of three 90-minute to 2-hour workshops, spaced at least 6 weeks apart, with the same stakeholders attending each session.

Remember to validate the map at the next workshop[5] and ensure it is compliant with, and ultimately integrated into, project plans[6]; and assign activity to participants and expected participants between workshops.

In any case a workshop should start with confirming the objectives or goals (and if people have second thoughts and want to change them, then agreeing revised objectives and goals):

WORKSHOP 1

Create a board for people to add only the rightmost (most strategic) columns of a traditional BDN (see Figure 1):

- objectives / goals (make sure these align to the organization's or alliance of organizations' strategic objectives)
- outcomes – what needs to change
- benefits – what the outcomes lead to and how it contributes to the objectives

Do each section of the map in the order above (ie not right to left), and encourage participants to put up sticky notes or electronic sticky notes with their thoughts and ideas, then get people to read everything on the board and cluster them into similar themes. KEEP ALL THE NOTES IN EACH CLUSTER. Ideally participants should put their names and stakeholder group on each note they add, so you can make sense of them afterwards.

As facilitator, don't be afraid to say "that isn't a benefit it's an output" or whatever. However do so after the ideas have poured out, don't break the creative process.

A suitable timetable for a 90 minute workshop is (I've added McCarthy's 4Mat[3] to help explain the theme for each section[7]):

Table 1 suitable agenda for benefits mapping workshop 1

Time	Activities
5 minutes	What is a benefits map and why is it useful (WHY)
10 minutes	Welcome, preferably given by the most senior person in the room or sponsor (WHAT)
10 minutes	Defining the problem and the benefits mapping process
15 minutes	Objectives and/or goals (treat them as the same). Get them all (and any additional ones) on the board without criticism but be prepared to give advice. If participants want to use the published objectives then ask "is that all?". Talk about alignment to Strategic Objectives. The first column (objectives/goals) gets a longer time allowed because people need to become familiar with the process
10 minutes	Cluster the objectives. If there are arguments then referee. Talk about "objectives" which we (the experienced facilitator, other experienced participants) don't think are objectives, and move them to where everyone agrees. Don't worry – if they won't move things this first workshop then they

[3] McCarthy's 4Mat system was designed for primary school age children. Which makes it ideal for busy executives. There are some minor changes when working with adults, such as to never explicitly ask people WHAT IF (great for children, kills the creative process for adults), but it's basically the same

Time	Activities
	probably will on reconsideration in a later workshop – this is their map so don't force the issue.
5 minutes	BREAK – everyone needs a break but make sure people are back on time. Ideally ensure both hot and cold drinks are available in the room so people can carry on thinking and reading the sticky notes.
10 minutes	Next column to work on: Outcomes; how will the processes and behaviours in the organization need to change in order to deliver those outcomes? Accept all ideas and get them recorded (different stakeholders or different departments will need to change in different ways)
5 minutes	Cluster the outcomes. Some outcomes might actually be outputs – put them in an "outputs" space (which might be a separate board or box) for further work in a later workshop
10 minutes	Benefits: expect to talk about what makes a good benefit, and ideally have some benefits prepared that you (the facilitator) can propose. Expect people to suggest "benefits" that are actually outcomes or outputs, and also expect "benefits" that will make good lead measures for the real benefits. Let them go on the board – move them during the Cluster stage. Start the conversation about quantity and how to measure them.
5 minutes	Cluster the benefits: by this time people should want to add their benefits to the most appropriate cluster instead of just putting them up at random.
5 minutes	Explain what happens between this workshop and the next workshop – the facilitator will draw up the map electronically (or tidy it if it's on the cloud) and participants should share with their stakeholders and think about it.

