BUILDING THE CAPABILITY FOR BENEFITS REALISATION: LEADING WITH BENEFITS (6)

Colin Ashurst
Newcastle University Business School, colin.ashurst@ncl.ac.uk

Catherine Crowley
Maynooth University, catherine.crowley@nuim.ie

Clare Thornley
Maynooth University, clare.thornley@nuim.ie

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Colin Ashurst
Newcastle University Business School, Newcastle upon Tyne, UK
Email: colin.ashurst@ncl.ac.uk
Catherine Crowley
Innovation Value Institute, Maynooth University, Ireland
Email: catherine.crowley@nuim.ie
Clare Thornley
Innovation Value Institute, Maynooth University, Ireland
Email: clare.thornley@nuim.ie

Abstract

It is now 20 years since the publication of the paper that launched Benefits Management (BM), by Prof. John Ward and colleagues, and the launch of an open course on BM at Cranfield. This paper draws on recent work reflecting on the translation of BM into practice as well as a 10+ year programme of research seeking to understand how to develop the Benefits Realisation Capability of an organisation. In particular it draws on two longitudinal studies exploring the adoption of benefits-driven approaches. An important lesson is that BM needs to reflect a new mindset and is not simply another technique to add to our project management toolbox. Without a shift in mindset, BM becomes another technical, rational, approach that brings a new bureaucracy to the management of Information Technology (IT) investments when the need is speed to benefit. BM is primarily about people – about vision, engagement and motivation. It can contribute to the craft of leading change and help build an organisational change capability.

Key words: Benefits Management; Adoption; Capability; Leadership; Change; Benefits Realisation

1.0   Exploring the Adoption of Benefits-Driven Approaches

The paper draws on two recently completed longitudinal studies of the adoption of benefits-driven approaches to develop an organisational benefits realisation capability. It responds to both the continued challenges faced by organisations seeking to realise benefits from investment in Information Systems (IS) or IT and the limited prior research into the adoption of benefits-driven approaches.

2.0   Reflecting on a Growing Literature on Benefits Management

2.1   Foundations: a Growing Body of Work on Benefits from IS/IT

It is 20 years since Ward et al. (1996) shared some of the results of a programme of research into Benefits Management (BM) at Cranfield. That research provided valuable insights and resources building on engagement with a number of large organisations. The Cranfield work draws on a range of foundations, and has been developed and shared in a variety of formats (Ward and Murray, 2000; Murray et al., 2001; Ward and Daniel, 2006; Peppard et al., 2007; Ashurst et al., 2008; Doherty et

al., 2012; Ashurst 2012; Ashurst, 2015). A key principle of BM is that 'benefits arise when people do things differently' and so the essence of BM is active, business-owned and -led change (see Peppard et al. 2007). There is growing evidence (e.g. Braun et al. (2010) that BM contributes to benefits realization success.

A key emphasis of BM is that at a project level benefits are inherently contextual – concerned with changes in the specific context, not general issues of measurement of value (Ward and Daniel, 2006). The focus of this paper is specifically on BM and the role of change management in BM. As highlighted by Coombs (2015), effective BM is dependent on developing the skills for managing change.

A further vital foundation for BM is provided by Peppard (2007) who makes clear that the context is not the management of the IT function but the organisation-wide issue of management to realise value from IT. Key terms used in this paper are outlined in Table 1.

Competence	A 'firm's capacity to deploy resources, usually in combination, using organizational processes, to effect a desired end' Amit & Shoemaker, 1993, p. 35
Capability	Capability is a higher level construct than a competence (Stalk et al., 1992), defined and enacted through the application of a set of competences (Teece et al., 1997). More specifically, a capability can be defined as an organization's ability to 'perform a set of co-ordinated tasks, utilizing organizational resources, for the purposes of achieving a particular end result' (Helfat & Peteraf, 2003, p. 1000).
Practice	'A set of socially defined ways of doing things, in a specific domain, to achieve a defined – and generally measurable – outcome, and create the basis for responding appropriately to individual circumstances' Ashurst et al., 2008
Paradigm	'A paradigm is a self-consistent set of ideas and beliefs which acts as a filter, influencing how we perceive and how we make sense' Steel, 2000
Mindset	For the purposes of this paper we are using mindset in the same way as paradigm. Further work might explore any differences and relationship with practice.
Skill	Skill is used to indicate the competence of individuals rather than organisations. As with organisational competence we take this 'as the ability to do ..'

