

Benefits   
Management

**Case Study 01**

Fictional Case Study

Central Technology Agency   
Information System Project

31.01.2024

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# Purpose

The Agency Information System Project (AIS Project) case study is the first in a series of case studies developed by the Digital Transformation Agency (DTA) for the purposes of demonstrating the requirements of the Benefits Management Policy (BMP) in the Digital Capability Assessment Process (DCAP) as they apply to investment proposals of varying complexity and size.

The case studies demonstrate one of many approaches that may or may not be suitable for all organisations and investments. Importantly, the benefits and measures presented here are illustrative and not intended to represent the level of rigour a real-life scenario commands.

# Introduction

The AIS Project case study details the requirements for agencies seeking full funding for a complex, tier 1 proposal. The BMP requirements are typically scaled to reflect the maturity of the investment approach. However, with no further budget comebacks planned, the Government has no opportunity to re-assess funding requirements so Central Technology Agency (CTA) must comply with all BMP requirements.

This document is in two parts:

* [**Part 1**](#_PART_1) discusses how CTA approaches benefits management   
  and develops benefits management artefacts for the DCAP.
* [**Part 2**](#_PART_2) provides the final Benefit Realisation Plan   
  (which includes all benefits management artefacts).

## The Investment

The CTA is bringing forward the new policy proposal (NPP), *AIS Project,* to implement a complex ICT system over the next seven years. At a proposed cost of $1.2 billion, with complex cross-agency dependencies and significant consequences for delivery failure, the DTA assesses the proposal as a **tier 1** investment.

## Requirements for Digital and ICT Investments Seeking Government Funding

As the investment proposal has a digital and ICT component, it is subject to the [Digital and ICT Investment Oversight Framework (IOF)](https://www.dta.gov.au/help-and-advice/digital-and-ict-investments/digital-and-ict-investment-oversight-framework-iof) and the [ICT Investment Approval Process (IIAP)](https://www.dta.gov.au/help-and-advice/digital-and-ict-investments/ict-investment-approval-process). This means the proposal is required to meet the requirements of the [DCAP](https://www.dta.gov.au/help-and-advice/digital-capability-assessment-process-dcap), including the new [BMP](https://www.dta.gov.au/sites/default/files/2024-01/BMP_V1_DTA.pdf), before it can proceed to Budget.

## Benefits Management Policy Requirements in the DCAP

At $1.2 billion, the NPP is considered a mega digital project. As projects of this size often experience delivery difficulties, the DTA will seek to ensure robust benefits planning, including clear articulation of benefits governance, measurement, and reporting arrangements, prior to recommending the proposal for funding approval. This is in addition to other requirements in the DCAP.

With no further opportunity to assess benefits management compliance via a future return to Cabinet, all benefits management artefacts must be fully finalised before the proposal is considered for endorsement by the DTA. Were the agency to review its investment approach and adopt a phased funding approach, with one or more returns to Cabinet as the solution is developed, the BMP requirements would be scaled to better reflect investment stage maturity.

However, as full funding is sought, the NPP must fully comply with all BMP criteria and CTA must provide the following artefacts as part of the DCAP before the proposal proceeds for Cabinet decision:

1. DCAP Criterion 8.1: Benefit or investment logic maps
2. DCAP Criterion 8.2: Individual benefit profiles
3. DCAP Criterion 8.3: Benefit governance planning
4. DCAP Criterion 8.4: A benefit realisation plan.

### Next Section

The next section describes how CTA develops its benefit management artefacts.

# Part 1 Benefits Management Planning

**Part 1**

# Planning the Benefits Management Approach

CTA’s benefits management approach has been developed with key stakeholders, including the relevant executive and business areas, the Business Change Management Team and the Project Management Team.

At CTA, Business Change Managers play a crucial role in benefits management[[1]](#footnote-2). With detailed knowledge of the business environment and direct business experience, they are responsible for defining the benefits (with the business and benefit owners); improving business operations to facilitate transition of project outputs into business operation; leading the activities associated with benefits realisation to ensure continued accrual of benefits can be achieved after programme / project completion; and assessing progress towards benefit realisation.

Benefits management planning is also closely integrated with project management planning at CTA as this provides project teams with a clear, high-level understanding of what the AIS project aims to achieve and how success will be measured.