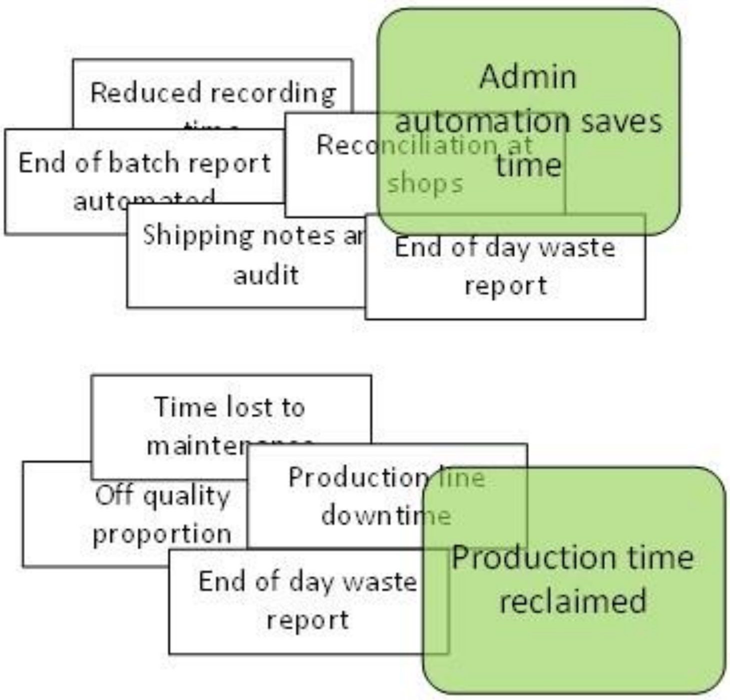

Figure 3 Cluster similar benefits (or objectives or outcomes) for clarity, but keep the details

WORKSHOP 2

The aims of workshop 2 are to:

- Confirm or revise the outputs from Workshop 1 – participants should have socialised the full outputs (not just their own contribution) to the stakeholders they represent, asked for changes, and done some research of their own such as checking facts on the ground, during the intervening period)
- Draw linking lines to show how Outcomes lead to Benefits and Benefits bring about Objectives.
- Introduce the idea of measuring quantities of benefits – both lag measures (how much benefit or disbenefit has actually been realised – typically after handover to business operations) and lead measures (how do we know we're going in the right direction). Introduce whether there is enough change (in the Outcomes column) to realise the benefits to the extent needed, and enough Benefits to bring about the objectives. Plant the seed, don't labour it.
- Add the Outputs and Activities columns to the mapping space – what does the organization (and in particular the project team) need to do in order to bring about the change (the Outcomes)

Table 2 suitable agenda for benefits mapping workshop 2

Time	Activities
5 minutes	Welcome back, preferably given by the most senior person in the room or sponsor
10 minutes	Recap on the last workshop and how people felt (everyone is invited to contribute)
20 minutes	Participants/ representatives feed back about the conversations they had with stakeholders and what revisions they want to see. Start making revisions after half the participants have spoken, rather than moving things around the moment the first person suggests a change
10 minutes	Explain the Chain of Causality (Outcomes, Benefits, Objectives) – note that causality at this level is probably unfamiliar to participants, they will be more likely to understand causality from Activities to Outputs to Outcomes. Draw lines to show causality. Explain the difference between "critical" (required before the next thing can happen at all, but might or might not make a big quantity of difference), "major" (makes a big difference to the next thing), "minor" (makes a measurable difference) and everything else (anything less than measurable) which shouldn't get a connection drawn at all. Agree the connections – which ones stay on the map and what type they are.
2 minutes	Introduce the second half of this workshop: Outputs and Actions (and any other columns leading up to Outcomes that your organization likes to include)
8 minutes	BREAK – this break is likely to involve more conversation about what is to come and what was discussed than the break during Workshop 1

Time	Activities
15 minutes	Sticky note time again, this time for Outputs and Activities. Allow a free-for-all – the engineers will want to put up every little thing to show how busy they are. Start the clustering process about 5 minutes from the end of this time.
5 minutes	Chain of causality to show how Activities result in Outputs, and outputs lead to Outcomes. Get a conversation going about quantities – is there sufficient activity to bring about the Output; is there sufficient Output to ensure the Outcome? What's missing? It might not be part of the project scope, but it needs to be recorded somewhere and allocated to someone to ensure it happens.
10 minutes	Quantities for Outcomes, Benefits and Objectives. Now that the participants have looked at quantity for the areas they are familiar with (activities and outputs), throw in the challenge. What changes? By how much? How would you measure that? How would you know you are going in the right direction?
5 minutes	How do people feel about the workshop they've just participated in? What needs to be done before the next workshop? The next workshop is on benefit profiles which involves knowing how much? .. of just about everything.

As with the previous workshop, during the time between workshops, participants should talk to their management and colleagues, to other stakeholders they represent, and collect data to check the logic of the map and prepare to challenge and revise it.

WORKSHOP 3

By this point, we have a fully-fledged benefits dependency network. Not only is it a useful tool to use for communication (the benefits manager should aim to have no more than 8 and preferably half that number of summary items in any one column, and the causal chain linking one column to the next or the one before should be clear and not like a spider's web or cat's cradle), but we also have a wealth of detail underpinning the map, with all of the individual sticky notes that contribute to each summary item.

