BCS Professional Certificate in Benefits Planning and Realisation Training

Duration: **3 Day**

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Overview

The **BCS Professional Certificate in Benefits Planning and Realisation** is a three-day specialist course designed to help Business Analysts understand the lifecycle, activities and techniques used to define, plan, manage and realise business benefits.

Successful business change is not achieved simply by delivering a new process, system or solution. The expected benefits must be identified in advance, assigned to appropriate owners, made measurable and then monitored to determine whether they are actually realised following implementation. Benefits management is therefore an important capability for Business Analysts working across the business change lifecycle.

The course explores the organisational context of benefits management, the **benefits management lifecycle**, the **Benefits Dependency Network**, business case development, investment appraisal, stakeholder and change management, and the implementation and monitoring of benefits.

New course content continues until approximately the middle of the afternoon on day three, with the **BCS Professional Certificate in Benefits Planning and Realisation** examination taking place later that day.

Participants should also plan to spend approximately **one to two hours each evening** on revision, homework and other activities set by the instructor.

Prerequisites

It is recommended that participants have knowledge equivalent to:

- The **BCS International Diploma in Business Analysis**, or
- The **BCS Solutions Development Diploma**

before attending.

An understanding of projects and change management activities is useful, although it is not mandatory.

This three-day specialist programme leads to the **BCS Professional Certificate in Benefits Planning and Realisation**.

Using This Certificate Towards the BCS Advanced Diploma

This course is one of the professional certificate options that can contribute towards the **BCS Advanced Diploma in Business Analysis**.

Candidates intending to work towards the Advanced Diploma must already hold the **BCS International Diploma in Business Analysis**.

In general, the Advanced Diploma requires candidates to:

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- Gain certifications in four subject areas covering three skill domains
- Provide evidence of at least five years of Business Analysis experience
- Demonstrate active engagement with the Business Analysis community

Who Should Attend

The course is relevant to professionals who want to understand the processes and techniques used to plan, manage and realise the benefits expected from business change initiatives.

It is particularly suitable for:

- Business Analysts
- Project Managers
- Programme Managers
- Business Managers
- Professionals involved in benefits management
- Candidates progressing towards the BCS Advanced Diploma in Business Analysis

Those using this certificate as part of the Advanced Diploma pathway must already hold the**BCS International Diploma in Business Analysis**.

What You Will Learn

By the end of the course, participants will be able to:

- Explain the organisational context for benefits management.
- Define a structured benefits management lifecycle.
- Identify business and organisational drivers.
- Identify and classify business benefits.
- Construct a Benefits Dependency Network.
- Develop a business case.
- Carry out an investment appraisal.
- Relate risk assessment to the business case.
- Explain why stakeholder and change management are essential to benefits realisation.
- Identify the tasks required to implement a benefits management approach.
- Understand the roles of benefit owners and change owners.
- Monitor and evaluate the realisation of benefits.
- Anticipate future issues associated with benefits management.

Outline

1. The Context for Benefits Management

The opening section examines why benefits management is necessary and the problems it is designed to address.

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- Common issues with IT delivery and benefits realisation
- Reasons expected benefits may fail to materialise
- Characteristics of an effective benefits management approach
- Value propositions
- Value chains
- Connecting change investment with organisational value

This section reinforces the distinction between delivering a solution and actually realising the expected business value from that solution.

2. The Benefits Management Lifecycle

Participants explore the complete lifecycle for managing benefits.

Identify and Structure Benefits

- Identifying expected benefits
- Structuring benefits
- Considering benefit ownership

Plan Benefits Realisation

- Planning how benefits will be achieved
- Identifying the changes required
- Defining measurement and monitoring approaches

Execute the Benefits Plan

- Implementing planned changes
- Monitoring benefit realisation
- Managing responsibilities

Review and Evaluate Results

- Measuring realised benefits
- Comparing outcomes with expectations
- Reviewing and learning from results

Establish the Potential for Further Benefits

- Identifying additional benefit opportunities
- Considering benefits not originally anticipated
- Supporting ongoing benefits management

3. The Benefits Dependency Network

This section focuses on connecting organisational drivers, investment objectives, business changes and expected benefits.

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Why — Business and Organisational Drivers

- Identifying organisational needs
- Analysing the drivers for change
- Connecting benefits with strategic objectives

Investment Objectives

- Defining the objectives of the investment
- Relating those objectives to the wider business rationale

What — Business Benefits and Owners

- Defining expected business benefits
- Identifying benefit owners
- Clarifying accountability

How — The Benefits Dependency Network

- Mapping dependencies between change and benefits
- Linking investment objectives to realised business outcomes

4. Building the Business Case

Participants examine how benefits management supports a robust investment decision.

- Purpose and rationale of the business case
- Analysing and describing different types of benefits:
  - Observable
  - Measurable
  - Quantifiable
  - Financial
- Investment appraisal
- Risk assessment
- Completing the business case
- Balancing benefits, costs and risks

5. Stakeholders and Change Management

Benefits can only be realised when people and organisations adopt the required changes.

Topics include:

- Achieving benefits with stakeholders
- Tools for stakeholder assessment
- Change owners and benefit owners
- Understanding resistance to change
- Change management strategies
- Connecting adoption of change with benefits realisation

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6. Implementing the Benefits Management Approach

The final subject area considers how benefits management can become an embedded organisational practice.

- The benefits-driven approach
- Benefits management roles
- Allocating responsibilities
- Planning and facilitating workshops
- Benefits review activities
- Monitoring realised benefits
- Identifying further benefits
- Ongoing benefit monitoring
- Continual review and improvement