

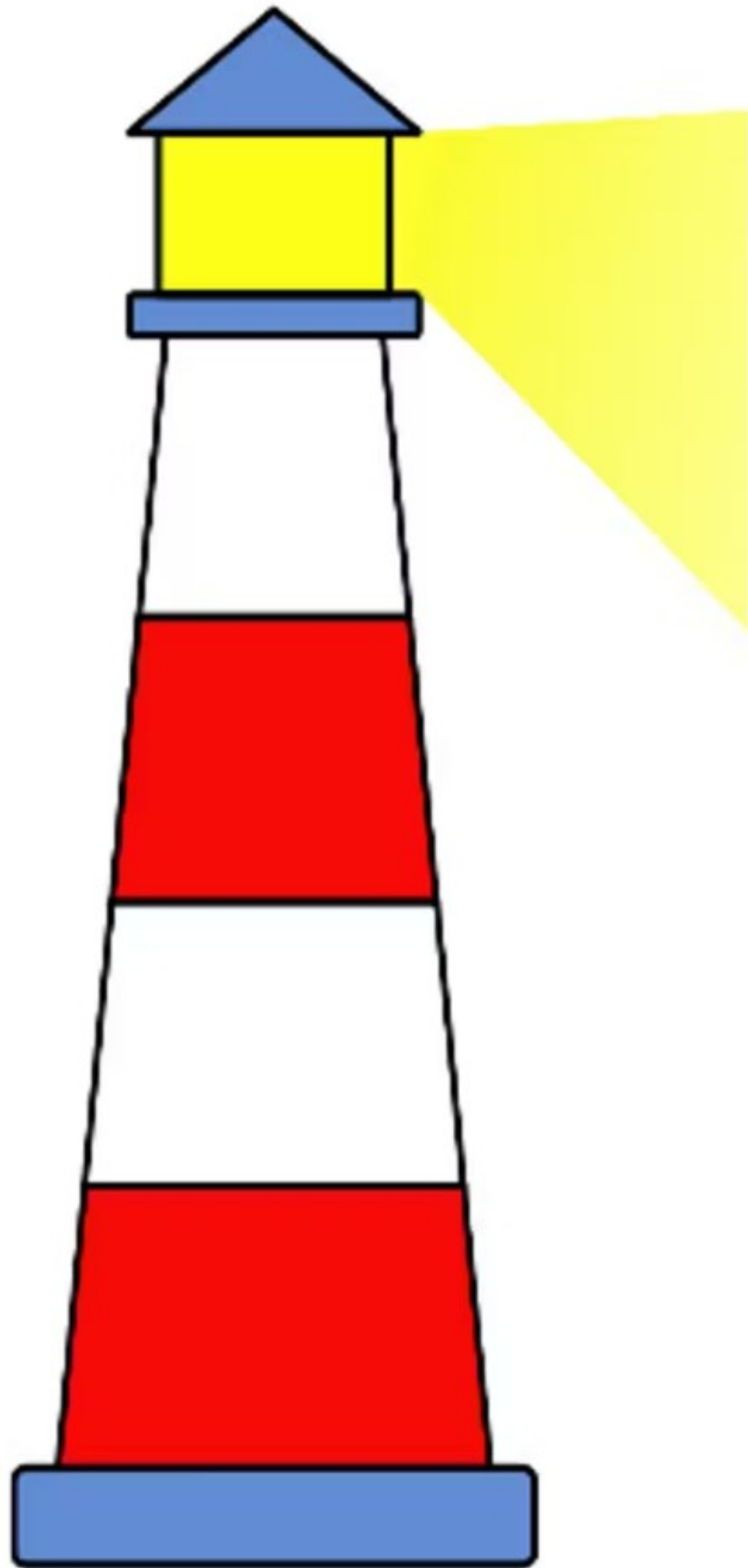
# How to use Benefits Management to encourage Change and overcome Obstacles

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# Purpose of this Session

- What are the benefits of benefits management?
- Understanding obstacles to project success
- Using benefits to overcome obstacles





# Why benefits? Why Benefits Management?

- **To inform decisions and prioritization**
  - Understand ROI in the broadest sense
  - Compare different opportunities for investment
  - Understand impact of changes to a project
  - **BUT** human sanity check - are we measuring the right things?
- **To engage and Inspire**
  - What's in it for Me? Get people excited
  - Overcome obstacles to change
  - ensure the right project ("my project") gets priority



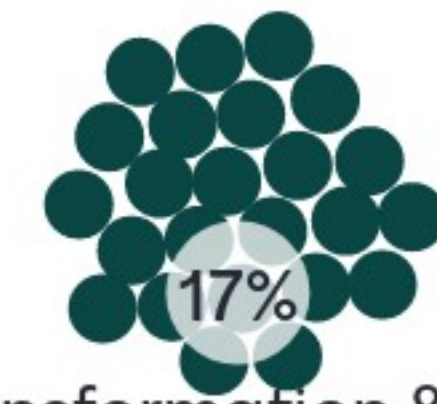
# What type of project are you working on at the moment?



