Australian Government
Digital Transformation Agency

Benefit Profile Variation

Agency Guidance

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This factsheet has been designed for in-flight digital investments which are subject to the Benefits Management Policy (BMP). Its purpose is to support agencies in changing their baselined benefit profiles.

Note: Agencies that are seeking support in establishing a baseline as part of their business case or new policy proposal should contact investment@dta.gov.au.

What is a benefit profile?

A benefit profile is the document used to reach and record agreement (with the Benefit Owner) on the key details about a benefit (or disbenefit). This includes details such as categorisation, measures, calculation, baseline and target values, realisation dates and any assumptions, constraints and dependencies. It is a key benefits management artefact. It should align with the benefits information in the business case or new policy proposal.

Agencies first develop a benefit profile as part of the Digital Capability Assessment Process (DCAP) when bringing forward a business case or new policy proposal to the Digital Transformation Agency (DTA).

The DTA strongly encourages agencies to use the latest version of the DTA's benefit profile template, available on the AGA website: Benefits Management guides and tools | aga. The DTA is able to review the completed benefit profile template and provide advice on the agency's compliance with the BMP.

Once the benefit profile has been completed and approved by the Senior Responsible Official (SRO) and Benefit Owner(s), it is said to have been baselined. Formal approval will then be required to vary the baselined benefit profile, as it is a fundamental reference point.

What do I need to keep in mind?

A key challenge of benefits management is the ability to trace benefits realisation back to the investment decision (i.e. business case), which is critical in evaluating the success of an investment. To overcome this challenge, it is important to:

- get the benefit profiles baselined in a timely manner
- review the baselined profiles at critical milestones
- review the baselined profiles when there are changes to the project
- document any variations to the benefit profiles.

Changes may occur for several reasons including changes in project scope, changes to project schedule, and emerging risks and issues. When considering project changes, the impact on benefits must be considered. This requires benefit variations to be integrated into project governance mechanisms for appropriate consideration, buy-in and approval. For larger projects, governance arrangements are usually recorded within the Benefits Realisation Plan (BRP). The BRP should also define tolerance thresholds for benefits variances and appropriate escalation processes. If the variance is within tolerance, there is no need to submit a variation.

How do I vary a benefits baseline?

Investments can vary their baselined benefit profiles by updating their benefit profiles and seeking relevant approval. All benefit variations must, at a minimum, be signed off by the SRO and Benefit Owner(s). It is recommended that a copy of the new baselined benefit profiles are also tabled at the relevant project governance forum to ensure adequate visibility of the changes. Agencies are encouraged to comply with their agency's guidelines – if your agency has an Enterprise Project Management Office (EPMO) or Portfolio Management Office (PMO), you may wish to reach out to them for support.

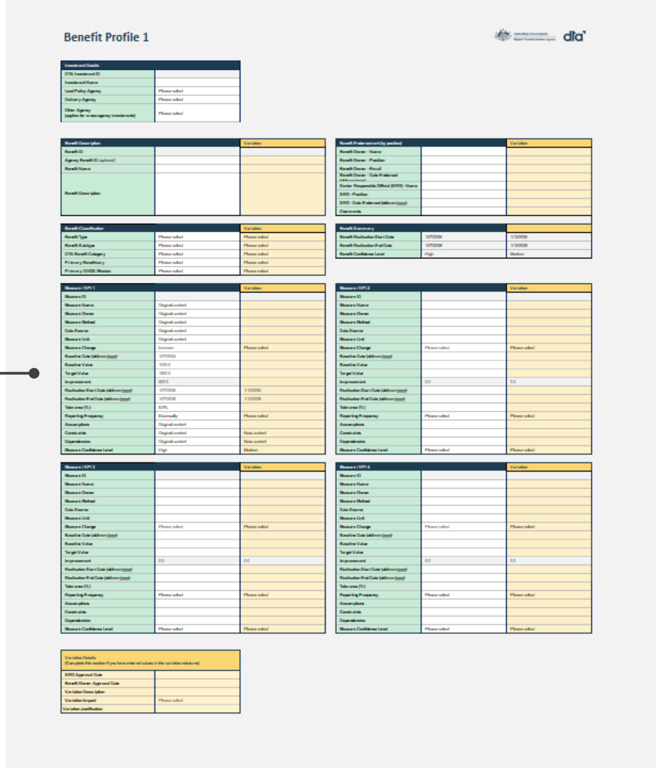
Updated benefit profiles should still demonstrate traceability back to the original business case. Agencies should consider how significant the impact of the change will be on the definition of success for the investment. For example, with the proposed changes will it still be possible to realise the full extent of the benefits committed to in the business case or new policy proposal? It is important that justification is provided for the change.