The aim of this workshop is to ratify the benefits map and start to put flesh on the bones in the form of building benefit profiles.

The benefits map will be a living document, updated throughout the life of the project as decisions are made which change the activities and outputs, because changes to activities and outputs change the outcomes for the organization (what processes and behaviours are changed, and in what ways). This will affect the likelihood and quantity of the benefits, which then feeds into the steering group and investment board. As a result of these changes, the investment board might change the scope and specification of the project to recover benefits or change resources allocation.

However, the steering group and investment board want to know "how much?"; they invested an amount of money and other resources, they want to know the return on investment (ROI). This means that we need to quantify the benefits in one unit or another, assign owners, and plan the activities needed in addition to what's in project scope to make the benefits happen (realise them) and to manage and mitigate dis-benefits.

That's what this workshop is about.

Table 3 suitable agenda for benefits mapping workshop 3

Time	Activities
15 minutes	Welcome back – project sponsor to remind attendees of the importance of ROI, recap the previous two workshops (including how people felt – see last section of Workshop 2), and describe what's expected from this workshop and who it goes to
10 minutes	Everyone should review the map from previous workshop and advise of all suggestions for change, whether from stakeholders or on reflection.
15 minutes	Agree changes needed to the benefits map, agree benefits map and send to steering board for signoff. The benefits map should be clear, with individual activities/ outputs/ outcomes/ benefits/ objectives summarised into between 1 and 8 per column, chain of causality clearly defined, and the alignment of the project's objectives or benefits with the organization's strategic objectives or strategic benefits should be described (although this last might be on another document, for example in the form of a matrix).
5 minutes	Facilitator explains the benefit profile – this should also be available as a handout or poster for reading during the break: • Benefit owner – representative of the business who has an interest in gaining the benefit being defined. Defaults to project sponsor if no-one else identified (does NOT default to anyone in the project team) so the sponsor can find a more suitable owner; • Benefit description – needs enough detail that it can be understood by someone who doesn't know about the project – the title is often too brief; • Amounts, timetable, milestones ("this much" realised by "this date"), activities and outcomes (both within project scope and outside of project scope) required to realise the benefit and their impact on quantity; • Risks to benefit realisation (assuming the project runs smoothly – project risks should be captured in the project plan and any identified during this workshop should be added to the project plan); • Measures – lag measures are realisation of the benefit, lead measures indicate confidence that the benefits will be realised to the planned extent or adjustments to planned benefits
10 minutes	BREAK – in part to raise any concerns about the benefits map which is going for signoff, also to digest the contents of a benefit profile
5 minutes	Split the participants into the same number of teams as there are benefits, minimum 3 per team. If there aren't enough participants then do half the benefits and split into teams. As a group (ie in teams but before the teams go to work separately), identify the benefit owner for each benefit. There might be two – a senior person who is

Time	Activities
	accountable, and someone responsible for making the benefit happen and reporting on its realization.
20 minutes	Complete a benefit profile for each benefit. Use the detailed information (individual sticky notes) to identify the component benefits which make up the summary benefit, and complete all parts of the profile. Do not spend time on the benefit description – just bullet points. Facilitator should make ourselves available to answer questions and visit each team to cajole and encourage. If there are more benefits then there are teams, then each team just does one benefit and we'll pick up the other ones outside of the workshops.
10 minutes	Recap on the benefits management process and issues arising when completing benefit profiles. Consider what happens next.

The benefit description for each benefit can be completed by the Business Change Manager (BCM) or project team using the notes provided. If the benefit profiles aren't complete or only some of the benefits have a profile (there weren't enough participants to complete them all) then small groups should arrange to complete them. Benefit profiles are live documents which update as project milestones are reached, and the lead measures update with every reporting cycle and should report back to the steering board and portfolio investment board with the latest forecast of each of the benefits.

Preparing for a Benefits Mapping Workshop

Thorough preparation is key to running a successful benefits mapping workshop. Consider the following steps:

1. Identify Key Stakeholders

Start by identifying as many stakeholders as possible, and working with the first group of stakeholders, seek to identify more. Group them by type (interest and influence) [8], and prioritise to identify the key groups. Find representatives – people with experience and who are respected by the stakeholders they represent. Experience provides diverse perspectives on potential benefits; respect ensures that the stakeholders feel heard and engaged and are likely to champion the changes. Prioritise diversity – diversity of representation and experience [9].