2.2   Changing Context for Benefits Management

There have been many changes affecting the context for benefits realisation in the 20 years since Ward et al. (1996). Efforts to gain competitive advantage from IT have moved from strategic information systems planning to a 4th era emphasising leveraging organisational capability (Peppard and Ward, 2004). Cloud technologies are enabling rapid shifts to new business models and business-driven transformation (Microsoft, 2015). Often this investment is owned and driven from outside IT. More generally, the flat world (Friedman, 2006) has become a VUCA world (volatility, uncertainty, complexity and ambiguity: Bennett and Lemoine, 2014) with leaders and organisations having to find ways to succeed in this new environment. In this context, can BM help organisations realise the vision set out by Earl and Khan (2001) of rapid cycles of business initiative-led IT?

2.3   Learning From Experience with Benefits Management

How has BM developed over 20 years of activity? A number of important themes emerge from recent papers on BM.

A portfolio management focus to BM is important (Breese, 2012), not least because the 'greatest gains come from doing the right things' (Earl and Feeny, 1994) and selection of the wrong projects is identified as a current issue by Lin and Pervan (2003). The portfolio perspective was part of the original Cranfield work, but was not the primary focus except in Murray et al. (2001) and can easily be neglected. Ashurst et al. (2009) provide some input on practices at a portfolio level and a portfolio perspective on competences for benefits realisation (Ashurst, 2012).

In practice, BM is 'generally undertaken within a modern paradigm' of management (Breese, 2012) which highlights factors including logic, linear thinking, reductionism, a split between thinking and doing. This potentially undermines the value of BM (Breese, 2012) for a complex business world where the assumptions of a modern, scientific paradigm can be irrelevant (Bennett and Lemoine, 2014). Is this a flaw in the nature of BM or does it reflect how it has been translated (Breese et al., 2014) and applied in practice?

This modern paradigm (Breese, 2012) and specifically a focus on measurement and control seems to be reflected in a range of BM research. As an example, the practices

used to define BM (Serra and Kunc, 2015: Table 2) focus primarily on measurement and miss the vital factor that BM is driven by a focus on managing change – which is then the source of benefits realisation. Without the emphasis on change, BM arguably reverts to a fairly basic attempt at IS/IT evaluation. The importance of broad participation (Paivarinta et al., 2007) can also get lost in the focus on logic and measurement. As Mohan et al. (2014) note: 'high bureaucracy reduces the effectiveness and flexibility of management practices by creating a vicious circle of formalised procedures' and this characterises the modern paradigm of BM in practice.

Breese et al. (2014) report low levels of adoption of BM despite increasing activity to translate the ideas into practice and practioner methods. They highlight some of the challenges in translating BM and note the importance of commitment to the underlying principles of BM and that this is reflected in the mindset and behaviours of the organisation.

2.4   Effective Translation into Practice?

Efforts to translate BM into practice include the special interest group (APM - the Association of Project Managers) established in 2009, which has grown to around 1300 members, and new qualifications in benefits management (APMG-International) (see Breese et al., 2014). However, despite these encouraging signs, adoption of BM remains low (Breese et al., 2014; Hesselmann and Mohan, 2014).

Recent practitioner literature provides further insight to help explore if the modern paradigm was built into BM or if it has emerged in translation. Much recent work seems to consider BM from a technical, rational perspective in the same way as many other IT and project methods. The emphasis is then on detail and bureaucracy – identifying every benefit and having measures and owners for every benefit (i.e. just a clear business case). The important elements of shaping the vision, building engagement of people, and focusing on a small set of well-chosen measures to help with the change process, are pushed into the background or lost entirely. For example in a summary of key elements of a benefits realisation plan, change seems to be a secondary issue (Matharu and Green, 2015: p71). Similarly Jenner (2014) seems to shift the focus away from change through collaboration to measurement (Jenner, 2014: e.g. Table B2 p.205 – see Benefits Realization Plan), and references to winning hearts and minds seem to be overwhelmed by the technocratic approach.

A review of core BM literature, specifically Ward and Daniel (2006) and the BM Best Practice Guidelines from Cranfield (Ward and Murray, 2000) suggests that the early work with BM was not affected by the issues with the modern paradigm highlighted by Breese (2012). Specifically there was a considerable emphasis on people to build engagement and to facilitate change. Table 2 provides evidence. A critical purpose of the BM tools is enabling creativity, encouraging collaboration and building commitment.