## **Step 1:** The Benefits Realisation Plan (BRP)

After speaking to their assigned Investment Advisor at the DTA, CTA commences drafting the BRP. The CTA determines that the BRP will include all key benefits management artefacts required to satisfy the Benefits Management Policy requirements in the Digital Capability Assessment Process (DCAP).

The BRP is developed alongside the business case to ensure consistency; alongside the change management plan to ensure there is a clear plan for the realisation of benefits; and alongside the project management plan to ensure that delivery optimises the proposed benefits.

## **Step 2:** Investment Planning and Benefit Mapping Workshops

In the early investment planning stages, CTA’s Business Change Management Team hold workshops with key business stakeholders to explore the business problem and determine the benefits likely to accrue to CTA if the identified problems are fixed. A [preliminary investment logic map](#_Benefit_Maps) is drawn up and shows:

* The business problems
* The business outcomes that CTA would like to achieve from a solution
* The benefits to the organisation and its stakeholders if the problems were fixed, and
* The strategic objectives satisfied by the proposed benefits.

Workshop participants settle on three top-level benefits; namely:

1. Improve collaboration with customers and suppliers
2. Reduce IT expenditure
3. Improve staff productivity.

Once the benefits are identified, and benefit owners are nominated, further workshops are held with ICT teams and project teams to determine the scope of the project.

The ICT team has undertaken a discovery process and propose an IT solution that should address the problems and deliver the outcomes initially detailed in the investment logic map. The project teams, working with the Business Change Management Team, are confident that, with the right business changes to transition the project outputs into business operations, the proposed solution will deliver business outcomes that will eventually realise the proposed business benefits.

Benefit owners agree to each of the key benefits. As benefit owners need to be senior enough to be able to influence business change and own the impacted budgets, CTA has established that all benefit owners must be at least at the SES Band 1 level or above.

The Benefit Map (DCAP criterion 8.1)

Following on from the workshops, the Business Change Managers produce a [benefits map](#_Benefit_Maps), which is agreed by stakeholders and signed off by CTA’s Executive.

## **Step 3**: Individual Benefit Profiles

With agreement on benefits reached, the Business Change Managers engage the benefit owners to complete benefit profiles for each of the benefits. The SES Band 2 benefit owners delegate responsibility for the completion of the benefit profiles to the relevant business areas.

The benefit profiles are developed in consultation with financial and data reporting teams to ensure the metrics are evidence-based. CTA uses the standard [benefit profile template](https://architecture.digital.gov.au/benefits-management-guides-and-tools) supplied by the DTA. [Completed benefit profiles](#_Benefit_Profiles_(attn:) are included in the Benefit Realisation Plan (BRP).

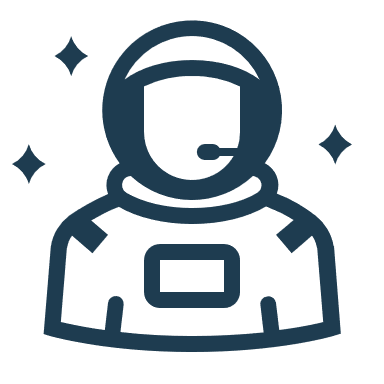
### Next Section:

The next section is the final BRP.

# PART 2 Benefit Realisation Plan

**Part 2**

The CTA provides the following BRP   
(and inclusions) to the DTA to satisfy the   
BMP assessment criteria in the DCAP.



**Case Study**

Central   
Technology   
Agency

Information System Project

# Benefit Realisation Plan (BRP)

January 2024

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## **Introduction**

## **Benefits**

## **Benefits Governance**

## **Benefit Realisation Planning**

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## Glossary

## Appendix

# Introduction

## Purpose of the BRP

The Centralised Technology Agency (CTA) is bringing forward a new policy proposal (NPP), *Agency Information System Project* (AIS Project), to implement a complex ICT system over the next seven years.

The purpose of the BRP is to summarise:

* how each identified business benefit will be realised before, during and after completion of the AIS Project
* who is accountable and responsible for benefits realisation
* the necessary changes in business practices, the role of the stakeholders involved, and the timeframe over which the business changes will be implemented
* how benefit realisation will be measured, monitored and reported.

The BRP draws on, and should be read in conjunction with, the final business case for the AIS Project and the Business Change Management Plan.