Template guidance

Benefit variations are completed in the yellow columns in the DTA's benefit profile template. If you are unable to see the yellow columns, please unhide the columns and record changes in the yellow columns. You only need to fill in a field in the variation column when there has been a variation.

DTA benefit profile template with variations recorded in the yellow column

Excel template example



Original details

Variations (Yellow section)

Measure / KPI 1		Variation
Measure ID		
Measure Name		
Measure Owner		
Measure Method		
Data Source		
Measure Unit		
Measure Change	Increase	
Baseline Date (*dd/mm/yyyy*)	1/07/2024	
Baseline Value	1000.0	
Target Value	1500.0	
Improvement	500.0	
Realisation Start Date (*dd/mm/yyyy*)	1/07/2026	1/12/2026
Realisation End Date (*dd/mm/yyyy*)	1/07/2028	1/12/2028
Tolerance (%)	5.0%	
Reporting Frequency	Biannually	
Assumptions		
Constraints		
Dependencies		
Measure Confidence Level	High	Medium

Variation details on the DTA benefit profile template

You will need to complete the variation details box at the bottom of each updated profile.

Excel example

Variation impact ratings

Low impact: The change is administrative or to improve existing benefit clarity. Benefit and measure(s) are unchanged. No change to definition of investment success. E.g. changing benefit category; small adjustment to the reporting frequency; new Benefit Owner from the same area; refining existing assumptions.

Medium impact: The change is a small adjustment to the benefit or measure(s) with no change to benefit intent or definition of investment success. E.g. changing benefit type from cash to non-cashable; new Benefit Owner from a new area; revised name/description; new measure method.

High impact: Change is a significant realignment of the benefit or measure(s) which clearly changes the intent of the benefit and potentially involves material change to the definition of investment success. E.g. removing or adding measures; decreasing benefit confidence; pushing back realisation dates; changing the fundamental nature of the benefit.

Variation Details (Complete this section if you have entered values in the variation columns)	
SRO Approval Date	
Benefit Owner Approval Date	
Variation Description	(What are you changing in this profile)
Variation Impact	(Low, Medium or High)
Variation Justification	(Why is this necessary and have the implications been considered in sufficient depth)

Can I vary a baseline which has already been varied?

Yes. The process is the same as above (i.e. completing the yellow variation column). Please ensure sufficient justification and approval is provided.

Template guidance

New variations can be overwritten over the top of variations already entered in the yellow variation column. Please ensure the yellow 'Variation details' box is updated in full. It is recommended that agencies save a copy of the original and varied profiles to assist with traceability and record-keeping.

What if I need to remove a benefit?

Proceed with caution if you are removing a benefit. Generally, removing a benefit is considered a highly significant change and would require considerable stakeholder consultation and governance approval within your agency. Consider whether the removal of this benefit affects the integrity of the business case and ensure sufficient justification is provided.

Template guidance

The original benefit can be left as-is. The yellow 'Variation details' box will need to be completed with the details of the benefit's removal.

Can I add a benefit?

Yes, it is possible to add benefits, including emergent benefits. This is generally considered a significant change and will likely require stakeholder consultation and governance approval within your agency. Keep in mind that the benefit profile is intended for top-level/key benefits only. A guide to the number of top-level benefits investments usually have is included in the Benefits Management Policy | aga. All top-level benefits will need to be monitored and reported on to the DTA.

Template guidance

Record the benefit on a new tab in Excel. The yellow 'Variation details' box will also need to be completed.

What else do I need to do?

Please provide the approved benefit profiles to portfolio.assurance@dta.gov.au.

Agencies should consider any flow-on impacts for the project and stakeholders. It is strongly recommended that agencies also review and update their BRP if required.

Contact & Feedback

Please contact us for additional assistance

In the first instance, in-flight agencies should contact their DTA Portfolio Managers for assistance via portfolio.assurance@dta.gov.au. DTA's Portfolio Managers will be able to triage requests as necessary.

Establishing a baseline

Agencies that are seeking support in establishing a baseline as part of their business case or new policy proposal should contact investment@dta.gov.au.

Agency feedback

The DTA values your feedback and ideas to help improve our processes and information. If you have any comments regarding this document, please share your thoughts with us:

benefits.management@dta.gov.au

Links mentioned in this document

Benefits Management Policy

Benefits Management guides and tools | aga