

Benefits management plan

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

Sponsor: [Name, Job title]

Benefit owner: [Name, Job title]

Project/Programme objectives

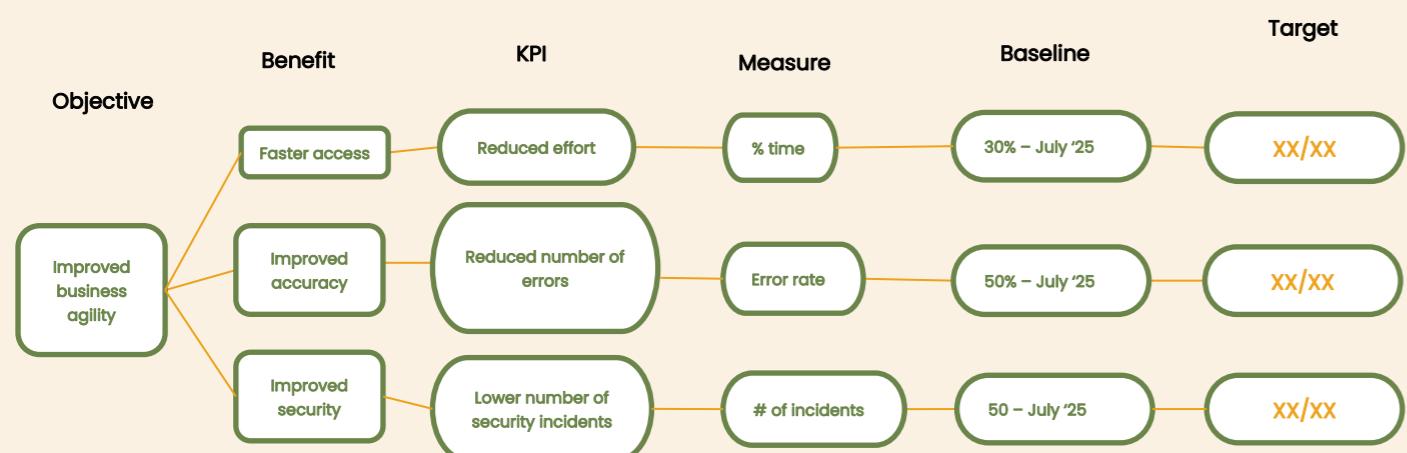
[What will the project/programme achieve? What are the key deliverables? Eg, The project will implement a new document management system to achieve greater efficiency, higher information security and accuracy. This aligns with the strategic objective: increased business agility.]

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:]



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]

