Benefits Realisation Plan

[Insert name of project]

[Month YYYY]

Contents

[Purpose 3](#_Toc525896761)

[Introduction 4](#_Toc525896762)

[Purpose of Document 4](#_Toc525896763)

[Project Background 4](#_Toc525896764)

[Review 4](#_Toc525896765)

[Roles and Responsibilities 4](#_Toc525896766)

[Benefit Map 6](#_Toc525896767)

[Benefits Realisation Tracker 8](#_Toc525896768)

# Purpose

The Benefit Realisation Plan (BRP) is a document that should be developed throughout the business case process. It should be finalised at Full Business Case (FBC) stage.

Its purpose is to, firstly, demonstrate that adequate plans are in place for the realisation of benefits. It is also to be used for reviewing realisation progress during delivery. This information will provide the basis for quarterly reports to the Project Board and Project and Portfolio Delivery (PPD). PPD will provide support throughout.

This document must be signed-off by the Project Board, and ultimately will be approved as part of the business case by the Portfolio Investment Committee (PIC).

As part of the BRP, each Benefit is fully profiled

# Introduction

## Purpose of Document

The purpose of this document is to:

* agree the benefits to be tracked and delivered;
* capture the key information to enable the tracking, measurement and delivery;
* agree roles and responsibilities; and
* agree how the project’s benefits contribute to the Home Office Strategic Aims (eg the Benefits Map at Annex A).

## Project Background

*This is a general text area to provide a brief background to the project.*

## Review

This document should be reviewed at least on a quarterly basis, when:

* Working with the Project and Portfolio Delivery (PPD), the tracker (section 3) should be reviewed, updated in the Profiling tool and reported to the Project Board;
* Once agreed by the Project Board, information provided to PPD;
* PPD include information in their Quarterly Benefit Dashboard;
* Any material changes to the benefits should require a Business Case Update to be resubmitted for approval;
* On an annual basis, or in line with key milestones, the Project should hold an in-depth benefit review session, chaired by the SRO and attended by key stakeholders and PPD.

## Roles and Responsibilities

*The following table sets out the key roles and responsibilities in the Benefit Management process for each Project. PPD can provide support throughout the process.*

|  |  |  |
| --- | --- | --- |
| Benefit Realisation Role | Responsibility | Named Individual  (indicate Role) |
| Senior Responsible Owner | * Ensures that the Project and the business areas affected maintain a focus on benefits delivery * Chairs benefits reviews involving relevant stakeholders, business managers and possibly internal audits * Authorises benefits achievements |  |
| Project Manager | * Develops the Benefits Realisation Plan and Business Case in consultation with the Business Change Managers, relevant stakeholders and members of the Project teams * Initiates benefits reviews as part of the Benefits Realisation Plan or in response to other triggers * Work with PPD to enter and validate benefits data entered onto Profiling Tool |  |
| Business Change Manager | * Provides information to support the creation and delivery of the Benefits Realisation Plan * Develops and maintains the Benefits Profiles * Ensures there is no double counting of benefits * Ensures the implementation and embedding of the new capabilities are delivered by the Project * Initiates benefits review after the Project has closed * Work with PPD to enter and validate benefits data entered onto Benefits Profiling Tool. |  |
| Project Management Office | * Monitors the progress of benefits realisation against the plan * Produce performance reports as defined by the Project Manager * Maintains benefits information under change control and maintains audit trails of changes |  |
| Benefits Recipient | * Agrees the Benefit Profile prepared by the Business Change Manager * Agrees criteria for delivery of benefit(s) and signs off against this criteria on delivery of benefit(s) |  |
| Benefit Owner | * Agrees the Benefit Profile prepared by the Business Change Manager * Monitors the successful delivery of enabling business changes * Collects and reports data to evidence the realisation of benefits |  |

# Benefit Map

*Benefit Maps must be produced for each Programme or Project. They act as the ‘Business Case on One Page’. They show the changes delivered by the Project mapped to its benefits and ultimately to the Home Office Strategic Aims (i.e. demonstrating how the Project’s benefits will contribute to the Home Office achieving its Strategy).*

*PPD can support in the development of this product. It is one of the key products of the Identification Workshops.*

*Your Project Benefits map should be inserted in this section.*

# 

# Benefits Realisation Tracker

*This table can be used as the plan which is created at Outline Business Case (OBC) and finalised at Full Business Case (FBC)*

*This table can be used in delivery, once the Full Business Case (FBC) has been completed, for tracking purposes.*

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Ref | Link to Strategic Outcome | Description of Benefit[[1]](#footnote-1) | Benefit Owner(s)[[2]](#footnote-2) | Benefit Recipient[[3]](#footnote-3) | Relevant Milestones[[4]](#footnote-4) | Measurement[[5]](#footnote-5) | | Baseline[[6]](#footnote-6) | Target[[7]](#footnote-7) | Value[[8]](#footnote-8) | Realisation Date(s)[[9]](#footnote-9) | Status[[10]](#footnote-10) | Notes[[11]](#footnote-11) |
| **How** | **When** |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Dis-benefits** | | | | | | | | | | | | | |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |

1. Include Dis-benefits at the bottom of the table, completing the relevant columns [↑](#footnote-ref-1)
2. The Owner is the person who is responsible for the delivery of the expected benefits [↑](#footnote-ref-2)
3. The Benefit Recipient is the person, who will ‘benefit’ from the realisation. [↑](#footnote-ref-3)
4. Include the milestone(s) relevant to when the benefit will be realised [↑](#footnote-ref-4)
5. Describe how to measure achievement of expected benefits, and when they can be measured [↑](#footnote-ref-5)
6. Baseline measure from which the improvements will be calculated [↑](#footnote-ref-6)
7. Target measure that will signal the benefit successfully delivered [↑](#footnote-ref-7)
8. The value is the monetary value assigned to if possible, for the cost benefit analysis [↑](#footnote-ref-8)
9. Enter the date(s) that the benefit will be realised/delivered [↑](#footnote-ref-9)
10. The status of the benefit, use RAG colour key in the tables [↑](#footnote-ref-10)
11. Notes, also include the date the plan has been updated [↑](#footnote-ref-11)