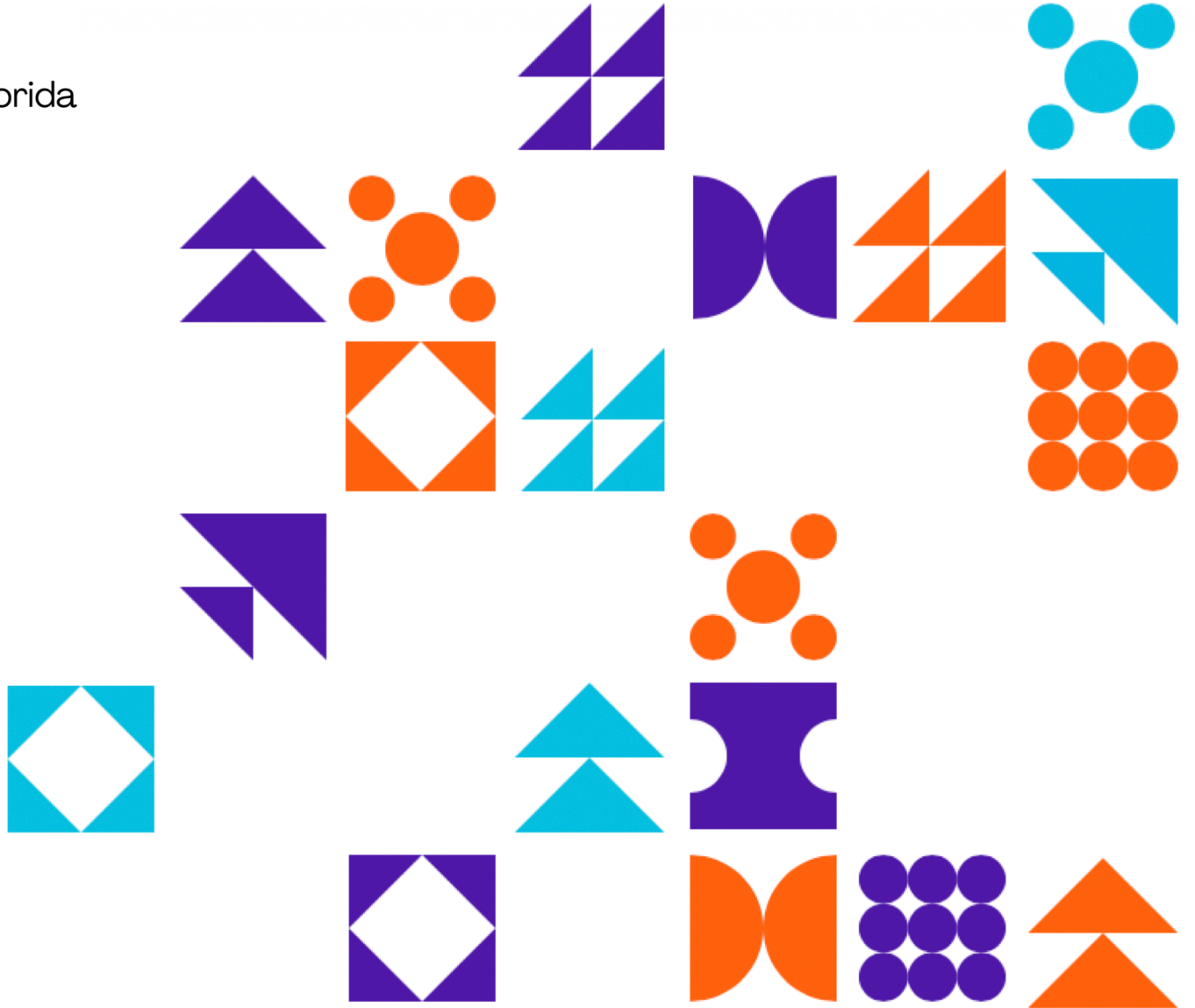


MAXIMIZING YOUR BENEFITS REALIZATION WITH ORGANIZATIONAL CHANGE

Presented by PMI Tallahassee Chapter's
Joanne Gallagher and Rebecca Green

July 31, 2021



Presenters: Joanne Gallagher

Joanne Gallagher, PMP, HCS is a Sr. Managing Director at Cambria Solutions. She is a seasoned management consulting executive with a proven record of improving programs through organizational change management and benefits realization in over a dozen states. As a solution specialist, Joanne is adept at improving government business process, program, and technology areas required to support successful delivery. She is an innovative thinker and is adept at developing strong alignment of a vision to results-oriented, successful outcomes. She excels at developing and delivering complex projects and is passionate about serving the public. Joanne holds a Bachelor's degree in Psychology/Criminology and an Honors degree in Legal Studies, Carleton University, Ottawa, Ontario Canada. She lives in Tallahassee, Florida. Joanne is the VP of Professional Development for the PMI Tallahassee Chapter.

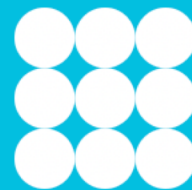


Presenters: Rebecca Green

Rebecca Green joined State of Florida government in 2008, working in Information Technology for state agencies as both a project and contract manager and handling numerous high-profile state enterprise endeavors. In 2015, Rebecca was part of the Florida Agency for State Technology team that developed Florida's Project Management (PM) administrative rule, guidelines, and other state PM standards in order to meet legislative mandate. Since 2017, Rebecca has worked in the private sector for globally-recognized companies including SAS and NTT Data Services providing project management for enterprise information technology implementations at state agencies in Florida, Vermont, and Nebraska. As part of those efforts, she has spent considerable time developing Benefits Realization Management plans and work products to exceed the needs of state and other customers. Rebecca received her PMP certification in 2014 and earned SAFe 5.0 Scrum Master Certification in 2021. Rebecca is a Certified Professional Public Buyer, Certified Public Manager, and a graduate of Florida State University with her Bachelor's Degree in Public Administration. Rebecca is the VP of Communications for the PMI Tallahassee Chapter.



