**Benefits Workshop (module 1)**

**Identification and Mapping**

**Facilitators Guide**



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# Preparation

## Equipment

* Projector
* Laptop
* Flipchart paper & stands
* Post-it notes
* Flipchart Pens
* Blue-tack

## Room

* Ideally the room needs to be of sufficient size to split the group into two during the session. Wall space or flipchart stands will be required for session 3.6.

## Set-up

* Recommendation is for the workshop to be face to face due to the interactive nature of the sessions.
* The project should take responsibility for logistics i.e. time, date, location, booking the room and issuing the invites.
* Ensure the project invite the appropriate people, who can contribute. This could include, depending on the scale of the project: SRO, project manager/team, business change, Finance, Economist, CI, key stakeholders which should include operational representatives/end users.

## Facilitation

* Independent facilitators are recommended although this can be determined by the project.
* Recommendation is for the session to be delivered by two facilitators due to the nature of session 3.6.
* Appendix 1 provides links to learning for facilitation skills.

## Timings

* Workshop should last at least two hours although longer is recommended to ensure sufficient time is allocated to agreeing measures. The suggested agenda in Appendix 2 covers four hours if also completing part 2 in the same day, the workshop will last the day.

## Slides

* The slides can be adapted to suit the audience or the maturity of the project.

# Aims & Objectives

## Aim

* The aim of the workshop is to help identify benefits and create a clear project vision and in turn what benefits will be realised from achieving that vision. And how those benefits will be realised.

## Objectives

* Identify the benefits and a set of key benefits that are measurable, meaningful and trackable through the lifecycle of the project.
* Produce a benefits roadmap.

# The Workshop

## Pre Workshop

* Ensure all information required for the workshop is sent to participants at least 1 week in advance (see appendix 2 for a draft agenda).
* Arranging a pre meet with the SRO/project manager, to agree aims, objectives & roles during the workshop is strongly recommended. During this meeting you should get an understanding of what stage the project is at. This will influence how you should approach the workshop and how it will run.
* Ensure you are familiar with the Home Office Benefits Framework guidance. This will provide a view of how this workshop fits in to the wider context of benefits management across the portfolio.

## Introduction

* The introduction should, were possible, be delivered by the SRO. Add additional slides if required.
* It should include an overview of what the aim of the session will be.

## Overview of the Project

* Although most participants will be aware of what the project aims are it is recommended to provide an overview. This will ensure everyone has the same information and provide maximum benefit during the workshop. This overview should be provided by the project manager.

## Overview of Benefits

* Slides 4 to 6 will provide some background information regarding Benefits and include *what is benefits management?* And *why do we need benefits management?*

## Overview of Benefits Mapping

* The main output from the workshop will be a benefits roadmap that will visually represent the total picture of changes that the project will deliver. Some examples of benefits roadmaps are included in Appendix 4. You may want to include one of these in your presentation to help explain the mapping process.

## Benefits Identification and Mapping

* This session will form the largest part of the workshop. Slides 8 to 13 provide information on what outputs, outcomes, benefits, dis-benefits, benefits prioritisation and mapping against objectives are and your group will benefit from understanding this before you start the identification process.
* At this stage in the workshop you may want to split your group in to two or more subgroups, depending on numbers.
* The groups will need to be able to map across from output to outcome and benefit. If possible the example below provides a template for doing this initial stage. Use separate pieces of flip chart paper with each of the headings on, and get contributors to complete post-it notes with each entry..

|  |  |  |
| --- | --- | --- |
| Output | Outcome | Benefit |

For each of these activities, allocate a clear amount of time for three activities:

1. Subgroup or individual idea generation
2. Subgroup discussion
3. Feed back to the entire session
* **Outputs** - You will then want the group/ subgroups to begin the process of identifying the outputs. You will find it useful to keep the groups focused on one column at a time. i.e. outputs followed by outcomes then benefits etc.
* **Outcomes** – You will need to ensure that outcomes are not confused with benefits which can often be the case.
* **Benefits** – Benefits are the product of outcomes and should not be a replicated outcome.
* **Dis-benefits** – Every project will have dis-benefits and these should be identified and recorded. Ensure that the project team feed these in to any risk register that they may/will have.
* **Benefits mapping (1)** – It should be possible to link together the chain from Output to Benefit. Note these on the sheets to give a clear understanding of the roots of each benefit and disbenefit.
* **Benefits mapping (2)** – Benefits delivered by a project should align with the project, directorate and Home Office objectives. Having copies of these available makes this mapping process simpler.

## Next Steps

* Next steps should be delivered by the SRO / project representative.
* Next steps should include:
* Stakeholder management

This will be done by the project either at a further workshop with the key stakeholders present or separately but in consultation with the key stakeholders.

* Prioritisation, measurement, and ownership (module 2)

Once benefits have been identified they need to be prioritised, measured, and have ownership agreed before they can be realised. Details of an approach to this are in module 2.

# Summary

As mentioned above, the sessions you deliver do not need to mirror the guidance within this document. The size of your group, the stage of the project, the time allocated for the workshop and your preference in how this fits with your facilitation style will all have an impact on the look and feel of your workshop. The ultimate aim is on the end result and the output from the workshop.

Appendix 3 provides a number of visual examples which a benefits map may resemble.

Appendix 1

Facilitating meetings and work groups – E-Learning

Description: You will learn techniques to start and end meetings for groups of various sizes and purpose. By learning why, when and how to intervene in meetings, you will establish ways to get groups to work through the problem-solving process so they can agree and make sustainable agreements and decisions. You will finish this course by learning how to end meetings and, with action items assigned, everyone knowing what the meeting accomplished and what they need to do next.

<https://civilservicelearning.civilservice.gov.uk/learning-opportunities/facilitating-meetings-and-work-groups>

Appendix 2

**Benefits Mapping Workshop**

[Date]

[Venue]

**AGENDA**

**Aim**

To identify the benefits that will be delivered by the XXX project and understand the projects deliverables that lead to these.

**Objectives**

* To confirm the strategic drivers for the project
* To confirm the vision for the project
* To identify the benefits and outputs of the work
* To map these benefits against the projects and departments objectives

|  |  |  |
| --- | --- | --- |
| Timing | Item | Lead |
| 10:30 to10:45 | Welcome and introductions  | Project Sponsor |
| 10:45 to 11:00 | An introduction to XXXX project | Project Manager |
| 11:00 to11:15 | An introduction to benefits | Facilitator |
| 11:15 to12:45 | Benefits identification*An exercise to provide a picture of the drivers, vision, benefits and outputs that the project will deliver and how they are linked* | Facilitator |
| 12:45 to13:15 | Lunch |  |
| 13:15 to 13:45 | Benefits mapping*An exercise to confirm which benefits are produced by which outcomes* | Facilitator |
| 13:45 to14:15 | Benefits Mapping*An exercise to map the priority benefits to Home Office objectives* | Facilitator |
| 14:15 to14:30 | Next steps and close | Facilitator/Sponsor |

Appendix 3







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