

# Benefit Mapping Methodology

## Why create a benefit map?

- The exercise of creating it may give you and your team a fresh perspective or a holistic view of your project
- The resultant map will help you communicate your project elements and ultimate benefits to a wide variety of stakeholders, and build support for it.
- It will bring you into collaboration with your users and customers
- You will develop measures that can be used post install to track the project success
- To test if the project is aligned to the organisations strategic initiatives
- To help you to compare different solutions to a problem
- To help you to focus on delivering value.

## Benefit map characteristics

What it is:	What it's not
<ul style="list-style-type: none"><li>• A communication tool</li><li>• A prediction of success</li><li>• A tracker for expected side effects (positive and negative)</li><li>• Shows the links between initiatives and outcomes</li><li>• A support for a business case</li></ul>	<ul style="list-style-type: none"><li>• A project plan</li><li>• A fixed view of benefits – it should be reviewed regularly, and amended as necessary</li><li>• A budgeting tool</li></ul>

In summary, move beyond 'installation mindset' to a 'realization mindset':

Installation	Realisation
Putting something new in place e.g install new email system (move from Lotus Notes to Microsoft Outlook)	Achieving the expected business results > 90% of staff are extremely satisfied with their email platform Staff are proficient with sending emails, booking meetings and managing tasks

## Benefit map elements:

- Benefits
- Disbenefits
- Assumptions
- Initiatives (activity)
- Outcome

- Metrics
  - Ultimate – lagging indicator
  - Intermediate – leading indicators

#### Benefit:

A benefit is something that is advantageous or good. Ideally you could associate an existing or a new metric with this advantage. This metric would allow you to determine when the benefit had been achieved.

For example, faster diagnosis of patients might be a possible benefit of digitizing a process involved in a diagnosis. This could be measured by the difference between the time the patient presents, and when a diagnosis is determined.

#### Disbenefit:

A disbenefit is something that is disadvantageous or bad, an undesirable side effect of an initiative. It might not be anticipated initially, but should not be ignored. For example, if digitizing the diagnosis process introduces a Data Protection breach and patient records are publically released.

#### Assumption:

An assumption is something that is taken for granted. These should be identified and surfaced, as it may not be fair assumption and may introduce a level of risk to the project.

#### Initiative:

An initiative is an introductory step, or series of steps, that give rise to outcome(s).

#### Outcome

The consequence of an initiative. It describes what is different post-initiative.

#### Metrics:

There are 2 kinds of metrics or measures used in Benefits mapping. The first is a leading indicator. This is an intermediate measure that tells us that we are going in the correct direction. The second is a lagging indicator. This tells us if we have reached our objective, but there may be some time before it can do that conclusively. The lagging indicator is more accurate, but the leading indicator, if it's effective, can give better feedback in real time. Leading indicators usually measure activity.

## Creating a benefits map.

Use the following layout to gather the elements of your benefits map:

# Benefits Map Template

Initiatives	Capabilities and assumptions	Benefits and Disbenefits	Metrics (lagging indicators)

Metrics (leading indicators)



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## Recommended steps to create a Benefit map:

Note:

- You should iterate through the steps below a number of times to get a complete picture.
- This may be better to do with a cross-functional team, rather than as a solo exercise.
- This is a living picture, and should be reviewed and updated on a regular basis
- Use the steps below to fill out the template

### Steps:

1. Begin with the primary benefit. If an existing metric exists that measures that benefit, write it in. Otherwise, try to identify a metric that will show that the benefit has been achieved.
2. Identify a possible initiative that will lead to the benefit. Multiple initiatives may need to be started to achieve the benefit. Are there any assumptions that need to be surfaced in relation to the initiatives listed?
3. What outcomes will be the consequence of the initiative? Enter each one, and as you do so, check if you are making any assumptions about the outcome.
4. Add any disbenefits that may ensue from these capabilities.
5. Add any metrics that measure activity around these capabilities.
6. Add arrows between the elements to show how they are connected.

Now, review the outcomes, and see if there are any additional benefits (see hints below) that may ensue from these capabilities. They may not all be evident initially, but any that you can identify at this point will

build support for this project. Loop through steps 1-6 to make sure that you have considered everything in relation to any additional benefits identified.

#### Benefits to consider: (helpful hints)

- Cost reduction of IT
- Higher reliability of IT services
- Reduced risk through increased capability
- Increased end customer satisfaction
- Increased employee satisfaction
- New services to customers (internal or external) enabled through increased IT capability, and the financial benefit from that to the organization
- Increased transaction speed thus allowing the organisation to process more transactions in a given period
- Error reduction
- Faster deployment of new services
- Any other priorities mentioned in the business strategy

#### Road testing your roadmap

Use the benefit map to explain to a benefit recipient what the project is about. Iterate through steps 1 to 6 above and detail each part.

Use the following questions to validate their understanding of the proposed work that leads to benefits. Do they understand what you are trying to do? Can they identify any disbenefits, additional benefits, unsurfaced assumptions? If so, add them. If they don't understand what you are trying to do, then you may need to try again.

#### Using your benefits map

Make sure that your project plan includes regular review of the benefits map, including a road test. Your project plan should also incorporate the leading indicators, to measure progress towards the benefits, as well as other standard project measures. Your measure of project success and completion should incorporate lagging indicators. On time and on budget are meaningless if the benefit are not achieved.