WHAT IS BENEFITS
REALIZATION
MANAGEMENT?



Introduction

It's increasingly difficult in today's fast-paced, technology-focused world to maintain and demonstrate that the benefits expected from a project are realized. Too often, project's shift direction due to complications, and maintaining the project's schedule or cost become all-consuming.

This presentation focuses on the techniques and practices in organizational change management that can support and enhance benefits realization and ensure alignment with your corporate strategy.

Quick Poll

How many of you have been involved in Benefits Realization Management work in the past?

- I've been directly involved in Benefits Realization Management work in some capacity in the past.
- None of the projects I've worked on have held any element of Benefits Realization Management.



Quick Poll

How many of you have seen challenges with projects due to the business objectives/critical success factors not being measured accurately enough?

- I've witnessed at least one project experience challenges due to poor measurement or monitoring of business objectives/critical success factors.
- I can't imagine a project not going perfectly!



Benefits?

Defining a project's benefits, the value that project stakeholders will realize from a project being completed, can be a daunting task. Having a plan that defines these benefits, outlines how the benefits will be measured during the project's lifecycle, and details how a benefit will be maintained after a project's go-live is critical.

Further, visualizing the roadmap showing when and how a benefit will be realized or received by the project's stakeholders via tracking tools such as a benefits register is an integral part of the process of demonstrating a project's VALUE.

“Benefit realizations should always be owned by stakeholders who are expecting Value from an investment.” – (Manish Panchmatia 2016)

Categorization of Benefits

During the planning phase of a project, the project team and stakeholders should identify the project's expected benefits.

Each expected benefit should be further assessed to determine what classifications will be attributed to it, what key performance indicators and measurements will be established for each benefit, and the criteria or methodology necessary to complete these ongoing measurements, similar to the fields below.