This document complies with CTA’s Benefit Management Strategy and Framework.

## Background to the Initiative

The AIS project will replace on-premise legacy technology with a scalable, modular, cloud-based technology platform. At a proposed cost of $1.2 billion, with complex cross-agency dependencies, the project will be delivered over a 7-year period. The Digital Transformation Agency (DTA) has assessed the project as a Tier 1 investment for assurance purposes.

The AIS Project will deliver the following outcomes:

1. Improved data and process integration
2. Better inter-agency collaboration
3. Improved upgrade and enhancement capability
4. Modernise the agency’s IT costing model.

The AIS Project will address key business problems and issues; namely;

* An outdated, on-premise technology platform hinders integration and modernisation
* Technology system updates are costly and cause widespread system disruption
* IT operating costs are regarded as excessive
* Inefficient business processes affect workforce productivity
* Clients and suppliers find the agency difficult to do business with.

## Strategic and Wider Government Objectives

### Data and Digital Government Strategy

Figure 1 demonstrates how the AIS Project’s proposed benefits are aligned with the agency’s strategic objectives and wider whole-of-government missions, as defined in the [Data and Digital Government Strategy](https://www.dataanddigital.gov.au/strategy/missions) (DDGS).

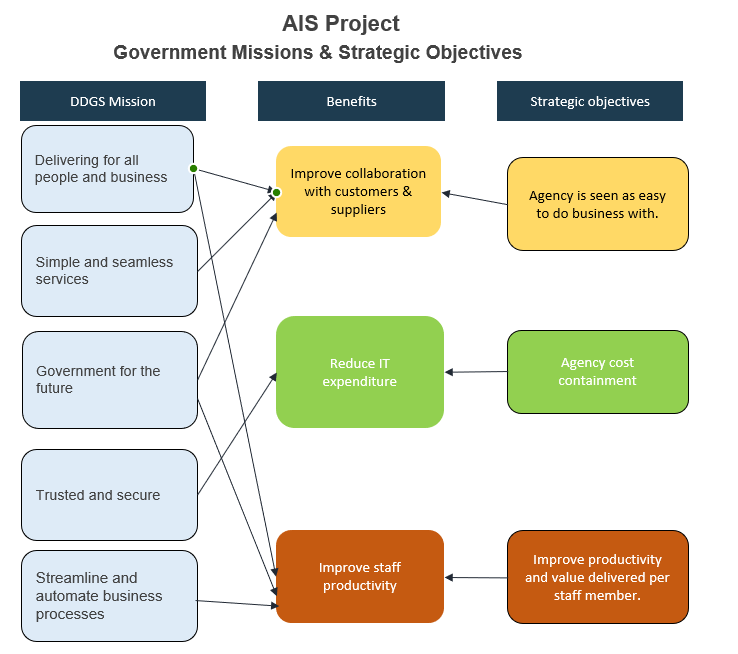


Figure : AIS Project: Benefits, the DDGS & Strategic Objectives

### Investment Prioritisation

The AIS Project was brought forward by CTA in the DTA’s Investment Prioritisation process and received a positive assessment and prioritisation score in the Digital Investment Overview (DIO), as follows:

*Agencies should include the DIO proposal summary and prioritisation score here.*

# 2. Benefits

## Methodology and Approach

This section summarises the methodology and approach to benefits realisation as described in CTA’s Enterprise Benefit Management Framework (EBMF) and Benefits Management Strategy Plan.

*This case study won’t summarise the methodology here but notes that these documents describe the organisation’s agreed approach to benefits identification, planning, measurement, realisation, reporting, evaluation and review. Any variations from agreed enterprise benefits realisation approaches should be noted here.*

## Benefit Identification

This section summarises the top-level benefits, as defined in the [attached benefit profiles](#_Benefit_Profiles_1) and described in the business case.

Top-level benefits are defined by the DTA as “the highest priority benefits that capture the intent of the investment and will provide the clearest evidence that an investment has achieved its stated aims”. The DTA requires tier 1 investments to supply between 1 and 5 top-level benefits so the AIS project is compliant in this respect.

