APMG Managing Benefits Foundation and Practitioner Training

Duration: **5 Day**

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Managing Benefits provides managers and practitioners from a wide range of disciplines with a structured approach for improving the value organisations gain from investments in change.

The course introduces generally applicable principles, practices, and techniques for identifying, evaluating, planning, realising, and reviewing benefits in a more consistent and effective way.

The programme covers both **Foundation** and **Practitioner** levels. The Foundation component develops an understanding of the terminology, principles, practices, roles, responsibilities, documentation, and Benefits Management Cycle. The Practitioner component focuses on applying and adapting that knowledge within different organisational and scenario-based situations.

Exams and Assessments

Managing Benefits Foundation Examination

The Foundation examination is taken **after lunch on Day 3**.

- 50 multiple-choice questions
- 40 minutes
- Closed book
- Minimum of 25 correct answers required
- Pass mark: 50%

Participants must pass the Foundation examination before they can proceed to the Practitioner examination.

Managing Benefits Practitioner Examination

The Practitioner examination is taken during the **afternoon of the final day**.

- 80 multiple-choice questions
- 2.5 hours
- Open book
- Minimum of 40 correct answers required
- Pass mark: 50%

Successful candidates receive their results and certificate electronically through their personal APMG account.

Participants must bring **valid photographic identification**, such as a passport, driving licence, or workplace ID, on both examination days. Failure to provide acceptable identification may prevent a candidate from sitting the examination.

Prerequisites

There are no formal prerequisites for attending the course. However, participants are expected to have some familiarity with the basic concepts and terminology used in business change.

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What You Will Learn

Foundation Level

The Foundation element is designed to help participants understand the core principles, practices, techniques, roles, responsibilities, and documentation associated with benefits management.

Participants will be able to:

- Explain the definitions, scope, and objectives of benefits management.
- Recognise common barriers to effective benefits management and the characteristics associated with successful practice.
- Understand the principles that support effective benefits management.
- Describe the five practices within the Benefits Management Cycle and the techniques associated with each one.
- Understand the key elements of portfolio-based benefits management.
- Identify the main benefits management roles, responsibilities, and typical documentation.
- Understand different approaches to implementation and the factors involved in sustaining progress.

Practitioner Level

The Practitioner element focuses on applying and tailoring Managing Benefits within different organisational contexts.

Participants will be able to:

- Plan the implementation of benefits management and choose suitable strategies for measuring and sustaining progress.
- Select and adapt principles, practices, and techniques to different organisational environments.
- Apply the activities associated with each stage of the Benefits Management Cycle together with relevant role accountabilities.
- Evaluate examples of benefits management information and documentation.
- Analyse solutions used within a given scenario and assess their suitability.

Training Outline

Foundation Section

Module 1: Overview – What Is Benefits Management?

This module introduces the terminology used in Managing Benefits and explains what is meant by benefits and benefits management.

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It also reviews:

- The track record of change initiatives in delivering expected benefits
- Cognitive biases that can influence benefits management
- The main objectives of benefits management

Module 2: The Benefits Management Principles

This module explores the seven principles that provide the foundation for effective benefits management:

- Align benefits with strategy
- Start with the end in mind
- Utilise successful delivery methods
- Integrate benefits with performance management
- Manage benefits from a portfolio perspective
- Apply effective governance
- Develop a value culture

Module 3: The Benefits Management Cycle

Participants are introduced to the Benefits Management Cycle and the organisational environment in which it operates.

The module also covers:

- Barriers to effective benefits management
- Key Success Characteristics
- Main roles and responsibilities
- Core benefits management documentation

The following five modules then examine each practice within the cycle in greater detail.

Module 4: Benefits Management Practice 1 – Identify & Quantify

The purpose of this practice is to establish a sound basis for options analysis, investment appraisal, and portfolio prioritisation.

Topics include:

- Benefits discovery workshops
- Benefits mapping
- Customer insight
- Benefits forecasting
- Common problems and appropriate responses

Module 5: Benefits Management Practice 2 – Value & Appraise

Once benefits have been identified and quantified, the course considers how they can be valued and assessed.

