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| **Benefits Management Plan** **UAT Development**  |
| **2022** **Author/Directorate**  |
| **Document Reference:**  |

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| **Cover Sheet** |
| **Prepared By** |

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| **Name**  |  |
| **Signature**  |  |
| **Email**  |  | **Phone:**  |  |

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| **Manager / Project Manager** |
| Staff managing projects must have training and /or skills that match he demands of the project level. All projects as a minimum should be managed by a project manager who has achieved competencies at the Certificate IV in Project Management level or holds equivalent knowledge and experience.   |

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| **Name**  |  |
| **Signature**  |  |
| **Email**  |  | **Phone:**  |  |

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| **Endorsed by Project Sponsor (Deputy Secretary or Deputy Commissioner)** |

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| **Name**  |  |
| **Signature**  |  |
| **Email**  |  | **Phone:**  |  |

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| **Endorsed by Senior Supplier / Asset Custodian** |

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| **Name**  |  |
| **Signature**  |  |
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| **Endorsed by Asset Owner**  |

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| **Stakeholder Endorsement**  |

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| **Name:**  | **Signature:**  | **Department:**  | **Date**  |
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| **PCG Endorsement** |

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| **PCG** | **Date** | **Minutes Doc Reference** |
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| **Version Control**  |

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| **Version #**  | **Doc Reference**  | **Author**  | **Comments**  | **Date**  |
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|  | **1. Introduction** |  |
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| Write a brief introduction so any reader could answer the following questions:* How did the project originate and what’s its purpose?
* How and when was the investment logic (the problem, the strategic intervention, and the projected benefits) decided.
* What are the projected benefits and who will decide if they were realised after the project closes?
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|  | **2. Document purpose** |  |
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| The Benefits Management Plan sets out the approach that the UAT Development Project will use to manage the realization and delivery of benefits.It provides direction and information in terms of:* the approach taken to benefits planning, which includes how benefits were identified and defined.
* the approach to be taken for benefits realisation management.
* the functions, roles, and responsibilities of those involved in benefits planning and realisation.
* when and how reviews and assessments concerned with measuring benefit realisation will be carried out, and who will be involved.
* measurement methods and steps that will be used to monitor and assess the realisation of benefits.
* the tool/s, system/s and source/s of information that may be used to enable benefit measurement.
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|  | **3. Stakeholder agreement and responsibilities** |  |
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|  | In this section, cover those who need to agree to the plan or particular elements of it.  The table below is an example only.  |  |
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| **Benefits-related role** | **Job title** | **Project role** | **Description** |
| e.g., Benefits owner | e.g., Executive Director | e.g., Project Sponsor | e.g., Accountable for ensuring benefits are realised from the outputs delivered |
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|  | **4. Approach taken** |  |
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|  | Briefly describe the process used to derive the expected benefits from investing in the project, e.g.:* How were the benefits decided initially, e.g., via an investment logic workshop?
* Who was involved in the process?
* How were the benefits documented, e.g., in an Investment Logic Map (recommended)
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|  | **5. Benefit Map** |  |
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|  | The following Benefits Map illustrates the relationships between the outputs (deliverables) produced by the project; the business changes that are needed to take on the new capability; and the benefits (intermediate and end benefits) that are anticipated to be realised because of those outcomes. The boxes and arrows have been prepopulated for use as an example.  Amend as necessary for the project (including adding additional boxes). |  |
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|  | **6. Benefit Profiles - Measuring the benefits** |  |
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|  | The Benefits Plan expands upon the information provided in the Business Case.  Refer to the Benefits identified in section 2.3 of the Business Case.Table 1: Benefits and KPIs measurement |  |
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| **Benefit Name**  | **Type of Benefit**  | **Dependencies to achieving benefit**  | **Risks to achieving benefit**  | **KPI Descriptions (List All)**  | **KPI Baselines (List All)**  | **KPI Targets (List All)**  | **Person/people responsible**  | **Has the benefit been achieved at the end of the project** |
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|  | **7. Tracking and reporting benefits** |  |
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|  | Use this section to summarize the schedule for reporting on benefits, for example:* When will you start reporting from? e.g. When will the benefits begin to be realised? When are they expected to be fully realised?
* What’s the schedule for reporting on progress and delivery of KPIs and benefits? (You may need separate tables for each benefit if the reporting responsibilities and schedule differ in each case.)
* There is an example format for reporting on individual benefits and KPIs below and in 0.)

Benefit delivery will be tracked throughout the project as part of monthly or quarterly status reporting.  The information in the status report will advise if the delivery of the expected benefit is on track or not.  Risks to delivering expected benefits will be managed and reported with project delivery risks.Table 2: Benefits and KPIs reporting schedule and responsibilities |  |
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| Reporting  |
| **Forum**     | Where will the KPIs and benefits be reported on?  |
| **Start date**  | When will the reporting start? (dd/mm/yyyy)  |
| **Frequency**  | How frequently will it be reported (pre and post-implementation, monthly, quarterly, annually, etc.)  |
| **End date**  | When will reporting finish? (dd/mm/yyyy)  |
| **Responsibility for reporting** **Name** **Position**    |  |

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|  | **8. Post project benefits review** |  |
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|  | Use this section to indicate the intended method for reporting on the benefits after implementation. The department representative, not the Project Manager, should provide final benefit reviews for Benefits Owner review. Briefly cover who will compile the review, when, and what resources may be needed. |  |
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|  | **9. Issues to consider** |  |
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|  | Include this section where relevant, for example:* Have there been changes to the benefits or KPIs outlined in the original Business Case?
* How will the project deal with the prospect of a benefit not tracking to target or at risk of not being achieved, i.e. what are the risk and issues management processes regarding projected benefits?
* Are any new initiatives needed to correct any benefits that are not meeting targets?
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