Throughout 2016, PMI, through the Global Executive Council, assembled a group of NextPerts—individuals who are rising stars in their organizations—to develop actionable techniques to address benefits realization management (BRM). The group focused on ways to identify, measure, deliver, and sustain benefits to ensure project-based strategic initiatives impact the business as intended.

The group identified the techniques on the following pages that can be adopted, adapted, and embedded into organizational routines.
Identify, Execute, and Sustain Benefits: Ways to Start a Movement in Your Organization

Taking a design thinking approach that develops solutions in line with customer experience, the process the group identified starts with a strong business case. This provides justification for creating a benefits-focused culture to quantify and calculate the need for a long-term view beyond the project. Forming a Benefits Thinking Movement within an organization can help establish organizational benefits capabilities that can be presented to the C-suite.

**Identify:** Consider the role of a Chief Benefits Officer (CBO) to set the policies, procedures, and measurement of benefits. This role could be fulfilled by an existing Chief Strategy Officer or EPMO equivalent. The governance body forms a Benefits Alliance that:
- Reviews the business cases for all strategic initiatives
- Approves the identified benefits and proposed measurement methods
- Drives benefits culture in collaboration with end-user business units

**Execute:** Use both an enterprise roadmap to anchor proven benefits management practices and common dashboard techniques to expand visual tracking/communication of project status beyond the fundamental budget, scope, and schedule parameters. These are useful methods to consider in charting a course through both project knowns and unknowns (see Benefits Iceberg).

**Sustain:** Establishing a Benefits Mindset starts with chief executives conveying that all projects in the portfolio must reflect strategy and track business benefits realized (see Mindset Shift). Incentivizing behavior of project teams to embrace this culture shift harnesses the core of a change capability in any organization. Continuing the work of the Benefits Alliance, periodic huddles between project teams and business units not only keep benefits targets on track, but also provides a means to sustain benefits (see Handshake Huddle).

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**Benefits Business Case**

- **Benefits Thinking**
  - Organization-level benefits focused thought process to extend a benefits-led culture

**Benefits Life Cycle**

- Includes organization-level drivers, guides, governance, and enables the initiative-level benefits life cycle

- **Benefits Recycling**
  - Continuous and final review of past initiatives to capture benefits and measurement approaches, and offers insights that could be recycled/reused in future initiatives

- **Benefits Linkages**
  - Aligns the benefits, evident to the organization’s established role and strategic initiatives

**Benefits Roadmap**

- Graphical depiction of the core phases of an organization’s benefits life cycle across the project portfolio

**Benefits Organization**

- Benefits are measured, communicated and benefits dashboard

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**Enabling**

- Benefits are transmuted for the remaining stakeholder groups

**Movement**

- The knowns and unknowns in the portfolio (visible and water) forces that can impact realization of benefits

**Learning**

- Benefits are learned with the necessary stakeholder groups

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**Problem Statement**

- Organizations need a way to clearly, easily and iteratively identify, communicate, and measure benefits..."
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