Infrastructure and Construction



Government Transformation & Service Delivery



Commercial Transformation & Service Delivery

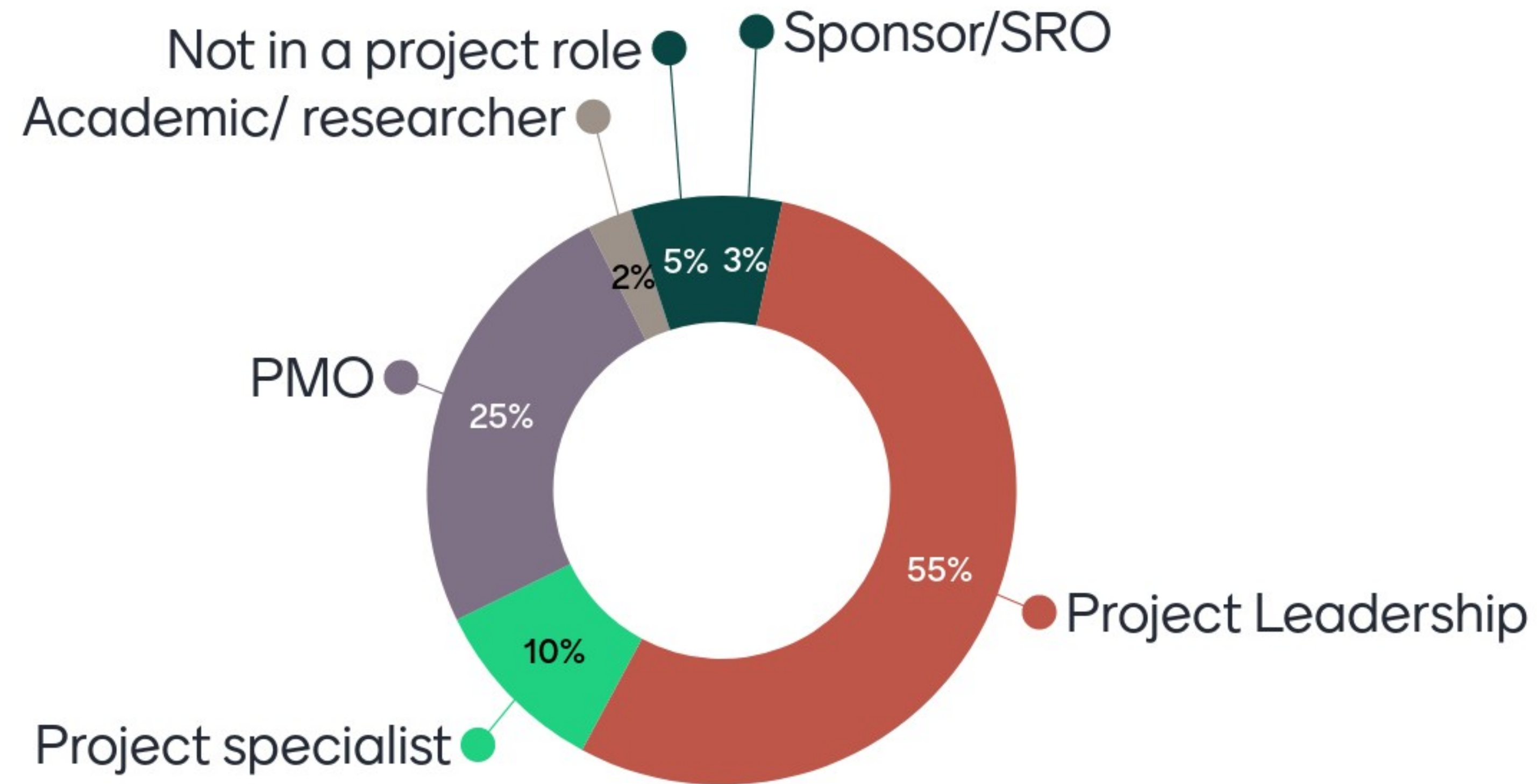


Military Capability

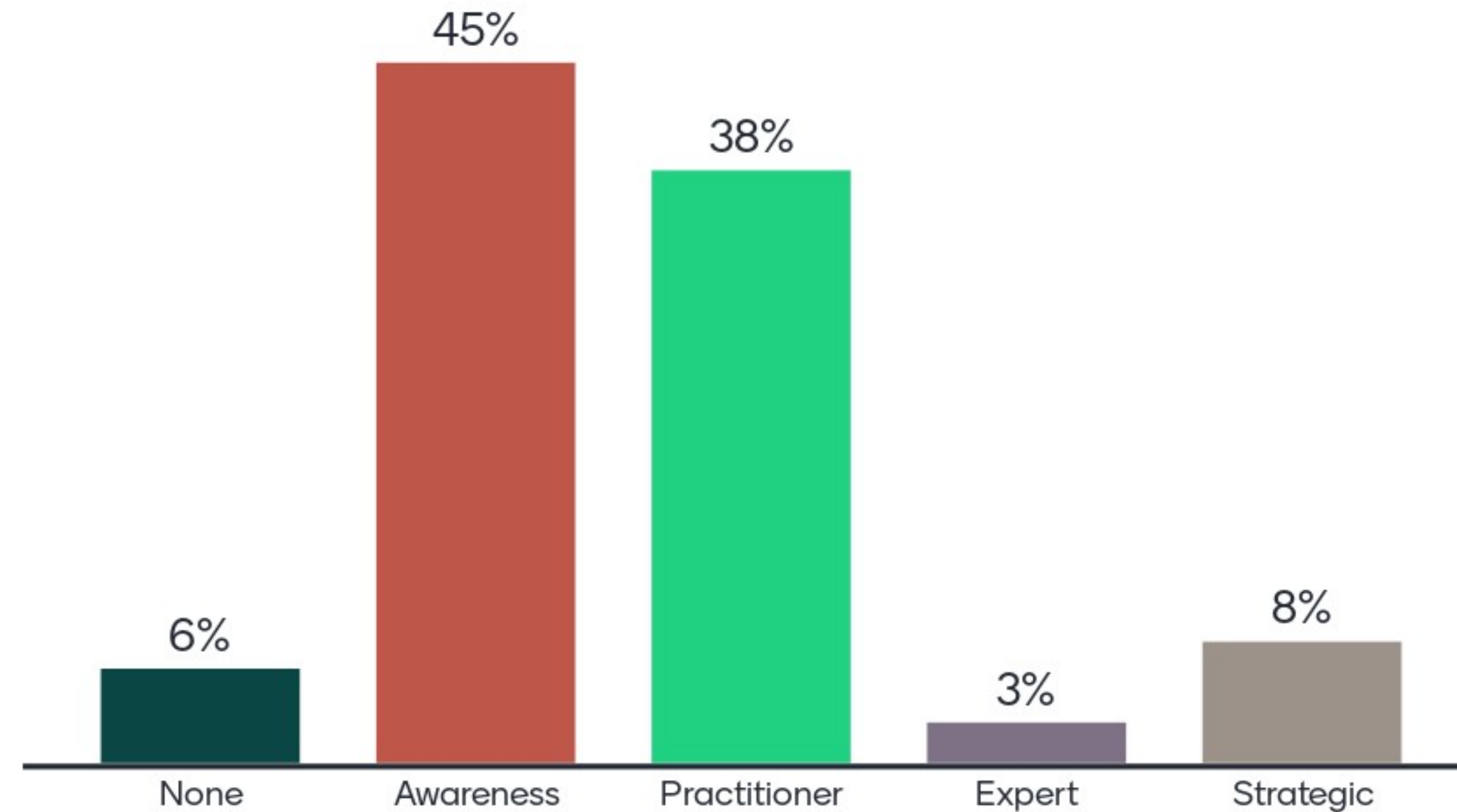


Information & Communications Technology (ICT)