Topics include:

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- Why organisations express benefits in monetary terms
- Approaches to valuing non-financial benefits
- Cost-benefit analysis
- Real options
- Cost-effectiveness
- Multi-criteria analysis
- Value management techniques

Module 6: Benefits Management Practice 3 – Plan

This module focuses on planning for successful benefits realisation.

Topics include:

- Benefits validation
- Benefits prioritisation
- Managing the pre-transition phase
- Selecting benefits measures
- Benefits risk and opportunity management
- Planning stakeholder engagement
- Initiative-level benefits management documentation
- Responsibility for preparing and maintaining key documents

Module 7: Benefits Management Practice 4 – Realize

Benefits rarely occur automatically, so active management is required.

This module considers:

- Transition management
- Tracking and reporting
- Surveys
- Effective stakeholder engagement
- Supporting the behavioural change on which benefits realisation often depends

Module 8: Benefits Management Practice 5 – Review

The final practice examines the importance of review as a mechanism for organisational learning and continuous improvement.

Review activities may take place before, during, and after a change initiative.

Module 9: Portfolio-Based Application of Benefits Management

This module explores why portfolio-level benefits management is important and reviews its main elements.

Module 10: Implementing and Sustaining Progress

Effective benefits management needs to become part of the organisation's culture.

This module considers:

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- How to begin implementing benefits management
- How to sustain progress
- Measuring organisational impact
- Assessing benefits management maturity

Practitioner Section

Module 1: Practitioner Exam Overview

This module explains the structure and expected content of the Practitioner examination.

Participants work through typical questions as a group and discuss the different styles of questions that may appear.

Module 2: Applying the Benefits Management Principles

The seven principles introduced at Foundation level are applied to practical scenarios.

Participants analyse both appropriate and inappropriate uses of the principles in different situations.

The principles are:

- Align benefits with strategy
- Start with the end in mind
- Utilise successful delivery methods
- Integrate benefits with performance management
- Manage benefits from a portfolio perspective
- Apply effective governance
- Develop a value culture

Module 3: Benefits Management Practice 1 – Identify & Quantify

Participants apply approaches for identifying and quantifying benefits.

Topics include:

- Benefits discovery workshops
- Benefits mapping
- Customer insight
- Benefits forecasting
- Common problems, issues, and fallacies
- Suitable responses and solutions

Module 4: Benefits Management Practice 2 – Value & Appraise

This module examines how benefits are valued and initiatives assessed.

Participants work with:

- Monetary valuation
- Valuation of non-financial benefits

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- Cost-benefit analysis
- Real options
- Cost-effectiveness
- Multi-criteria analysis
- Value management techniques

Practical exercises are used to reinforce the application of these techniques.

Module 5: Benefits Management Practice 3 – Plan

Participants examine the planning activities required for successful benefits realisation.

Topics include:

- Benefits validation
- Prioritisation
- Pre-transition management
- Benefits measures
- Risk and opportunity management
- Stakeholder engagement
- Benefits management documentation
- Relevant roles and responsibilities

Module 6: Benefits Management Practice 4 – Realize

This module focuses on the activities needed to support successful benefits realisation.

Topics include:

- Transition management
- Tracking and reporting
- Surveys
- Stakeholder engagement
- Behavioural change

Module 7: Benefits Management Practice 5 – Review

Participants examine the use of review as a basis for learning and continuous improvement before, during, and after an initiative.

Module 8: Portfolio-Based Application of Benefits Management

The portfolio-based application of benefits management is explored in greater depth.

The portfolio is considered as a permanent organisational function that manages benefits before and after change initiatives and evaluates both individual and collective performance.

Module 9: Implementing and Sustaining Progress

The final module considers how benefits management can be embedded into organisational culture.

Topics include:

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- Starting implementation
- Sustaining progress
- Measuring impact
- Assessing maturity

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