Table : Summary of AIS Project Benefits

|  |  |  |  |
| --- | --- | --- | --- |
| Benefit ID | Benefit Title | Benefit Owner | Benefit Description |
| CTA-B-001 | Improve collaboration with customers and suppliers | X. Person  SES B2, Customer Service | Increased engagement and collaboration will improve negative perceptions of the agency amongst customers and suppliers. |
| CTA-B-002 | Reduce IT Expenditure | Y. Person  SES B1,  ICT Operations | The new system is expected to reduce the cost of in-house support and in-house software licensing costs. The IT costing model will change from a fixed IT costs model to a variable cost model, resulting in a target cost saving of 20-30%. |
| CTA-B-003 | Improve Staff Productivity | X. Person  SES B2, Customer Service | Enhanced system functionality will result in streamlined business processes which will improve staff productivity. |

## Benefit Assumptions

Table : AIS Project Benefit Assumptions

|  |  |
| --- | --- |
| Benefit | Benefit Assumptions |
| Improve collaboration with customers and suppliers | 1.1 Negative perceptions of the agency can be addressed by improved collaboration with suppliers and customers.  1.2 Customers and suppliers will increase their engagement if a suitable new IT system is put in place for this purpose.  1.3 A sufficient number of suppliers and customers will respond to periodic surveys. |
| Reduce IT Expenditure | 2.1 A scalable, cloud-based solution will reduce the cost of in-house IT support and on-premise software licensing costs.  2.2 Change from a fixed-cost IT model to a use-based, variable cost model will result in longer-term savings. |
| Improve Staff Productivity | 3.1 Enhanced IT functionality will facilitate business process re-engineering, reduce training requirements, and improve staff productivity. |

## Benefit Maps

For ease of reference, CTA has provided two benefit maps:

A diagram of a project

Description automatically generated*Figure 2: AIS Project Investment Logic Map*

1. The AIS Project Investment Logic Map (*Figure 2*) summarises the current business problems, the desired business outcomes, and the proposed benefits and related strategic objectives.
2. The AIS Project Benefit Dependency Network Map (*Figure 3*) links the key benefits and business and enabling changes upon which benefits realisation depends to CTA’s AIS Project outputs. It also summarises the measures for each benefit.

A diagram of a project

Description automatically generated  
  
  
Figure : AIS Project Benefit Dependency Network Map

Implementation of business and enabling changes will be managed by Business Change Managers, working closely with business and project teams to transition project outputs into business operations (see [Transition Management](#_Transition_Management)).

Benefit maps are live artefacts that will be updated by the Business Change Managers to reflect modifications to any of project outputs, benefits, or business and enabling changes.

## Benefit Profiles

Individual benefit profiles detail the project’s top-level benefits and articulate key, evidence-based benefit metrics, including baselines, targets, tolerances, and data and reporting sources.

Links to each individual benefit profile, which are located in [Appendix A](#_APPENDIX_A), are summarised in *Table 3* below, along with agreed measures and benefit owners.

Table : Individual Benefit Profiles

|  |  |  |  |
| --- | --- | --- | --- |
| Benefit | Owner | Profile Link] | Measures |
| Improve Collaboration with Customers and Suppliers | Name & Position | [*CTA-B-001*](#_Benefit_CTA-B-001) | ***Measure 1:***Active engagement  ***Measure 2:***Quality of customer/supplier interactions |
| Reduce IT Expenditure | Name & Position | [*CTA-B-002*](#_Benefit_CTA-B-002) | ***Measure 1:***IT Cost Indicator  ***Measure 2:***Workforce % using IT  activity-based costing. |
| Improve Staff Productivity | Name & Position | [*CTA-B-003*](#_Benefit_CTA-B-003) | ***Measure 1:***Gross Productivity  ***Measure 2:***Gross Lead Time |

## Benefit Analysis

This section discusses the risks to benefit realisation, benefit realisation confidence and benefit prioritisation.

### Risk Analysis

Risk management extends throughout the benefits realisation life cycle.

During the project phase, risk management activities will focus will on identifying and mitigating threats to optimising benefits, particularly in regard to project delivery issues (time and scope) as well as identifying opportunities to maximise benefits realisation.

Post-project transition, the risk management focus will shift to monitoring threats to benefit realisation, particularly in relation to:

* poor forecasting
* behavioural change
* unplanned disbenefits.