# What role do you typically perform?



# What's your experience with benefits & value?

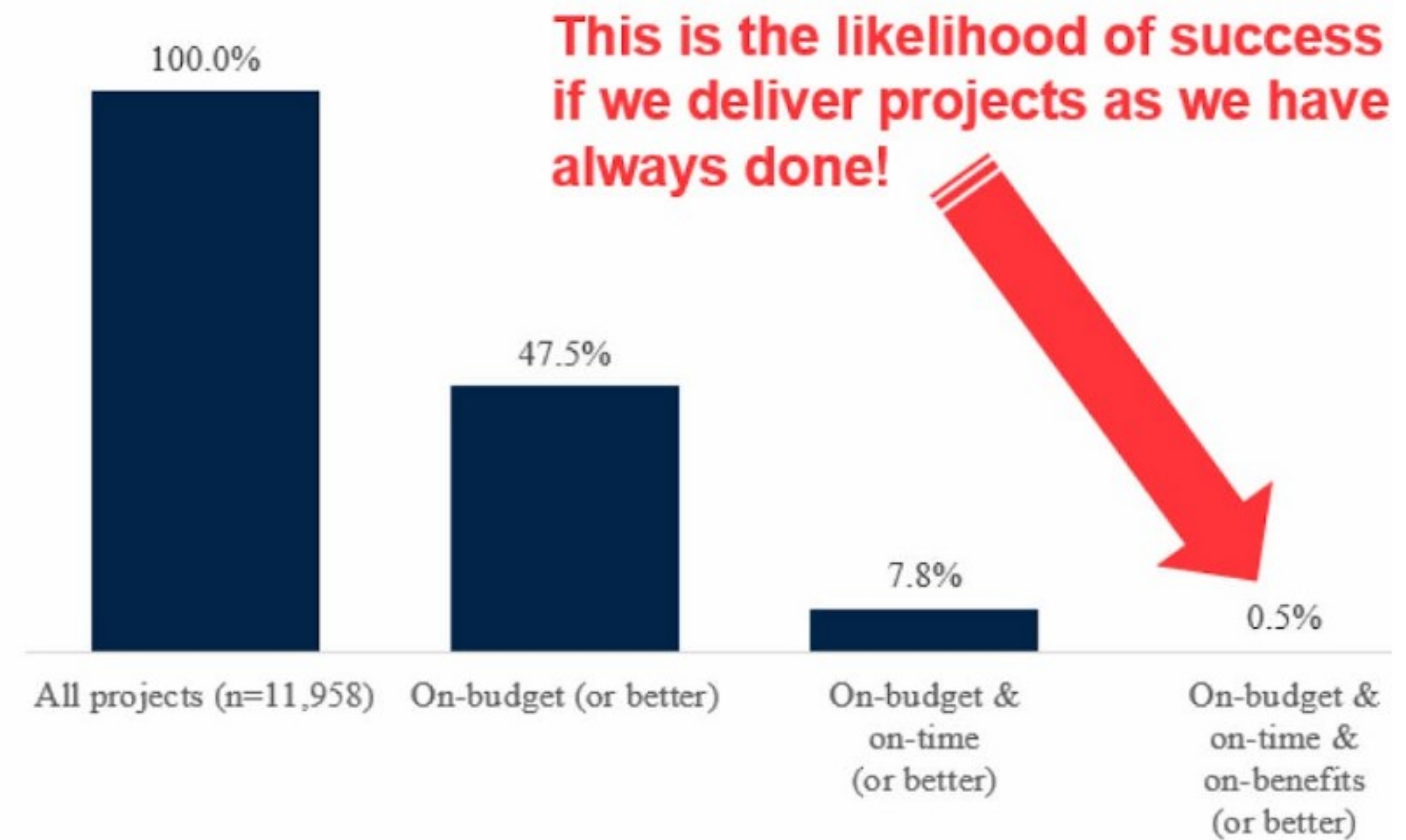


# The disconnect between project planning and value creation

- Projects lose sight of WHY they were started
- And become TASKS without real meaning
- And PEOPLE resist "pointless change"