2. Gather Relevant Documents

As facilitator, we need to have enough knowledge of the requirement to guide the conversations, and we also want to direct participants about what's important. To achieve both of these aims, collect strategic plans, project charters, and existing performance metrics, and preferably ask the participants to provide their own records (if everyone wants to send in the same organizational strategy document, it means they realise that it's important so politely thank them). As APM's Body of knowledge puts it, "benefits should be aligned with organizational strategic objectives" [10].

Existing planning work might need revision, but it shows respect to start from that position, and it also ensures that if the group agree on different objectives/ benefits/ outcomes, they did so from an informed position – otherwise the executive is likely to overrule the results of the workshop to go back to the official position.

As facilitator, we can fill a silence at the start by posting up the official or previously determined information. There are many advantages in gathering existing information, and very few for "a fresh start".

3. Define Clear Objectives

Establish what you hope to achieve through the benefits mapping exercise and communicate this to participants[11]. This needs to be repeated throughout the process, which is why each workshop needs to start with a welcome and recap on the objectives.

4. Choose an Appropriate Venue

Select a space conducive to collaborative work, with ample room for visual aids and group discussions. This can be in person (the limitations on an in-person workshop are to do with travel time and space, however there are substantial advantages in having everyone in the same room able to read each other's body language and interact in smaller groups at will) [12]; or online using a collaboration solution such as Miro or Mural.

Choose a time when people are fresh and undistracted. This will vary by organization – some prefer first thing before people have read their emails, others prefer that people have settled their urgent actions for the day.

Running an Effective Workshop

When conducting any sort of workshop, consider the following best practices:

1. Start with the End in Mind

Begin by identifying the ultimate strategic objectives or desired outcomes from the workshop (at a meta level) and the ultimate aims of the project (the organization's objectives). This approach aligns with the "golden circle" concept popularized by Simon Sinek and Bernice McCarthy, which emphasizes starting with the "why" before moving to the "how" and "what" [7, 13, 14].

2. Work Backwards

From the objectives, identify the benefits that contribute to them, then the changes needed to realize those benefits, and finally the enablers required to implement those changes. This reverse engineering approach, sometimes referred to as "backcasting" [15] although it is also illustrated in MSP (v5 on page 75 [16]).

3. Encourage Participation

Ensure all stakeholders have the opportunity to contribute their insights and perspectives. Active participation in benefits mapping leads to greater stakeholder buy-in and commitment to project outcomes.

4. Use Visual Aids

Employ large sheets of paper, sticky notes, or digital tools to create a dynamic, evolving map during the session. There are different types of learners, and many people reinforce their engagement if the information is shared using more than one style of learning (visual, aural, kinaesthetic, auditory-logical or word-logical). Visual representations enhance strategic planning processes and outcomes [17]. At least one study shows that digital sticky notes are as effective as physical sticky notes, although for different reasons (in compensation of the limited access to body language and aside conversations, everyone can get to the front and read every note [18]).

5. Challenge Assumptions

Continuously question the links between elements to ensure they are logical and supported by evidence. This critical thinking approach is supported by the work of Kahneman et al. on cognitive biases in decision-making [19].

The Iterative Nature of Benefits Mapping

Benefits mapping is not a one-time exercise but an iterative process that should be revisited and refined throughout the project lifecycle. People have a limited capacity for focus and repeated reminders are more likely to ensure focus on the right things – the benefits.

> *"continuous benefits management throughout the project lifecycle leads to higher rates of benefits realization" [20].*

Besides which, the environment both external to the project (strategic objectives, constraints, balance of requirements across the portfolio) and internal (obstructions causing changes in the activities or early / late delivery of outputs) could result in important changes to benefits which might demand a change in direction[21].

By providing a clear visual representation of how project activities contribute to organizational goals, benefits mapping helps maintain focus on value creation and supports effective decision-making. As project environments evolve and new information becomes available, the benefits map should be updated to reflect these changes.

Conclusion

Benefits mapping workshops are a powerful tool for inspiring and engaging stakeholders in the project management process. By fostering collaboration, challenging assumptions, and creating a shared vision of project benefits, these workshops can significantly enhance the likelihood of project success and value delivery.

As experienced project management professionals, we should embrace the iterative and collaborative nature of benefits mapping. By doing so, we can ensure that our projects remain aligned with organizational goals, stakeholders stay engaged, and the promised benefits are realized.

Remember, the true value of benefits mapping lies not just in the final artifact produced, but in the journey of collective discovery and commitment that the process engenders. As we continue to refine our approach to benefits management, let us harness the power of these workshops to drive meaningful change and deliver lasting value to our organizations.

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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.

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