Benefit ID	Benefit	Beneficiary	How will the Benefit be Realized?	KPIs/ Measurement
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Solution Component	Expected Realization Phase	Business Value Owner	% of Achievement	Mitigation Needs?	Categorization of Benefit (Tangible, Intangible)
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Categorization of Benefit (Financial, Non-Financial)	Categorization of Benefit (Planned, Emergent)	Lessons Learned / Notes
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Tangibility of Benefits

- **Is a benefit a tangible one?**

- Can it be physically held, viewed, or monetarily documented?
 - Is it a defined savings in costs or an increase in revenue received?
 - Is it a defined increase in productivity or efficiency? i.e. can you show a greater quantity of products produced by the same number of resources within a timeframe?

- **Is a benefit an intangible one?**

- Can it be NOT BE physically held, viewed, or quantitatively documented?
 - Does the benefit represent a perception by stakeholders or customer of an increased company leadership position or ‘better user experience’?
 - Does the benefit represent a perception by employees of an increased company morale and level of job satisfaction?

Financial Classification of Benefits

- **Is a benefit a financial one?**

- Can it be documented from a monetary standpoint?
 - Is it a defined savings in costs?
 - Is it a defined increase in revenue/profits received?

- **Is a benefit a non-financial one?**

- Can it be NOT BE documented from a monetary standpoint?
 - Does the benefit represent reductions in disciplinary actions or accident rates?
 - Does the benefit represent a perception by employees of an increased company morale and level of job satisfaction?

Planned Benefits

- **Is a benefit a planned one?**

- Was the benefit planned from the project's initiation/planning phases forward?
 - Was one of the main objectives of the project to reduce costs for producing a product?

- **Is a benefit an emergent one?**

- Did the benefit unexpectedly emerge during the course of the project?
 - Did the process put in place to reduce costs for producing a product inadvertently result in a process efficiency that makes employees happier to perform their job?

Measuring the Benefits

How do you track and measure a benefit to show that it's performing as it should?
You use DATA!

Each benefit should have metrics and Key Performance Indicators (KPIs) identified for it to demonstrate how it will be measured during the lifecycle of the benefit (from identification of the benefit to realization of the benefit).

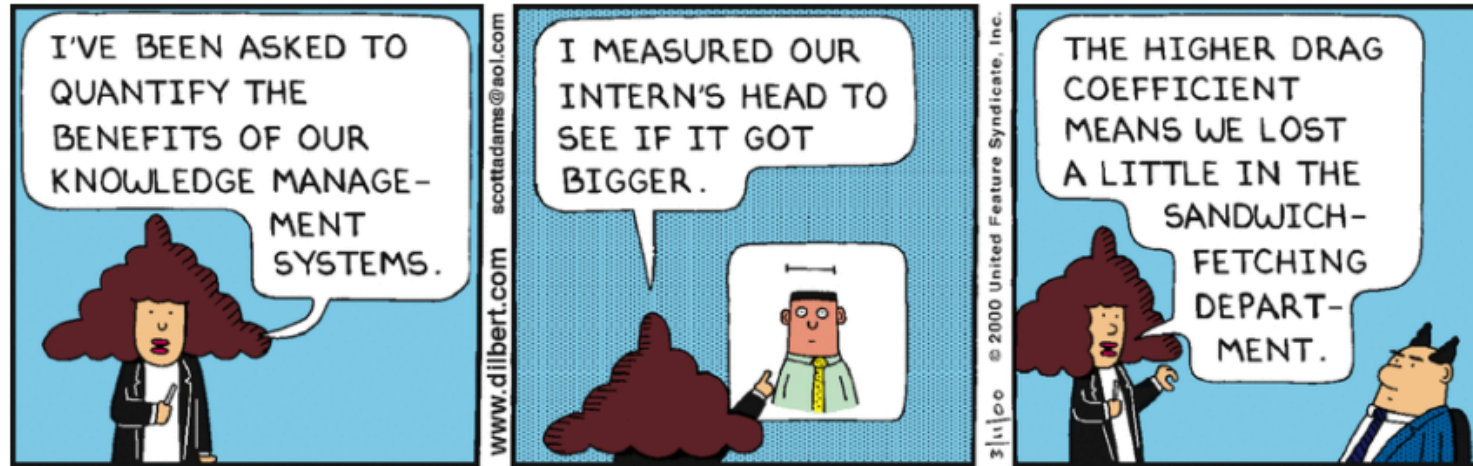
Metrics for a benefit might include performance (load/stress) testing reports, time that it takes a user to complete coding tasks on a monitored basis, how many resources are required to produce a product, or administrative hours to complete reporting tasks.