## The Iron Law of Projects





# What has caused project failure (failing to realise benefits) on a project you have worked on?

Not defining benefits

Failing to clearly understand and articulate the expected benefits

Lack of stakeholder engagement

Initial scope not clearly defined

Not understanding what the outcomes are aimed to be

Stakeholder engagement  
Unrealistic scope

Over ambitious requirements

Lack of upfront funding from customer

# What has caused project failure (failing to realise benefits) on a project you have worked on?

Lack of resource

Scope creep

Lack of required resource

Too many benefits identified

Unclear requirements

The project does not deliver benefits until after its completion. Therefore will not realise its benefits until later.

Lack of time

Ineffective communication of the benefits

# What has caused project failure (failing to realise benefits) on a project you have worked on?

In achievable expectations of what would be possible to achieve

Funding reduction

Regulatory requirements

Poor end user training.  
Dictating a new system rather than listening to/giving the end users what they need.

Undefined benefits at the start  
Scope creep  
Poor change control

Competing portfolio priorities

Poor definition of benefits and measures of success.  
Changing benefits case and thus shifting goal posts.

No focus on benefits just focused on outputs or budgets

# What has caused project failure (failing to realise benefits) on a project you have worked on?

Dependencies on other projects fail

Having to meet regulatory requirements not scoped out in the initial outset

Relentless focus on internal benefits (cash, profit, growth) over external (customer needs, social improvements)

Conflicting priorities and benefits

Lack of end user engagement

Project team changes  
Org changes

Lack of SQEP resource availability

Change of senior leadership

# What has caused project failure (failing to realise benefits) on a project you have worked on?

Badly defined initial requirement

Long programmes can change direction so original benefits not necessarily achievable anymore

Funding shortfalls

Poor sequencing and prioritisation of a programme's projects

Scope changes

Lack of sponso direction and engagement

Undefined / unclear success criteria for an organisation-wide culture change initiative.

Project objectives & outputs not clear

# What has caused project failure (failing to realise benefits) on a project you have worked on?

Resources not doing what is expected of them. Incorrect resources assigned to the project.

New ministerial objectives and multiple changes of minister  
Reprioritisation of projects in organisation  
Shortage of specialist resources

Project not being outcomes/benefits driven

Lack of good change control.  
Lack of engagement from end users.  
Lack of buy in from senior management.  
Bad definition of project outcomes/benefits at the start.

Leadership/Minister wanting something not based on User need

Opportunity management not prioritised

Not enough data available to support need of project

No market research  
Lack planning and considering benefits  
Slow to implement  
Lack of awareness of other projects impacting benefits

# What has caused project failure (failing to realise benefits) on a project you have worked on?

Lack of monitoring and tracking of benefits

Detailed scoping and benefits defined to late in project

Ongoing scope creep often results in a Project being deemed to have failed. Poor stakeholder management and communication can result in active resistance to change which prevents benefits realisation.

Defined benefits not measured and visible in project schedule.

Lack of ongoing management scrutiny

Lack of client buy-in

Retrospective review no defined KPIs

World changed, market disappeared

# What has caused project failure (failing to realise benefits) on a project you have worked on?

No business case  
No thorough scope or planning  
Poor Communication  
Poor stakeholder engagement  
Not knowing the why  
No knowing the benefits  
No clear future plan  
Resources  
Budget  
No governance

Lack of vision - outcomes

Failure to implement factors critical to benefit realisation

Change in executive sponsorship, losing momentum and resources, disrupting progress. Lower maturity in understanding benefits management. Poor focus on social value.

Poor project planning and knowledge

The project cycle runs over a financial year so after the outputs have been delivered. There is often limited budget or time / resource to measure the benefits from the project.

Overpromising at the start

Lack of prioritisation



# What has caused project failure (failing to realise benefits) on a project you have worked on?

Lack of on going measurements

Agreement to a Defined Set of Requirements

Change in business priorities  
Scope creep Organisational restructuring  
Single point of failure (in resource)

Technical failure. Not bringing the whole team along with the change - persistent resistance.

Lack of flexibility

Scope change midstream and engagement of stakeholders waning

Changing desires

Lack of definition and f benefits and metrics  
Retrospective benefits management  
Enabling project focus on keeping the lights on

# What has caused project failure (failing to realise benefits) on a project you have worked on?

Realistic on the timelines |  
resourcing implications Buy-  
in from top down

Lack of shared learning

Expectation  
management

Misaligned outcomes.

not enough funding

Scope change

Change in political  
direction

Lack of clear benefit  
definition

# What has caused project failure (failing to realise benefits) on a project you have worked on?

Over Governance

Money finished

Change for the sake of  
change

Undefined scope

Benefit mindset  
articulation and key  
success criteria

Cost increases

Not capturing  
requirements first

Stakeholder Engagement

# What has caused project failure (failing to realise benefits) on a project you have worked on?

Misaligned benefits

Unrealistic expectations

Lack of decision making

Failing to account for uncertainty

Poor baseline to measure change against

Leadership support

Not understanding the problem

Optimism on what the benefits are

# What has caused project failure (failing to realise benefits) on a project you have worked on?

Different views of what is wanted

unclear decision maker or too many cooks

outputs vs outcomes

Poor benefits measures (qualitative measures especially!)