The benefit of using this chart (i.e. the table used for structuring benefits), like the network and portfolio, is in the discussion that occurs between managers. Real success is a workshop when everyone emerges with a shared understanding of what is being tackled. This is far more important than 'getting it right' and such agreements generate true ownership and even excitement about the possibilities'. (p34)
Well crafted benefits plans are probably the best way of: • Keeping the project business-owned and business-led. • Communicating the project and its aims. • Ensuring that all stakeholders have a chance of understanding and hence committing to new ways of working. (p39)
The benefit plan is 'a living document' which: • Details where necessary any significant change management actions. • Can be used to communicate the project and its rationale in terms of benefits. (p45)
From 'Do's and Don'ts': • Involve all known and potential stakeholders early in the determination of benefits. (P54)
Current State of Benefits Management • Benefits Management is a management philosophy applied to investments in IS/IT. It can also be successfully applied to other investments and change programmes • Benefits management is really structured common sense. (p55)

Table 2: Focus on People - Quotes from Benefits Management Best Practice Guidelines

Early work by Eason (1988) also counters the modern paradigm and the focus on upfront identification of benefits, for example: 'the exploitation of the capabilities of information technology can only be achieved by a progressive, planned form of evolutionary growth' (Doherty (2014: Proposition 9). Key principles include active management of benefits realisation (not just definition) and a change of mindset so that 'all stakeholders feel empowered to act in a more flexible and innovative manner' (Doherty 2014 – principles for benefits realisation 2 and 10). Remenyi et al. (1997)

take a similar position emphasising that their benefits process is based on an 'active participation and learning paradigm'. Overall, it appears that crucial elements of BM are being lost in translation in both research and practice.

3.0 Participatory Approach to Research

This research tackles the challenge of adoption of BM to develop the benefits realisation capability of the organisation. It responds to the need for further research into the translation and adoption of BM identified by Breese et al. (2014) and others. This paper draws primarily on the findings of two longitudinal research projects. Aspects of the methods for each project are included with the discussion of findings.

The overall goal of the research was to produce 'relevant and timely' research (Davenport and Markus, 1999: p20) and to 'produce knowledge about how to intervene in the world and change it in order to satisfy real-world needs'. Breu and Peppard (2003) make the case for a *participatory paradigm* for IS research where researchers conduct an *inquiry from the inside* together with the research subjects. The participatory paradigm links well with the fourth dimension of Management Information Systems (MIS) that is put forward by Lee (1999: p9) 'MIS researchers seek to *contribute* to the documentation, innovation, or illumination of better ways in which people in organisational contexts use, manage and maintain (in short 'instantiate') information technology'. From this perspective, as Ashurst (2010) notes, there is an opportunity to apply BM to the research itself to help focus on benefits for stakeholders. Given this overall strategy for the research, it was important to consider practitioner literature as well as academic publications.

One of the major limitations of much BM research is that there are so few expert practitioners who understand the real nature of BM and as a result research can be stuck in a rut of tackling the same issues yet again. For example as Paivarinta et al. (2007) report the participants in their Delphi study were not experts in BM. To help address this and contribute to the validity of this research, discussions have been held with five experienced users of BM now in senior consulting and business leadership roles to help review and evolve the analysis and findings. Their insights have been particularly important in evolving and testing out ideas and argument of this paper.

4.0   Findings

4.1   Action Research: Gaining Adoption of Benefits Practices

The first project was action research with a follow up study to establish a longitudinal perspective. The aim was to establish a benefits realization capability centred in the IT function at a Russell Group university (24 UK universities focused on research).

The benefits realisation capability of an organisation comprises four distinct, yet highly inter-related, competences (Ashurst et al., 2008). As each specific competence is supported by a *toolkit* of *practices* (Ashurst et al., 2008), we were very interested to explore how easy it would be to deploy these practices and build competences over a variety of IT projects, within a single organisation.

The main action research intervention, a series of 5 one-day workshops over a 6-month period took place in 2010. The 25 participants were from the IT function as well as the wider organisation and focused on stakeholders and project team members of 5 important projects. At each workshop, specific benefits tools (practices) were introduced and participants had the opportunity to apply the ideas to their projects with input and feedback from their colleagues. The focus of the intervention quickly broadened out from introducing BM practices, to a broader focus on leadership practices to help develop more creative, collaborative working to facilitate the use of BM.