The data gathered during measurement is used to quantify whether a benefit is on track for realization. If trend lines detail that a benefit is not on track for realization, course corrections in the project should be made to bring the benefit back into line.

Communicating the Benefits Realization Progress

Once you have your data, it's equally critical to communicate the progress out to stakeholders based on your pre-defined communication plan.

Having stakeholders involved in the process ensures that everyone is diligently watching the project as it progresses and optimizes the reaction time to adjust things should trends start to indicate progress below baselines.



Quick Poll

How mature would you say the organizational change management is where you work?

- We have consistently mature organizational change management practices where I work, and those practices are routinely discussed and monitored.
- We adhere to good organizational change practices in the office with some of our projects.
- We occasionally talk about organizational change management and the goals we need to make in order to bring this into standard practice.
- What are we changing?



What is Organizational Change Management?

“The process, tools and techniques to manage the people side of change to achieve the required business results”

Organizational Change Management and Benefits Management

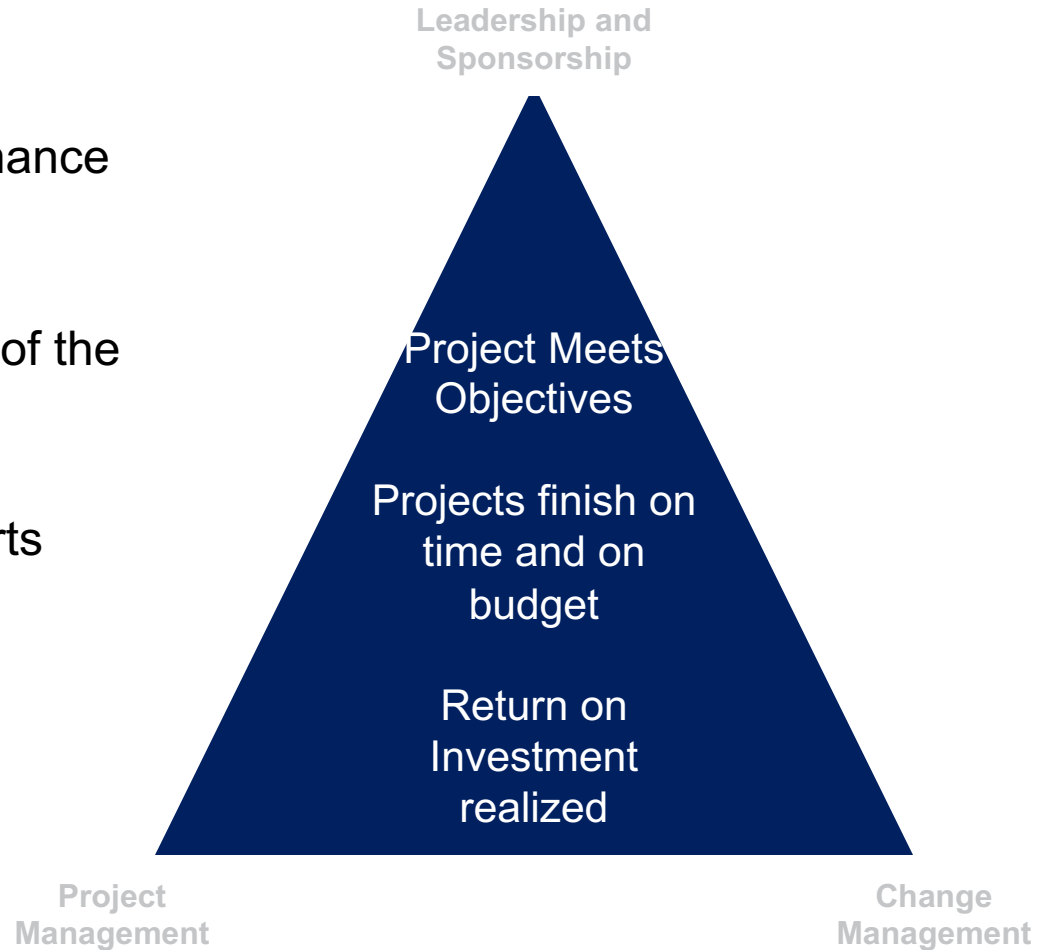
- **Defining the roles involved in Benefits Realization Management**
 - Who are the stakeholders?
 - Have the stakeholders been prioritized?
 - Who's accountable for achieving intended benefits?

