

BA Manager Forum – Benefits Management workshop notes.

The notes follow from the workshops that ran on Tuesday 18th August 2020 for around 70 BA practice leaders in two separate sessions, on the subject of benefits management. The session was advertised as follows.

The history of business change is strewn with projects that have failed to achieve the predicted business benefits. However, in many cases, the failure concerns a lack of benefits management leading to uncertainty regarding the potential business benefits and whether or not they have been realised. This session will review the principles and techniques involved in managing benefits by considering the following topics:

- *The challenges and realities of benefits management*
- *The benefits management lifecycle*
- *Key benefits management techniques*
- *The business analyst role in benefits management*

The notes are then the outputs of the group discussions that took place. The notes have been edited only in relation to de-duplication of comments.

Exercise 1

What are the objectives of benefits management?

- Measure/demonstrate ROI and feedback loop for investment decisions
- Assess the drivers of change
- Better determine the requirements and what is to be achieved.
- Ensure change makes a difference
- Justify investment
- Focus on and ongoing discussion on outcomes/priorities/track if on target
- Manage stakeholders' expectations
- Prioritise and control scope
- Keeps communication lines open with customers and focus on their needs
- Helps focus discussion on the changes needed to meet goals/outcomes
- Can aid with the alignment to strategy & execution of this
- Helps with understanding when a project is done (80% enough - Pareto)
- Provides a purpose for a project
- Allows for discussion/focus on intangible benefits
- Helps to provide accountability for business outcomes
- To deliver value to the business
- Helps achieve organisational goals in line with the business strategy
- To identify the benefits
- Closer scrutiny of benefits
- Helps identify the point at which the benefit will be realised
- Identify who the benefits are for?

- Identify the metrics related to the benefits
- Plan the right actions to realise the benefits
- More focus on outcomes vs outputs
- Visibility of benefits tied to effort
- Aligning within and across programmes in terms of strategy
- Stops 'pet' projects
- Allows accountability
- Provides the basis of a plan / route to deliver benefits
- Tracking benefits to offer value to the organisation
- Benefits are realised in the right time scale - understanding the 'when' of the benefit delivery
- Benefits creating further opportunities
- Discover benefits that were not intended

Exercise 1B: Why benefits management may fail to ensure benefits realisation?

- Not followed through (post -project)
- Not measured
- Not defined/articulated well enough so not measurable
- Difficult to attribute benefits to specific changes
- Stated benefits not updated regularly enough – requires constant review
- Becomes a governance / tick box / bureaucratic exercise
- Benefits realised in BAU (Need collaboration with BAU & Change)
- BM not aligned with Agile
- No ownership of benefits - not tracked or managed
- Implementation focus – to deliver something
- Cost and time pressures
- Benefits/business case too optimistic
- Qualitative and quantitative benefits - too hard to measure
- Resource not assigned to take ownership, especially post delivery
- Immature in the process of BM
- Not always understood/lack of visibility
- Change in stakeholder or project personnel
- No as-is baselining to provide a start point for measuring
- Insufficient resources to make the benefits happen
- Insufficient challenging of assumptions
- High level benefits are often sacrosanct and can't be challenged
- Not as exciting as delivery
- Benefit reviews not completed
- Handover between change and BAU is problematic
- Benefit measures not clearly defined
- Strategy is not clear/open to interpretation
- Strategic changes aren't taken into account
- Stakeholders may not agree with the benefits (& the premise behind the change initiative)
- Lack of maths!
- No follow through to realisation

Exercise 2A: What is the role of the business analyst within the benefits management lifecycle?

- Identify stakeholders/benefit owner
- Helping owners identify the benefits
- Structuring benefits
- Take a project and programme perspective – holistic view
- Trace and track outcomes
- Map requirements to benefits
- Ongoing focus on business process improvement
- Understanding benefit owners / detractors of the change initiative
- Stakeholder management – ensure benefit ownership
- Identification of how benefits can be measured & when (& by who)
- Investigation of current state problems
- Creation of the approach / requirements to support future benefits measurement (e.g. number of complaints)
- Creation of the benefits realisation plan
- Defining the benefits
- Business Case definition and challenge assumptions
- Gathering the baseline data for benefits
- Ensure the change is valuable
- Selling role - encouraging adoption
- Prioritising the requirements in line with benefits
- Elicitation (pivotal to identifying benefits)
- Being open to other potential benefits and disbenefits
- Check delivery outputs against requirements
- Post project - handover or follow through
- Clearer expression of benefits – as tangible as possible
- BA can take on role of Product Owner
- Challenge whether requirements are aligned to benefits / scope / outcomes
- Support/collaborate with the Project manager/change manager / product owner (whoever owns the benefits)
- Identify additional benefits that may have been missed
- Review/verify business benefits are complete
- Reviewing all options with variants of benefits etc.