Personal Ambition

Poor communication

Not measuring benefits properly - impact

lack of flexibility to adapt to changed business requirements/ circumstances throughout the project

# What has caused project failure (failing to realise benefits) on a project you have worked on?

Stakeholders  
Change in scope  
Unrealistic benefits up front  
Lack of change / benefits management

Unquantifiable benefits.

Governance  
Over optimism  
Decision making  
Organisational structure  
Re making decisions  
Lack of respect for process  
Lack of accountability  
Poor communication

Change resistance and poor planning of resources

Lack of consensus

Lack of business ownership

Stakeholder engagement

Change fatigue, under estimation of resources

# What has caused project failure (failing to realise benefits) on a project you have worked on?

Retrofitting benefits

Failure to keep the desired benefits up to date and relevant over time

Only thinking of benefits in short term, rather than long term.

Lack of engagement with users, early and often

Optimism bias

Not being SMART

Focus on output not outcome

Disjointed planning

# What has caused project failure (failing to realise benefits) on a project you have worked on?

Lack of education on the purpose

Lack of collaboration in cross cutting programmes, where end benefits are high level

Failing to get enough people on board and feeling really bought in to the outcome

Scope creep

Stakeholder engagement, lack of planning and Resource constraint.

Buying a product (software) the business didn't need

Scope creep

Lack of benefits processes in place. Company rewarding outputs as opposed to values.



# What has caused project failure (failing to realise benefits) on a project you have worked on?

Not tracking the right benefits

No benefits owner

Difficulty of measuring benefits

Failure to maintain strategic alignment with scope change

Not agile enough - no monitoring of benefits regularly

Poor external monitoring to ensure the reasons started are still applicable

Competing resource priorities BAU and project

Not defining benefits

# What has caused project failure (failing to realise benefits) on a project you have worked on?

No definite outline of benefits from project initiation.

Scope creep and diverting budget to meet organisation's need (not project need).

Not defining the benefit and success criteria

Too many late variations

Guarded competitiveness between supply chain

Lack of comms and therefore buy in

Losing sight of the original benefits.

Lack of planning

# What has caused project failure (failing to realise benefits) on a project you have worked on?

Poorly defined scope. Lack of buy-in from executives and sponsors. Lack of funds. Lack of people. Geographical constraints.

Failure to stop projects

Academic v practical clash... too many scope changes and variations... outcomes v outputs

Benefits can get dismissed in fast paced project delivery

Lack of Clarity on what's in it for the end customer

BAU not owning ongoing

Data not available

Lack of understanding the why

# What has caused project failure (failing to realise benefits) on a project you have worked on?

Not defining the scope

Under resourced planning

Stakeholder engagement, poor planning and lack of resources

Failure to agree on the value of anticipated benefits

Not enough time thinking about what to measure and how. Not enough time on planning phase. Pre-formed ideas on what the solution should be. Lack of engagement

Risk appetite

Internal resource constraints in org with functional structure, with high demand for change

Resourcing mismanaged  
Expectation not aligned

# What has caused project failure (failing to realise benefits) on a project you have worked on?

Define benefits at an earliest stages and set KPIs to measure success. Continued to review and define

Limited resources/ skilled labour, time constraints, lack communication, agreed scope and emotional support

Sponsor willingness to engage in benefits management

Failure to define the purpose, approach and expected outcomes at the outset

Sponsors role responsibilities to realise benefits post closure

Stakeholder misalignment

Imposed timelines

Insufficient engagement, communication, definition of scope

# What has caused project failure (failing to realise benefits) on a project you have worked on?

Diverting funds to pay for unforeseen project dependencies

Misassumption that the PM does delivery

Delayed decision making  
Not enough time and effort being placed at the planning session to start

More so identifying benefits and not actually realising them

Communication. Speak to right people right time. Project budgets are calculated with poor data. Resistance from groups. Poor understanding of the project by others.

Ensures you spend time on most beneficial projects with highest chances of success.