*Agency risk and mitigation strategies for benefits realisation should be tabled at this point using agreed agency risk management frameworks and approaches.*

### Benefit Realisation Confidence

*The benefit confidence level is summarised in the* [*benefit profile template*](#_Benefit_Profiles_1)*. This section should be updated to include benefit forecasts and confidence-related assessments.*

### Benefit Prioritisation

*Benefits may or may not be prioritised. Details of the prioritisation strategy and prioritised benefits should be included here.*

# Benefits Governance

Benefits governance focuses on how benefits realisation will be managed.

This section details the key governance structures, processes and roles that enable benefits realisation before, during and after project implementation. Specifically, this section addresses:

* who in the business owns the benefits and who will monitor benefits realisation during and post-implementation;
* how regular reviews of benefits realisation will be incorporated into existing governance mechanisms;
* who will regularly review benefits realisation progress, including beyond project delivery; and
* what benefit variation protocols, procedures and escalation pathways have been identified.

## Roles and Responsibilities

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Role | Responsibilities | Name and substantive position | Start Date | Finish Date |
| Senior Responsible Officer (SRO) | *Roles and responsibilities for  each position are detailed in the* [*Benefits Management Toolkit*](https://architecture.digital.gov.au/benefits-management-guides-and-tools) *and won’t be repeated here.* | tba | xx/yy/zz | xx/yy/zz |
| Project / Programme Manager | tba | xx/yy/zz | xx/yy/zz |
| Benefit Owner 1 | tba | xx/yy/zz | xx/yy/zz |
| Benefit Owner 2 | tba | xx/yy/zz | xx/yy/zz |
| Benefit Owner…. | tba | xx/yy/zz | xx/yy/zz |
| Business Change Manager 1 | tba | xx/yy/zz | xx/yy/zz |
| Business Change Manager 2 | tba | xx/yy/zz | xx/yy/zz |
| Business Change Manager… | tba | xx/yy/zz | xx/yy/zz |

Table : Benefits Realisation Roles & Responsibilities

These roles recognise that, while the SRO is accountable for an investment meeting its objectives and optimising benefits realisation, responsibility for benefits extends well beyond the life of the AIS Project and requires clearly definedbenefits ownership at the business level, including for all enabling and business changes required to realise the benefits.

## Governance Structures

This section describes how benefits management roles are situated within CTA’s organisational and project governance frameworks.

CTA’s governance diagrams demonstrate that the key benefits management and realisation roles identified in *Table 4* have sufficient authority and accountability to ensure benefits are realised.

Figure : CTA Project Governance Map

Figure :CTA Organisational Governance Map

## Benefits Realisation Reviews

This section summarises who is responsible for reviewing benefits realisation progress before, during and after project implementation.

The content and structure of these reviews is detailed in   
[Section 4F: Benefit Realisation Tracking and Reporting](#_Benefit_Realisation_Tracking).

*This section would typically summarise who is responsible for benefit realisation reviews before, during and after project implementation, as detailed in* *the Project Management Plan and the Business Change Management Plan.*

## Benefit Realisation Reporting

This section summarises who is responsible for monitoring, tracking and reporting benefits realisation progress before, during and after project implementation.

The content and structure of these reports is detailed in   
[Section 5: Benefits Evaluation](#_Benefits_Evaluation_&) and Review.

*This section would typically summarise reporting arrangements that are detailed in the Project Management Plan and the Business Change Management Plan, as well as any other executive level reporting requirements.*

## Benefit Variation Protocols and Escalation Pathways

This section establishes responsibility for benefit variation protocols and the escalation pathway for benefit-related issues before, during and after project implementation. It describes:

* the procedure for varying, removing or adding identified, intermediate, or emergent benefits
* the dispute resolution processes for benefits-related issues.

*This section would typically summarise variation and escalation protocols listed in the Project Management Plan and the Business Change Management Plan.*

# Benefit Realisation Planning

This section summarises how benefits will be managed through to realisation.

*Section 4 of the case study does not detail specific transition activities. Instead, it provides a suggested format for how CTA would present this information in the BRP. This section typically summarises benefits realisation and transition planning detailed in the Business Change Management Plan and the Project Management Plan.*

Items covered in this section include:

* benefit realisation summary
* benefit realisation timelines
* transition management
* benefit realisation tracking and reporting.