In late summer 2013, building on the earlier work, six interviews, provided a longitudinal perspective on the continued adoption of benefits practices and the development of the benefits realisation capability at the university. The initial action research was discussed in Ashurst et al. (2011) and the follow up study providing the longitudinal perspective is discussed in Ashurst and Doherty (2014).

Practices Were Adopted and Found Valuable

Interviewees said that they had used key benefits practices and found them valuable: 'the key take home from 'benefits-led', was 'start with the end in mind' (Covey, 1990). We do all the good stuff and then construct a narrative around the good at the end. You can't because you haven't measured what you needed to measure. I start with the end in mind, thinking about what you are trying to say about the project. It's been a massive benefit' (P1Int1). There was also good evidence of sharing and adapting the practices. A second interviewee described how she had built on the

stakeholder analysis as the basis for developing a communications plan and was able to share this practice quickly with colleagues.

Overall 'benefits-led just seemed like structured common sense, which for me is a ringing endorsement. The good stuff does sound like structured common sense *after* you've heard it. People thought it was definitely useful' (P1Int1).

New Practices Contributed to a New Mindset
The workshop sessions introducing the benefits practices demonstrated creative and collaborative uses of the tools. The practices were positioned as ways of building engagement and commitment. This represented a very different way of working for most participants.

In 2013 interviewees suggested that the workshops and adoption of new practices had contributed to wider changes of mindset and understanding of their role for participants: 'I think for me that signals probably the first time that I was aware of as a department that we really started our relationship management. We weren't just getting people together to tell them about stuff, we were working with them' (P1Int2). The nature of what people understand as their job as an IT professional changed: 'I think through giving people opportunities to come out from behind their desk, their confidence has grown' (P1Int2).

The interaction found between practice and mindset is a potentially important in terms of adoption as it resulted in different behaviours. It supports the value of looking beyond a modern paradigm.

Failure to Follow Through and Build the Benefits Realisation Capability
Despite the positive results and the use of a number of elements of BM, the wider goals of the intervention were not fully achieved and the adoption of benefit practices were not embedded and sustained to establish a mature benefits realisation capability.

A number of factors were involved. Firstly, there was resistance at an individual level: 'benefits is largely about winning the political battle. A lot of people got into IT because they don't want to deal with politics' (P1Int2). Also the Project Management Office (PMO) established after the action research and taking on the adoption of benefits ended up with a focus on the delivery of a few large projects rather than the broader development of capability as it lacked the capacity to do both. This resulted in

the absence of any pressure to sustain adoption: 'it's just like anything in the university, there is no consequence of not doing it' (P1Int3). Finally, there was a loss of management focus as IT leadership were diverted by other political and improvement challenges (P1Int4).

4.2   Building the Capability for Benefits Realisation

The second research project involved follow up at Organisation C which was identified as successful in adopting a benefits-driven approach and realising benefits from IT-enabled change and transformation (Doherty et al., 2012). The case is also discussed in Ashurst (2008) and Ashurst (2012).

The initial research explored a 3-year transformation programme, which included a 'migration away from mainframe and in-house developed legacy systems and a move to best of breed 'off the shelf' applications' (presentation by P2Int3 in 2006). The transformation programme transitioned to business as usual, which included a major emphasis on continuous improvement. This was the focus of the second main phase of research interviews in 2013-14 (11 interviews). In terms of benefits realisation competences this was Benefits Exploitation, building on the outcomes of the original transformation programme and the benefits-driven approach to change and toolkit that was established. However, from a more micro perspective, very many smaller change projects took place during this period drawing on all the benefits realisation competences.

The objective of the follow up research was to understand how the approach to benefits realisation evolved and how the benefits realisation capability of the organisation developed.

The leadership for the transformation programme was also the leadership for the operational business area and as result there was a good degree of continuity of staffing. Even after 10 years many of the interviewees in the second phase had been part of the original team. This continuity of staffing helped maintain the change and improvement capability, which was one of the original design goals of the transformation programme. It also provided valuable insights from the research interviews.

