



Benefits management plan

[Project/Programme name, eg, Document Management System Implementation]

Sponsor: [Name, Job title]

Benefit owner:: [Name, Job title]

Project/Programme objectives

[What will the project/programme achieve? What are the key deliverables? *Eg, The project will implement a new document management system to achieve greater efficiency, higher information security and accuracy. This aligns with the strategic objective: increased business agility.*]

Who will benefit and how?

[Who will primarily benefit from the initiative, and in what way? *Eg, Staff will save time finding relevant and up to date information. Information will also be more secure.*]

What are the benefits? How will they be measured and tracked?

[List benefits, KPIs and measures together with their baselines and targets. Use a table or map to capture the information. Ideally you should have no more than 3-5 benefits and 1-2 KPIs and Measures per benefit. *Eg:*]

Objective

Benefit

KPI

Measure

Baseline

Target

Improved business agility

Faster access

Reduced effort

% time

30% – July '25

xx/xx

Improved accuracy

Reduced number of errors

Error rate

50% – July '25

xx/xx

Improved security

Lower number of security incidents

of incidents

50 – July '25

xx/xx

When will the benefits be realised?

[Provide a benefits schedule or timeline. When will they be enabled? When will they be realised? For how long will they be tracked? *Eg:*]

Benefit	xx/xx	xx/xx	xx/xx	xx/xx	xx/xx
Benefit 1	10%	20%	50%	80%	90%
Benefit 2	15%	30%	50%	75%	85%
Benefit 3	0%	0%	25%	50%	75%

Roles and responsibilities

[Provide a RASCI matrix for the different roles and responsibilities associated with good benefits management – this should be aligned with the project or programme methodology. *Eg:*]

	Sponsor	Benefit Owner	Project Manager	Benefits Manager	Measurement Owner	Change Manager
Identify	C	A	R	C	C	C
Agree	R	A	R	C	C	C
Plan	C	A	R	C	C	C
Measure	C	A	R	C	R	C
Report	I	A	R	C	C	C
Review	I	A	R	R	C	C

Benefits assumptions

[What are some of the assumptions on which the benefits estimations are based? *Eg, Use of the new document management system will be mandated.*]

Constraints and dependencies

[What are some of the environmental constraints that need to be factored in to achieve the benefits, or what other pieces of work might it be dependent on? *Eg, Travelling or offsite staff will be unable to access the document management system*]

Disbenefits

[Are there any potential disbenefits of the programme that might counter the benefits? How will their impact be minimised? *Eg, Cost and inconvenience of maintaining two systems in parallel*]

Benefits risks

[What are some scenarios which could prevent the benefits from being realised and what are some of the mitigations that can be put in place to avoid or manage these? *Eg, If staff do not adopt and use the content management system appropriately, then information accuracy and quality may be compromised.*]

Change management and handover

[How will change be managed so that benefits realisation happens? Who will the benefits be handed over to? *Eg, The system will be rolled out in a phase manner with adoption being measured at the end of pilot. The system will be handed over to the Manager – Information Services at the end of the project*]