Exercise 2B: What would prevent the business analyst from supporting benefits management?

- Not being seen as part of the BA role
- Misunderstanding of BA role / not understanding the full BA capability
- Not enough time to 'embed'
- No budget to resource the time required to assess and track benefits
- BAs not involved post-project
- Lack of regular review of benefits
- Immature BA practice
- Strategy / Goals / Objectives not clear
- Sponsors do not want to be held accountable
- Lack of accountability when change moves into BAU
- Lack of competence in BM from the BA
- Lack of collaboration – project and wider stakeholders
- Initial business case defined before BA involvement
- Business case updated and taken in different direction without BA knowledge
- Time pressure on projects
- Lack of incentivisation where success is celebrated when benefits are realised - not focused on delivering value
- BA has not seen or been involved in developing the business case
- BAs disengaged or engaged too late
- Internal politics of challenging senior stakeholder views/Cultural barriers to raising awkward questions
- Poor time allowances
- Attitude - or simply just not seeing the value of BM
- Unclear direction / goals etc
- We are too busy doing everything else!
- BA can be too involved in the detail (Mud / Weeds) of delivery / execution
- BA is focused on enablers of the benefits
- Confidence/competence gap for the BA
- Benefits vague (poorly articulated)
- Business case doesn't exist or provides benefits which are difficult to measure
- Unwillingness to question the benefits if something changes in the project
- No clear sponsor to give guidance or support

Exercise 3A: Which business analysis techniques help with benefits management?

- VMOST framework
- Strategy Map
- Benefits dependency network
- Benefits (only) workshop
- Stakeholder management
- CATWOE
- Pains/gains VPC
- Voice of the customer
- Cost benefit analysis
- Environmental analysis / pivot / notice the change / question changes / alignment with strategy
- Logical thinking
- Questioning skills
- Communication skills
- Impact analysis
- Scenario analysis
- Facilitation of the process for benefit driven change
- Categorisation of benefits
- Confidence ratings for expected benefits (expected, confident, not expected)
- MoSCoW
- Strategy analysis
- Story telling
- Outcome focus
- Tracing requirements to business objectives
- 5 WHYs
- Elicitation techniques - document led analysis
- Customer Journeys
- Understand the business model of organisation (business architecture)
- Business Model Canvas
- Value Proposition Canvas
- V-Model
- Timebound Benefits
- Cost of delay
- Lead and Lag measures
- Data analysis / baselining of the current state / understand the problems / opportunities
- Ego management
- SARAH Curve / Emotional intelligence
- Translation, help the business to articulate the benefits
- Expectation management
- Sharing information / communication

- Acceptance criteria & UAT
- Benefits review
- Value Stream Maps

Exercise 3B: What has your organisation done to achieve successful or improved benefits management?

- New RACI of roles – focus on management especially in agile environment
- Product based structure
- Benefits owners over sponsors
- Benefits realisation plan
- Benefits realisation strategy
- Development of BM lifecycle embedded within change framework
- Clear work packages / clear expectations of outputs associated with BM
- Clear strategic alignment of projects
- Clear confidence ratings for benefits
- Benefit categorisation
- PMO benefit champions (initiation through to realisation)
- Involved tech BA role at the start - to help identify the feasibility
- Recognition of a lack of reviewing benefits
- Looking at performance and reporting across all projects
- Improving the data from projects to improve the ability to measure the benefits
- Reporting issues understood around achieving benefits realisation
- Use of benefits dependency network to highlight where business don't understand how the projects achieve the objects
- Post implementation review meetings
- Accountability/reporting on the benefit(s) to the board
- Tracking throughout the lifecycle
- Having a business case with clear financial information
- Templates to assist in benefits tracking/delivery
- Tracking of benefits inclusive of, at governance level
- BA as product owner
- Clarity on change manager / change lead attached to significant projects
- Accountability for benefits in BAU
- Creation of a benefit framework - provides a language, consistency across change initiatives
- Creation of a shared set of strategic benefits that are shared across change initiatives
- Talking openly about BM
- Lean canvas populated, highlighting the benefits
- Logging of the benefits
- Lessons Learned
- Benefits Management training but needs to be embedded amongst senior stakeholders
- Specialist Teams drop into projects to assist with Benefits Management