Continued Realisation of Benefits

The transformation programme was an enabler of long-term benefits realization, for example (presentation Feb 2014):

- Net savings of £28m over 10 years.
- Housing Benefits: change in circumstance processing days improved from 74.41 days in 2005/6 to 25.7 days 2012/13.
- Council tax collection improved from 94% in 2005/6 to 97.1% in 2012/13.
- 89% of customer enquires resolved at first point of contact.
- Customer satisfaction rating 9.4 out of 10.

Benefits realisation continued during the continuous improvement period, for example new claims for housing benefits were processed in 18 days (2013) vs. 35+ days (2009). The scale of the improvement activity is significant: 'I've been involved in 50 improvement projects altogether' (P2Int8).

Continued Adoption of Benefits-Driven Practices

The individual business areas continued to adopt benefits-driven practices as an important element of their work on change and improvement. The organisation did not focus on a specific BM method, for example Lean tools had been widely adopted as part of the overall toolkit. The unifying principle of Lean and BM was the focus on enabling the teams to deliver value for the customer / stakeholders.

For example 'benefits review' is embedded in annual service planning and fortnightly team meetings. A number of other tools are used regularly: 'you have your toolkit and you just have a lot of things that you can draw on, and you use the appropriate tool for the appropriate task' (P2Int6). 'One of the basic tools we use a lot is the idea of a 'notice board', it shows all the data that the officers should know. We also use root cause analysis a lot and '5 whys' is a key tool' (P2Int6). Project and programme management also fed into the toolkit: 'we use risk, remember, as a tool of change. We trained loads of people in this' (P2Int4).

As managers move to take on responsibility for new areas or are involved in other ways, the same practices are adopted to start the processes of capability development in new areas of the organisation: 'I used the principles we applied from the start when I took over Registrars, which hadn't seen any change in 40 years. I'm going to use them again in bringing together the three front line teams for Leisure, Library and Customer Service. 'so it's one thing after another really, ideas are flowing' (P2Int2).

Major Emphasis on Using the Practices to Build Participation and Engagement
Building the capability for change and benefits realization was a core element of a move to a new style of management and leadership: 'we want and have leaders who innovate and change and excite people to get involved. We want a new leadership style and way of working. We redesign around the customer. I don't like working in any other way than with people facilitating people to change things. Change became the norm' (P2Int1).

There was extensive stakeholder involvement, with an explicit benefits focus, in each of the projects: 'we got people involved through training and communication. It generated a lot of excitement. It also saved a lot of problems as the users could see the potential pitfalls' (P2Int6)

The approach to benefits realization at the organization reflected the emphasis on creativity, collaboration and commitment noted in Table 2.

Development of Individual and Organisational Benefits Realisation Capability
The organisation addressed development of both individual and organisational capability. At the individual level recruitment and development were used purposefully to build desired capabilities. At an organisational level many dimensions of change including structures, practices and mindset contributed to capability development.

Alongside the emphasis on training and using benefits tools, the departmental structures were designed to support change, they: 'balance the use of specialist roles and embedding knowledge across the board. Managers know the value of leading change and they know how to do it – and in a way that can engage frontline staff' (i.e. were change-savvy) (P2Int4). As a senior manager noted 'I have a couple of what I call service support officers who work on the improvements, and they are trained in Lean although the management team are Lean experts, these two people work at it constantly, and it's worth investment in those roles because they can come up with the efficiencies that we need' (P2Int5).

Over the period of the transformation programme many of the supervisory staff developed process mapping and process design skills. This meant that the team could effectively run their own workshops rather than having them 'done to them' (P2Int3),

helping build morale as well as organizational competences. Crucially, this also meant that there was much deeper knowledge of the system and process within the team. In a similar vein, the Transformation Programme Director (P2Int4) saw one of his key roles as developing his teams' capacity for the management of change related to IT programmes, in general, but particularly strongly focused on their ability to deliver benefits.

'The lasting legacy is definitely the people who have the enthusiasm and energy for change and they actually know how to do it, and that's the difference. And that means that they're not constrained, they can do small and active change, they can do large change, and I think it's helped the organisation achieve the kind of dramatic savings that they've had to make, and I think it'll stand them in good stead going forward. ' (P2Int4)

There was also a continuous drive to improve the change capability (P2Int4):

- 'We need to be the best that we can be. When I ask: 'Do you think that we are the best that we can be?' The answer often comes back, no, and then the next question is, 'What conditions are in the way?''