Change Model in Benefits' Realization

Leadership / Sponsorship
provides guidance and governance

Project Management gives
structure to the technical side of the
change

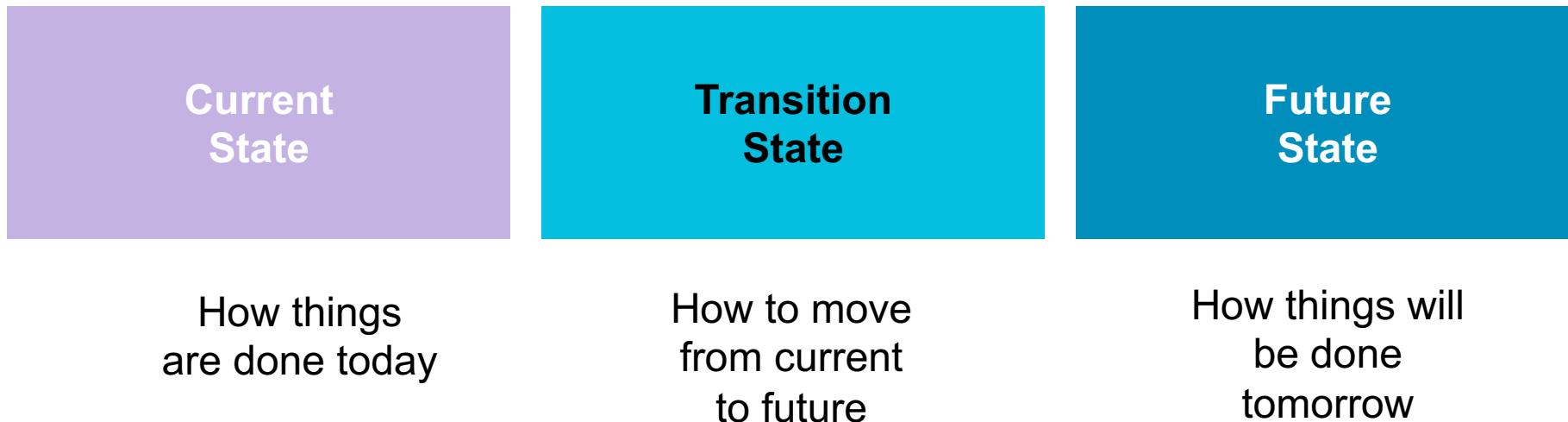
Change Management supports
the people side of the change