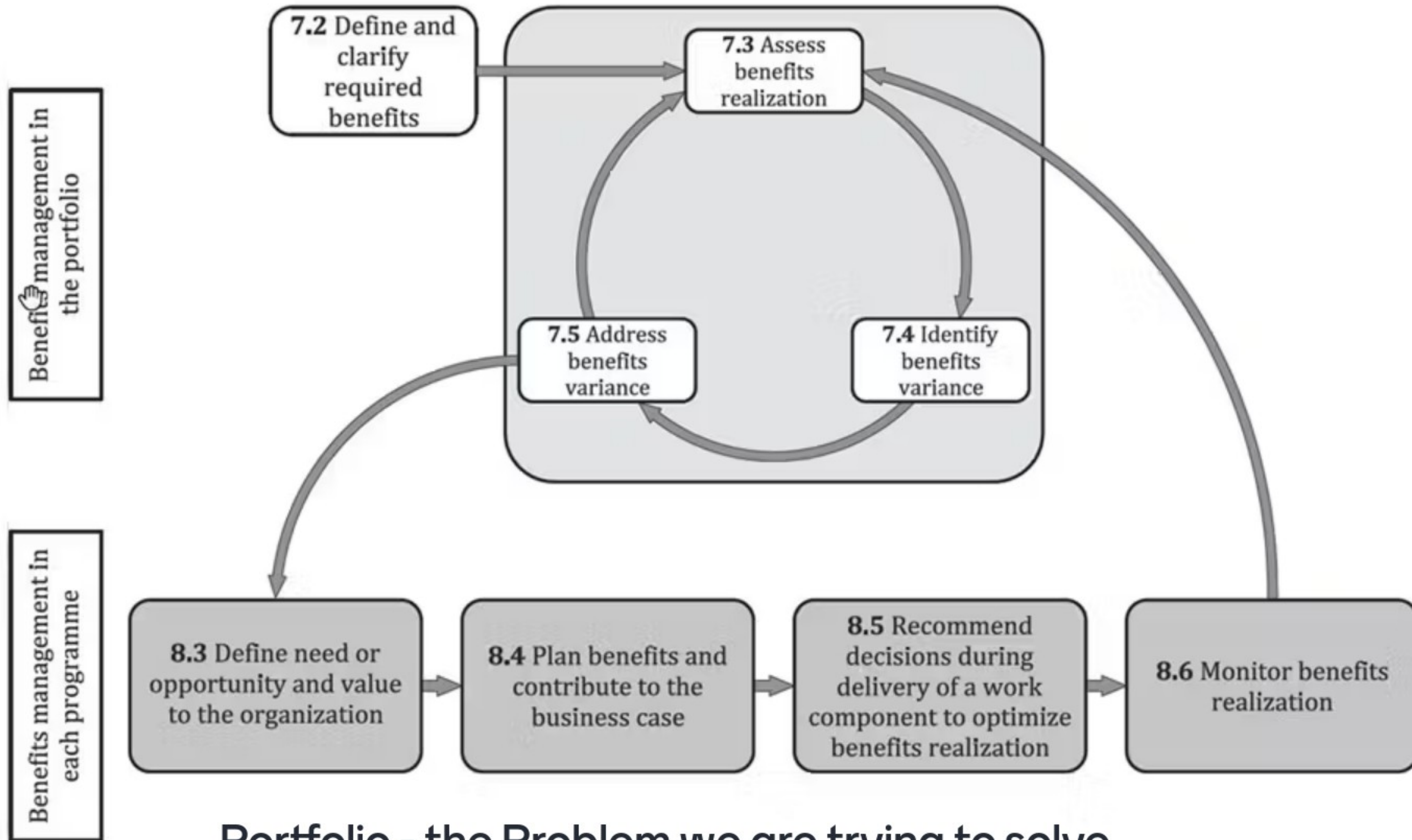
# Some common challenges that could cause project failure

- Sponsorship and clear connection to money - don't know WHY
- Focus on tasks not consequences/benefits - poor planning
- Failed to engage with stakeholders and understand what they want/need
- Failure to change behaviours and processes

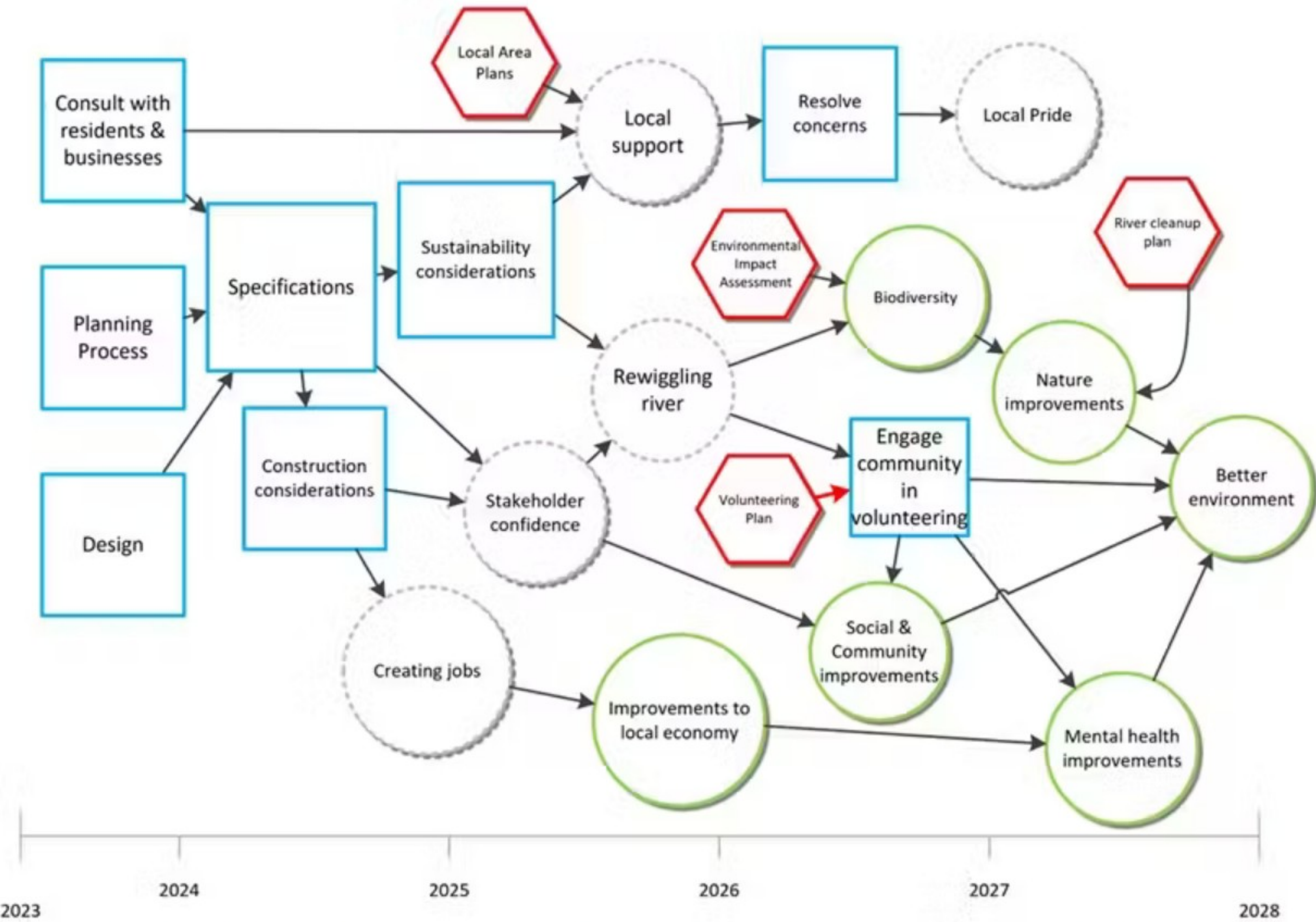
# An integrated approach to benefits management