- 'So there's a constant iterative awareness, self-awareness. 'Okay, when we started, we thought we could achieve *this*, but I think we can achieve *that* now. What do you think and how do you think we can get there?''

- 'It's really, really important, constantly challenging the change team to change.'

The adoption of Lean practices emphasises that the overall focus was building a shared leadership mindset, of change-savvy leaders engaging staff and continuing to develop the capabilities of individuals and the organisation to deliver value to the customer. The shared, benefits-oriented toolkit drew on many sources and was deeply embedded in practice.

5.0   Developing the Craft of Benefits Management
Drawing on the findings and the earlier literature review a number of areas are explored further.

This research provides evidence of broad adoption of practices (a toolkit) within an organisation and skilled use of them. A craft perspective (Doherty and Ashurst, 2012), drawing on Mintzberg (2009) and Sennet (2009) is valuable, emphasising the principle also made in the agile manifesto (Highsmith, 2004; Ashurst, 2011), that the

tools are there to help the people involved. There is a danger that as with other methods this gets lost and the objective simply becomes to follow the BM method.

5.1   Lost in Translation

While good progress in gaining adoption of BM is being made with new books, the APM SIG (special interest group) etc. the review of recent literature suggests Breese (2012) is right to be concerned that something important is missing or getting lost in translation (Breese et al., 2014).

To understand if there were flaws in the original work on BM or if the issues are more to do with translation we have revisited some of the early Cranfield work. Although only published in 2006, Benefits Management (Ward and Daniel, 2006) reflects the ideas developed in the early & mid 90's and communicated through the 2-day benefits management course at Cranfield (an open programme from 1996). Early understanding is also reflected in the Best Practice Guidelines (BMBP) (Ward and Murray, 2000) and the Advanced Benefits Management (ABM) research project (Murray et al., 2001). Crucially:

- The relevance of BM to all change initiatives and strategy implementation had been identified and BM was being used in this broader way (BMBP).
- The importance of the portfolio perspective was clear (ABM).
- It was known that other approaches might be required to get a clearer understanding of the problem and that it could be dangerous to take a waterfall approach and assume that objectives and requirements were clear. Murray for instance used soft systems to address this (ABM).
- The importance of people and engagement was clear with the tools used creative in workshops to explore a situation, better understand opportunities and develop a shared understanding (Ward and Daniel 2006: p259-62).

In too many contexts BM is being discussed from a very rational and technical perspective with the emphasis seemingly on identifying every benefit and ensuring there are measures, owners and timescales defined. In important cases (Jenner, 2014; Matharu and Green, 2015; Serra and Kunc, 2015) the core principal that benefits come from change seems to be lost in the emphasis on measurement of outcomes rather than leadership of change. This approach seems to make BM part of the problem (i.e. a technocratic approach focusing on technology implementation and measurement) rather than part of the solution i.e. a shift in mindset to a focus on active participation in change.

The two longitudinal research projects reported here provide evidence of a benefits-driven approach arguably more aligned to the original vision and more fit for purpose in a VUCA world.

The essence of BM has always been that it represents a new mindset and that crucially (i) this shifts the focus of activity to delivering benefits for stakeholders through change; (ii) it is a creative process designed to build engagement with stakeholders gaining their insights, commitment and contribution to benefits realisation and (iii) there is a strong emergent element to any significant change programme and it is foolish to assume that all benefits can be identified in advance. All these elements risk getting lost in the technical, rational approach being communicated, researched and adopted. What seems to be happening is that the language and tools are being adopted but the mindset and the focus on people and engagement is being lost, you might ay that, there is too much management and not enough leadership.

Taking a different perspective, this new mindset is vital if IT leaders are to be taken seriously as part of the top management team of an organisation and not side-lined by new roles such as the Chief Digital Officer and Chief Innovation Officer. Chatham and Sutton (2010) tackle this as a shift in leadership mindset from transactional to transformational. Peppard (2001, 2010) and Austin et al. (2009) also tackle aspects of this broader difference in approach to leadership.

5.2   Finding Our Way Again

To realise the potential contribution of BM to: benefits realisation from IT-enabled change; and successful delivery of change and strategy implementation, we need to rescue the movement from its slide into technocratic management. The insights from the two research projects summarised here are valuable in guiding this refocus.

