

Benefits management: Lost or found in translation



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KEYWORDS

- Benefits management/
Benefits realisation
management
- Translation
- Agile

Article Highlight:

This article looks at the spread of knowledge about benefits management and its adoption by organisations; the global development of benefits management; and translation processes at the organisation level.

What does the paper cover?

Benefits management first developed as a management idea in the early 1990s, largely to address the failure of many IT projects and programmes to deliver business value. Benefits management was pioneered largely in the English-speaking world, especially in the UK, Canada and Australia, in the context of the wider development of project management to incorporate programme and portfolio levels.

From the late 1990s, benefits management attracted the interest of government departments and professional bodies for both project management and IT. It became incorporated into guidance manuals and standards, initially in the English-speaking world, but increasingly on a global basis.

The mid-2000s onwards has seen the development of networks for best practice and maturity models for organisations to benchmark their progress against.

Professional standards

The current decade has seen the development of specialist qualifications in benefits management, encouraging the use of common standards and behaviours by practitioners. Practitioners who have achieved one of these qualifications often gain the status in their organisations as specialists in benefits management and can therefore be in a good place to champion the practice in the translation process.

Translation

Evidence on the translation into practice of benefits management has been hampered by the limited availability and type of literature on the subject. There are many studies on the incidence of benefits management practices, which suggest that they have spread globally but that the level of uptake is low, even in the countries where benefits management was pioneered. However, there are fewer studies on the processes leading to organisations adopting and embedding benefits management, or the factors preventing this happening.

Methodology:

The article's authors undertook literature reviews and drew on their own extensive practical experience. They used translation theory to analyse the development of benefits management and to draw conclusions about its current use.

Research findings:

- Evidence shows that using benefits management practices can increase the likelihood of projects and programmes achieving their goals.
- Uptake of these practices remains low across all countries covered by previous research, including the UK. The full potential benefits are often elusive even when practices are adopted.
- Focusing on benefits management could help to address the persistently high failure rate of projects and programmes.

The origins of benefits management come from two broad directions: appraisal of IT investments; and closing the gap between projects and organisational strategy. This has led to ambiguity on the scope and role of benefits management, which is not helped by the multiple meanings of the terms 'benefit' and 'value'. It means that those involved in the translation of benefits management need to work hard to understand the concept and contextualise it in a particular organisational setting, to give it coherence.

Implementation has also been hampered by organisations not appreciating the change management skills involved in successful translation. An underlying factor is the challenge that accepting accountability for the benefits realised from investment in change poses for organisations, including at senior levels.

Further research should be undertaken into:

- the knowledge and use of benefits management in organisations;
- the key factors leading to whether and how it is used;
- how benefits management is adapted for specific contexts, and whether there are common patterns in its use across an organisation;
- how it 'fits in' with other management practices in an organisation;
- whether or not organisations find it easy to commit to and embed it into their processes;
- the relationship between organisational cultures which emphasise value, and the use of benefits management.

Conclusions:

- Translation of benefits management practices is linked to other developments, such as the increasing emphasis on programmes and portfolios.
- Evidence on the translation of benefits management should be brought together with that from other developments in project management, such as agile. Insights from wider management theories, such as models of organisational learning, should also be drawn upon.

Significance of the research:

This article charts the development of benefits management from the 1990s up to the article's publication in 2015. It suggests that practitioners and researchers who want to promote benefits management should take the usefulness of translating it into practice as their starting point, taking account of the organisational context (the benefits of benefits management!).

Comments from author:

Writing at the beginning of 2018, it is useful to review developments since the article was prepared. As indicated in the article, all four authors are heavily involved in the translation of benefits management at a practical level, so we have used our research to seek to further that process. Examples include the APM Benefits Management Specific Interest Group event 'Benefits Management – a core theme in management research and education?' held in June 2016¹ and an article in *Project*, summer 2016, 'Friends with benefits'². In recent times we have seen a strengthening of the emphasis on benefits management in portfolio, programme and project management (P3M) guidance and standards, and more examples of good practice in the field, particularly in the public sector. However, there is less evidence that the mindset which optimises benefits (linking benefits and costs to arrive at the overall value of an investment in change) is becoming a corporate priority.

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¹ <https://www.apm.org.uk/news/benefits-management-a-core-theme-in-management-research-and-education-14th-june-2016-write-up-and-material-available>

² Available to APM members from <https://www.apm.org.uk/project>.

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Complete article

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Glossary:

Benefits management/Benefits realisation management:

the identification, definition, planning, tracking and realisation of business benefits.

Translation:

a concept for exploring knowledge transfer, such as the implementation of management ideas into organisational practice. Management ideas change as they are being translated across geographical space and over time.

Agile:

a method of project management that is flexible until the last stages of the project, continually adapting to new developments and needs.



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