NHS
Improvement

ACT Academy

Online library of Quality, Service Improvement and Redesign tools

Benefits realisation

collaboration   trust   respect   innovation   courage   compassion

Benefits realisation

What is it?

This is a tool to make sure you get the intended benefits planned for your project. Having a sound benefits realisation plan will improve the delivery of intended benefits, which also ensures that any resources allocated to the project are being fully utilised.

It will also help you when discussing with colleagues how your individual project is contributing to the overall service improvement programme.

When to use it

A benefits realisation plan should be a fundamental part of any improvement project, running from the project's beginning to its end.

How to use it

By focusing on benefits realisation planning, you can track whether intended benefits have been realised and sustained after the end of the project. Furthermore, it helps to ensure a clear signposting of who is responsible for the delivery of those benefits.

Where do I start?

The first step is to ensure all the foundations for benefits realisation are in place:

- Identify and make a record of the desired benefits. You may want to discuss this with stakeholders.
- Identify the stakeholders that will be affected by each identified benefit.
- Identify the outcomes and enablers required for each benefit realisation.
- Determine how you will measure whether a particular benefit has been realised. Ideally, try taking a baseline measure before the project starts and use this as a benchmark to determine realisation of the anticipated benefit.
- Allocate responsibility for delivery of these benefits.
- Prioritise the benefits so that the most important ones always have the most focus. This ensures the project makes the greatest impact.
- Identify dates for expected delivery of the benefits.

Creating a benefits realisation plan

To develop a benefits realisation plan, simply record the information gathered from carrying out all the above steps in a table (see example below). Store this plan with the other key project management work.

Figure 1: Benefits realisation plan

Desired benefit	Stakeholders impacted	Enablers required to realise benefit	Outcomes displayed if benefit realised	Current baseline measure	Who is responsible?	Target date

It is useful to order the benefits with the most important at the top; this helps you to focus on the benefits that will have the greatest impact.

Having created and updated the benefits realisation plan throughout the project, aim to revisit the plan at agreed review points once the project has been completed. This can help you decide whether the changes made are still delivering the desired benefits. If not, you need to consider corrective action.

If the original benefits are no longer being achieved, it could be that the project has stalled and lost momentum. If you think this is the case, the tools **revive a stalled effort** and **sustain momentum** may be of use.

To realise the full benefits in your plan, you may have to 'sell' your change project to key individuals to ensure proper buy-in. The benefits will only be realised if all parties are on board and working towards the same outcome.

Additional resources

Fraser, SW (2002) *Rolling Out Your Project: Thirty Five Tools for Health Care Improvers*, Kingsham Press