Practices are for People

One of the key drivers for the use of practices for benefits management (Ashurst etc. al., 2008) was in response to the concerns raised by Nandhakumar and Avison (1999) that most IS methods are a 'necessary fiction' and do not reflect how work actually takes place. In part the practices represent 'boundary objects' and activities (Carlisle, 2002; Neilson, 2013) helping bring together diverse stakeholders and team members from different disciplines. The practices provide a common language (Grant, 1996)

helping stakeholders to work together. The boundary objects are typically artefacts, the output from the practices.

It is crucial to note that many tools (practices) can be used within different mindsets (paradigms). The key is a shift to benefits mindset (Ashurst et al, 2012; Ashurst 2012) and if this shift is made many existing practices (e.g. risk management) are very valuable for benefit delivery. A major risk is that the benefits tools are adopted but into the old mindset of technical, rational management of IT delivery. An obvious parallel is with PRINCE for project management. Done well, in appropriate projects, it provides a common language and a structure and aids project delivery. Done badly it results in valueless box-ticking. A key factor is 'craft' use of the tools in support of the goal of benefits realisation rather than use of the tools and production of specific outputs (often reports) for their own sake. See Table 3 for indications of what this can look like.

What does craft use of benefits tools look like? Examples from the interviews.
Select tools according to the context (e.g. the tools already in use by individuals / the organisation).
Adapt for your context (e.g. stakeholder map driving a communications plan).
Emphasise paradigm over specific practices
Introduce a tool to a colleague and coach them in using it.
Workshop approach – focus on workshops building engagement and collaboration with a few simple tools.
Using tools to enable creativity and learning about opportunities.
Using tools to find simplicity and clarity within complexity (e.g. a small number of customer focused measures).
Create 'mashups' – use specific benefits tools with other tools.
Bring a benefits mindset to existing tools (e.g. risk, lessons learned, phased delivery).
Balance simplicity and complexity. Be willing to keep learning. For example a benefit network is very hard to develop.
Innovative uses of tools (e.g. portfolio as insight into governance strategy).
Emphasise speed to benefits and creation of benefits over adherence to method.
Retain awareness of the bigger picture (e.g. systems thinking).

Table 3: Examples of Craft Use of Benefits Tools

Emphasise Building Vision and Commitment for Change
The BM approach is effective in the many situations including where the problem and goals are not initially clear. Tools such as driver analysis and work on the Benefits Dependency Network (BDN) (Ward and Daniel, 2006) can be used creatively to help clarify and build a vision.

Equally, a key purpose of the tools (stakeholder analysis, BDN etc.) is building engagement both of business and benefit owners and stakeholders. The core of the approach is well-facilitated workshops, for creativity, collaboration and engagement (Ward and Daniel, 2006). Evidence from the two longitudinal studies suggests development of these broader competences will be a key enabler of BM adoption and capability development. There is evidence from the work of Gemino et al. (2015) of the value of a 'social alignment' approach to knowledge management around projects e.g. an emphasis on common language. This supports the emphasis on BM as building engagement.

A rule-based approach focusing on identifying and measuring every benefit might appear appropriate but is in fact fundamentally flawed and is a perversion of the spirit of BM. As one participant noted: 'you can't fatten a pig by weighing it'. A more mature approach reflecting the craft of benefits management knows both that change is emergent and that measures drive behaviour, so that the vital element is a small set of clear, well communicated benefits and measures that will help build engagement and encourage change. Following Agile principles, later phases of exploitation can then pick up learning and capture further benefits. This approach is of course nothing new with Eason (1998) and Orlikowski (e.g. Orlikowski and Hoffman, 1997) as proponents. Organisation C demonstrates this mature approach emphasising emergence and learning.

Benefits Driven Change to Build a Change Capability
The two research projects viewed development of a benefits realisation capability (cf adoption of benefits management) as an organisational change. Models such as the change heptagon and change kaleidoscope are helpful in ensuring the target of change (structure, process, behaviour, values, etc.) and approach to change (top-down, bottom-up, etc.) are considered (Hope Hailey and Balogun, 2002; Ward and Elvin 1999). For example, development of the benefits capability involves shifting to a new

mindset as well as adoption of new practices. Both research projects reported here provide evidence that the introduction of new practices can contribute to the desired shift of mindset.