## Benefit Realisation Summary

This section tables the proposed benefits, enabling and business changes, expected business outcomes, realisation timeframes, baselines, targets, and benefit owners.

Table : Benefit Realisation Summary Table

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| ID | Benefit | Linked Project Output | Linked Business Outcome | Enabling Change | Business Change | Realisation Start Date | Realisation End Date | Baseline | Target |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |

## Benefit Realisation Timelines

This section provides a timeline for business transition activities and benefit realisation.

*This case study does not provide timelines for benefit realisation but instead provides an indicative (not to scale) timeline of the benefits realisation lifecycle for the AIS Project.*

Progress of each benefit through the realisation lifecycle, including timeframes for each associated business and enabling change, should be mapped against this timeline, noting it may be easier to map each benefit separately.

A diagram of a project

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Figure : Benefit Realisation Timeline (sample)

## Transition Management

This section discusses how the AIS Project will be transitioned into business operations. It summarises transition and post-transition arrangements.

### Transition Management

*This section summarises:*

* *who, how and when benefit artefacts are updated prior to business handover*
* *transition commencement*
* *formal handover processes*
* *change management processes involved in transition, including training and development, business process re-engineering and/or staff redeployment*
* *types of business support available during the transition*
* *behavioural change strategies to maximise benefit realisation*
* *communication strategies*
* *how business changes will be monitored*
* *how performance will be managed, particularly as staff adapt to new ways of working.*

### Post-transition Management

*This section summarises:*

* *how benefit forecasts are measured against actual performance*
* *how the success of new ways of working in achieving intended business outcomes, including unplanned outcomes, will be monitored and assessed*
* *the timeframe for removal of legacy business systems and procedures*
* *the process for documenting and sharing lessons learned.*

## Communication

*This section summarises:*

* *how information about benefits management is communicated before, during and after the project has been transitioned into business operations*
* *how communications will be sustained over the time period required to realise benefits, noting that benefits may not be realised for years after a project has closed.*

## Optimising Benefit Realisation

*This section details how CTA’s project, benefit owners and Business Change Managers will seek out, identify and capture:*

* *emergent benefits*
* *disbenefits.*

## Benefit Realisation Tracking and Reporting

*This section details how benefits realisation will be tracked and reported.*

# Benefits Evaluation and Review

*This section discusses how benefits will be reviewed and evaluated before, during and after the AIS Project is implemented.*

The purpose of benefit reviews is to ensure that:

* benefits continue to be achievable and represent value for money
* management, monitoring and evaluation arrangements are sufficient
* benefits realisation is effectively managed
* lessons learned are documented.

## Lessons Learned

This section details lessons learned from CTA’s previous investments and describes how these learnings have been incorporated into the AIS Project BRP.

|  |  |
| --- | --- |
| Lessons Learned from  Previous Investments | Incorporation into AIS  Project BRP & Processes |
| Benefits are measured routinely and are part of normal planning and reporting functions. They should not be regarded as an optional and stand-alone exercise. | The BRP details how benefits realisation is reported before, during and after project implementation and clearly details the role of the Business Change Management Team in managing benefits realisation. |
| Expected benefits should be linked to the strategic objectives of the agency. | The BRP details how benefits are linked to CTA’s strategic objectives and wider government digital and ICT objectives. |
| Responsibility for managing and delivering the benefits should be assigned to appropriate individuals/areas who are accountable for successful delivery and who are able to affect the outcome. | CTA has established that all benefit owners are at least SES Band 1 level and have sufficient authority to manage budgets, review staffing arrangements and champion business change. |

# Glossary

*This section would include a glossary of benefits management terms used at the CTA.*

# APPENDIX A

## Benefit Profiles

### Benefit CTA-B-001

### Benefit CTA-B-002

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### Benefit CTA-B-003

A screenshot of a computer

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**More Information**

For information about how the Benefits Management Policy applies to your proposal contact [investment@dta.gov.au](mailto:investment@dta.gov.au)

**Provide Feedback**

Agencies can provide feedback to the Benefits Management Taskforce by contacting [benefits.management@dta.gov.au](mailto:benefits.management@dta.gov.au)

1. Further information on the key roles and responsibilities for Benefits Realisation is available in the   
   [Benefits Management Toolkit](https://architecture.digital.gov.au/benefits-management-guides-and-tools). [↑](#footnote-ref-2)