- **WHY:** What's the problem we're trying to solve?
- **How much** is it worth to solve this problem (benefits)
- **Proportionality** – where do we put our effort?
- **Communication** – overcoming obstacles





Portfolio - the Problem we are trying to solve



## Stakeholder Engagement via Benefits Mapping - Logic Chains

# Benefits Management as a motivational tool

- We come to work to do a good job
- **Scenario:** how would you use benefits and value management to improve your success?



# Scenario: How would you use benefits & value management to improve your chances of success?

Prevent scope creep

Reward sales for benefits realised, not for orders won...

Everyone engaged and on the same page from the start

Focus effort on activity that delivers the benefits

Ensures clear outcomes

Use as project team goal

Reiterating the benefits to the team periodically... keep the big picture in view and ensure alignment

Embed benefits into overall lifecycle

# Scenario: How would you use benefits & value management to improve your chances of success?

Use benefits mapping as a decision making tool to empower stakeholder engaged decisions

Early engagement with stakeholders

Stakeholders to communicate the benefits wider.

To create and uphold a success project delivery vision

Outline the benefits strategy to stakeholders

Assessing change requests

Priorities of the project scope

To stay aligned to project scope.

# Scenario: How would you use benefits & value management to improve your chances of success?

Communicate the benefits upwards to get the buying and downwards so they understand why we are doing it.

To drive data lead portfolio management (decision making).

Measuring regularly

Priorities sorting

Integrate metrics of benefits and values in to communications plan to increase stakeholder engagement

As a tool to ensure that decision makers are able to prioritise effectively, also to improve communication and stakeholder engagement,

Assign an owner to the benefit

Visual communication tool to keep all stakeholders engaged

# Scenario: How would you use benefits & value management to improve your chances of success?

Define benefit statement and set plan to track it in different stage of project.

Prevent scope creep  
Visual benefits map  
Alignment with change control  
Focusing on wider benefits rather than single outcome

Engaging stakeholders, identifying deliverables, identifying senior responsible owners.

Improving stakeholder confidence

Focus resources

Prioritisation if project within portfolio  
Stick to gain funding

Align to ongoing value delivery and mitigate scope creep

Client engagement

# Scenario: How would you use benefits & value management to improve your chances of success?

Establish measurable outcomes

Activate decision makers

Consult with all stakeholders - customers, supply chain etc.

Use the benefit angle to using an approach and how it will bring value to the end users

How the project gives benefits

Use a map to declare and keep visiting vle the intended benefits and use it as a test for priorities and change management

Communication of project goals.Keeping project on track.Analysing whether project should continue.

Scope properly defined, with all stakeholders, and then approved.Resources decoyed to projects.



# Scenario: How would you use benefits & value management to improve your chances of success?

Pre define them!

Check there is benefits map in place.

introducing metrics and monitor regularly

Identify quick wins  
Move projects out depending when value is needed

Keeping the North Star present for stakeholders and ensure the project tracks towards the desired benefits

Ensure capacity is appropriately distributed according to weighted value

Communicate to get buy-in from users - make them want the change

Continuous visibility of what the benefits are

# Scenario: How would you use benefits & value management to improve your chances of success?

Ensure proper engagement with stakeholders at early stages

Do benefit mapping with the client

Keep tracking

Define a success criteria for benefits and measure the deliverables at the end or during a project

Common purpose

Review benefit realisation at every Sprint  
Retrospective/stage gate of the process to measure and plan ahead.

It helps keep stakeholders motivated

Set targets

# Scenario: How would you use benefits & value management to improve your chances of success?

Mapping benefits correctly then refreshing profiles at regular intervals to keep them current and realistic

Ensure benefits are tracked and if not going to be realised or they change, remove or update them on documentation ready for tracking again

Monitor how each milestone moves towards the benefits

Show the success of change. Time cost savings etc. Learning a new system gives people more skills.