All three elements must be present for project success

The Three Stages of Organizational Change Management in Benefits' Realization

States of benefits' realization change



The Three Stages of Organizational Change Management in Benefits' Realization (cont'd)

Typically we take an organizational perspective

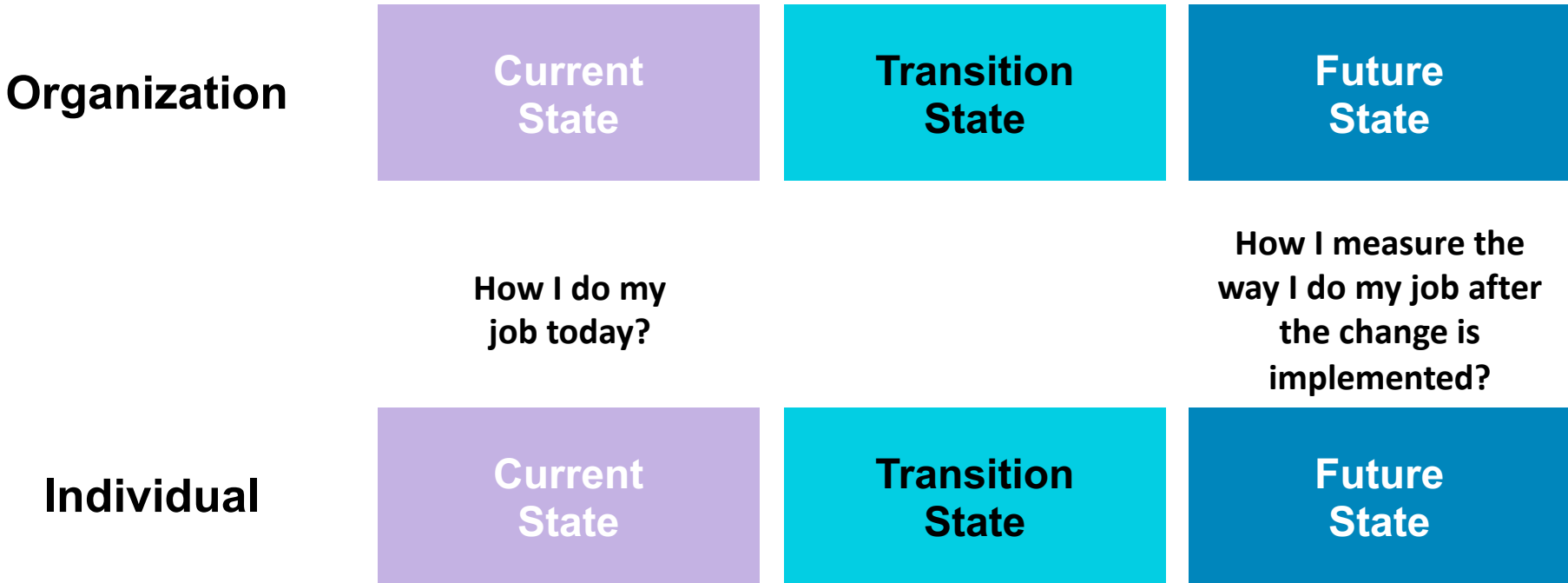


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Employee's vision of change



Consequences of not managing the people side of change

Lower productivity

Passive resistance

Active resistance

Turnover of valued employees

Disinterest in the current or future state

Arguing about the need for change

Changes not fully implemented

People finding work-arounds

People revert to the old way of doing things

More people taking sick days or not showing up

The change being totally scrapped

Divides are created between 'us' and 'them'



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Change Management Perspectives

Employee Perspective

Understanding how one person makes a change successfully



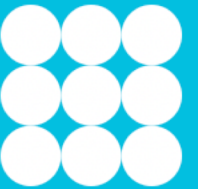
Organization Perspective

The tools that project teams and managers have to support the 'people side' of change





THANK YOU



Questions?

Please feel free to reach out to us with questions or suggestions at:

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