On the basis that a benefits approach can and should be used for any type of change, a benefits-driven approach is required to develop the benefits realisation capability. This should help ensure a holistic approach including a shift to a new mindset and not simply adoption of a new method. It also emphasises the need for active leadership for the change.

The research provides a case of an organisation taking this approach and successfully combining developing a benefits realisation capability with the on-going delivery of IT-enabled change. It also demonstrates the potential value of building a change capability deeply embedded in the organisation given the pervasive need for change at every level of an organisation (cf Peppard, 2007). Building this dynamic, change capability requires leadership and investment, so one starting point is to get clarity about the intended benefits of doing benefits management and then to gradually build the capability.

Change Savvy Business Leadership
We have known from the beginning that BM can be used for a wide variety of change initiatives not just IT-enabled change (Ward and Murray, 2000). The research provides a case study of an organisation that has embedded the capability for project and change management on a broad basis through the organisation. In a sense this builds on IT savvy leadership (Weill and Ross, 2009) to demonstrate 'change-savvy leadership'. In this case the tools have been used in the context of a clear set of leadership principles, which focus on people (staff and customers) and investment in the development of the capability of individuals and teams.

Used in this way BM can provide a contribution to leadership for a VUCA world where change and uncertainty are norms (Bennett and Lemoine, 2014) and practices are responsive and flexible. Embedding the change capability through the organisation reflects the need to focus on value from IT, not management of the IT function (Peppard, 2007) and also encourages a focus on business change and improvement as the starting point for investments, which seems to be the right context for planning IT initiatives.

5.3 Looking to the Future

Acknowledging a strong sense of déjà vu in that many of the themes discussed in this were implicit (and explicit) in the work of pioneers such as Eason and Ward, learning from the research is summarised in a new manifesto for BM which tries to recapture its essence as a new mindset and as a leadership and organisational capability and fight it getting lost in translation into another technocratic method. See Table 4.

A New Manifesto for Benefits Management
1. The biggest gains come from doing the right things: strategic portfolio management is a vital element of the benefits capability
2. Performance only improves when people do things differently: the essence of a benefits approach is leadership of change.
3. Manage benefits over the lifecycle of an investment.
4. Work creatively and collaboratively building commitment to change. Benefits come from motivated teams and stakeholder management.
5. Invest in developing individual and organisational capabilities.
6. Development of a benefits realisation capability is itself an organisational change and requires a benefits-driven approach.

Table 4: A New Manifesto for a Benefits Management

6.0 Conclusions

This paper makes an important contribution by responding to recent calls for research into the adoption of BM and the development of a benefits realisation capability. The results of two long-term, longitudinal studies provide important insights into successful adoption of benefits-driven approaches to change.

Implications for Practice

Future efforts to develop and gain adoption of BM to help organisations with change initiatives and strategy implementation, including IT-enabled change need to emphasise BM as a new mindset and a core element of change-savvy leadership.

Further drift to become a technical, rationalist method will consign BM to decay in the world of IT and other technocratic methods rather than making a valuable contribution to developing IT and business leadership which can inspire and manage change.

Priorities for Future Research

To help BM to 'cross the chasm' to become accepted as central to change-savvy management and leadership, future research should consider (i) BM in relation to

dynamic capabilities and also (ii) explore how the principles and practices of design thinking might be relevant to a new, holistic approach to systems thinking and benefits-driven change. Work to develop a (iii) portfolio perspective on building the benefits capability is also important and Daniel et al. (2014) provide a valuable starting point. A major priority is research that might establish more evidence and guidance on a (iv) benefits-driven approach to building a benefits capability. Hesselmann and Kunal (2014) provide one starting point.

From a project perspective, the work of Sauer and Reich (2009) on rethinking IT project management is particularly relevant and further work here might help refocus the adoption of BM by the project community. Future researchers should be aware that advanced use of BM might become 'how we do things round here' so BM becomes hidden. Lack of focus on formality and method is not necessarily lack of adoption.

The main limitation of this paper that we want to highlight is that the fieldwork for the two research projects was primarily at project and programme level and that consequently crucial portfolio management issues are not reflected. Ashurst and Doherty (2009) specifically address portfolio management practices but not development of portfolio aspects of the benefits realisation capability. In addition we have not explored the potential differences between mindset and paradigm or wider sources of insight into the relationship of paradigm with practice.

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