Communication tool

Be clear about the outcomes (why) - and align with all key stakeholders - use that to drive decisions throughout the project lifecycle to ensure benefits / outcomes realised

Monitor

Regular Communication at both project team and sponsor level

# Scenario: How would you use benefits & value management to improve your chances of success?

Integrated with the broader project/programme Exec , agreed up front then regularly assessed with the end users

Prioritisation

Stakeholder communication tool - to highlight end state (useful to align)

Communicate benefits to stakeholders better

Define clear outcomes

Keep people motivated and focused on why we're delivering the project.Enable effective decision making - needs the right structures and integration in organisation.

Refine key priorities

Ownership of benefits with a small team of key project members

# Scenario: How would you use benefits & value management to improve your chances of success?

Regularly communicate to all stakeholders of the benefits management products throughout the project lifecycle.

Continue to review them with sponsor and project teams

Think about the why's and communicate them to all to help decision making. Set measurable targets.

Question the value of all current activity and give the PM more power to the elbow to descope some activity

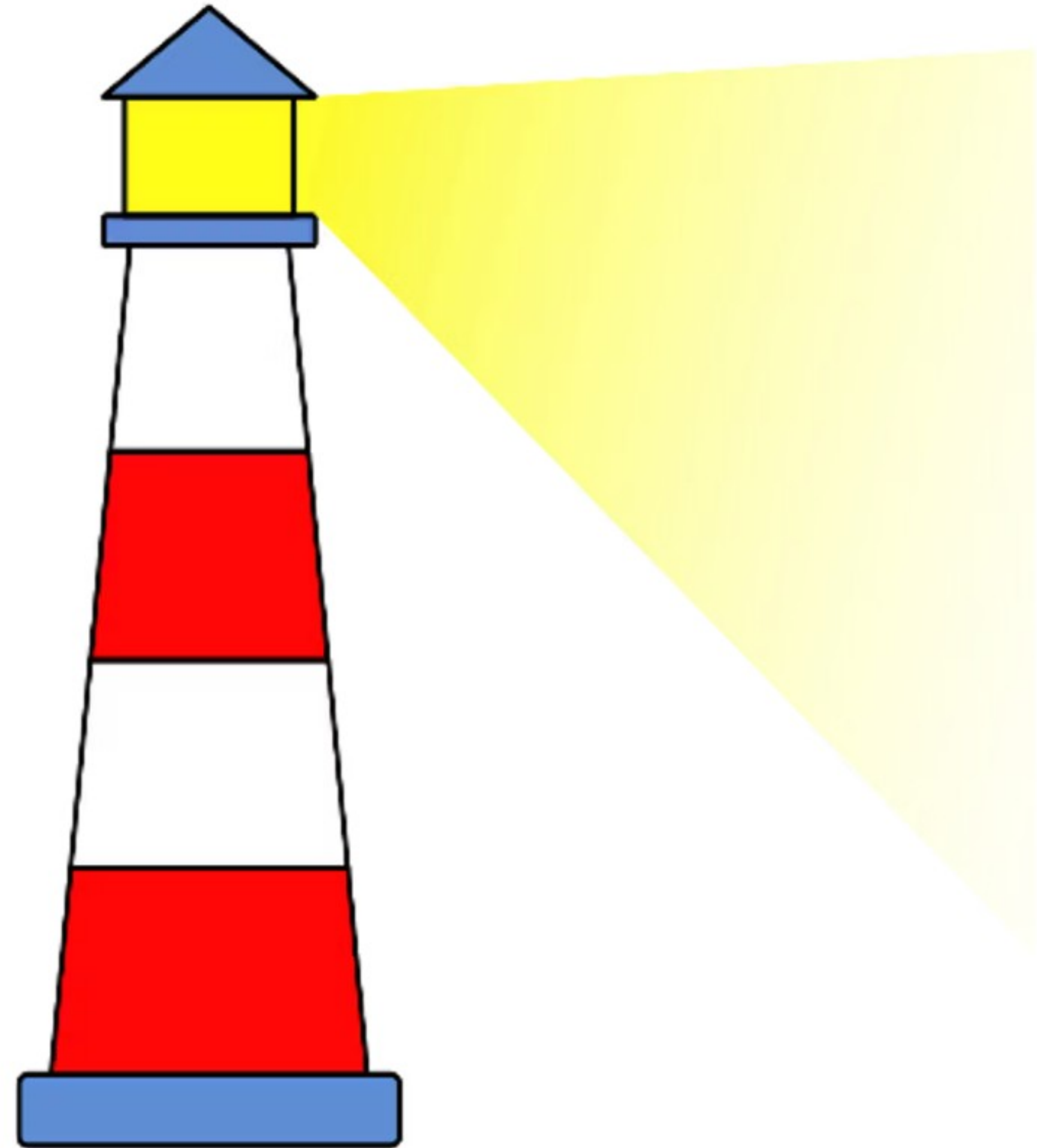
Check ALL the benef

Take everyone stakeholders and end users on a journey

Understand the full impact of cost reduction

# Key Takeaways

- Get the “done-to” people on side by engaging them in benefits discussions
- Sponsor, leader & delivery use logic chain (benefits maps) for consequences of changes to project activities
- Keep stakeholders (including “done to” people) informed of WIIFM – benefits
- Track confidence in benefits realization before you can track actual benefits realization



## Dr Hugo Minney ChPP, CMgr, FRSA

- Panel chair/lead author BS202002:2023 benefits management
- Lead: APM Benefits & Value interest network
- Founder: APM Sustainability interest network
- SME for benefits at Sellafield Ltd
- Chartered Project Professional



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