

Benefits Realization Management Training Course

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Overview

Benefits Realization Management Training Course is a one-week intermediate course for portfolio managers, program managers, project sponsors, PMO professionals, and benefits owners who leave with a Benefits Realization Management File. Participants connect strategic outcomes to benefit maps, profiles, ownership, baselines, measures, dependencies, disbenefits, transition, reviews, corrective actions, and sustainment after delivery. Agile Leaders Training Center delivers this course in benefits realization management.

Who Should Attend

- Portfolio teams responsible for aligning change investments with intended value
- Program teams responsible for coordinating outcomes, dependencies, and benefit delivery
- Project sponsors responsible for accountability and post-delivery value
- PMO teams responsible for benefits methods, reporting, and assurance
- Operational benefits owners responsible for transition, measurement, and sustainment

The course assumes participants work with business cases, change initiatives, performance measures, or governance reviews and leaves out general project scheduling, financial investment appraisal, and portfolio selection methods.

Departments and Industries

The course supports departments that govern change and operating value across public, financial, healthcare, infrastructure, and service environments.

- Portfolio, program, and project management offices
- Strategy, transformation, and business change
- Finance, performance, and value assurance
- Healthcare, financial services, and public services
- Infrastructure, utilities, and professional services

Learning Objectives

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

- Analyze expected benefits against strategic outcomes.
- Build benefits maps, profiles, and ownership records.
- Use baselines, indicators, and reporting schedules.
- Evaluate dependencies, disbenefits, risks, and attribution.
- Apply transition and benefit review decisions.
- Build sustainment plans and corrective actions.

Course Agenda

Day 1: Identify and Define Benefits

- Strategic Outcome and Benefit Alignment Map
- Tangible and Intangible Benefit Classification Matrix
- Benefit versus Output and Outcome Test
- Disbenefit and Unintended Effect Register
- Benefits Identification and Prioritization Workshop Sheet

Day 2: Map Ownership and Dependencies

- Benefits Dependency Network Map
- Benefit Profile and Definition Template
- Benefit Owner and Sponsor Accountability Matrix
- Attribution and Contribution Assessment Grid
- Benefits Register and Change Control Log

Day 3: Plan Measures and Realization

- Baseline and Target Definition Worksheet
- Leading and Lagging Indicator Selection Matrix
- Data Source, Frequency, and Evidence Plan
- Benefits Realization Roadmap and Milestone Schedule
- Reporting Threshold and Escalation Framework

Day 4: Transition, Review, and Sustain

- Operational Transition and Handover Plan
- Benefits Review Meeting and Decision Record
- Variance, Dependency, and Risk Diagnosis
- Corrective Action and Reforecasting Log
- Benefit Sustainment and Ownership Continuity Plan

Day 5: Practice Benefits Decisions

- Suggested Exercise: Build a Strategic Benefits Map
- Suggested Exercise: Complete Benefit Profiles and Ownership
- Suggested Exercise: Design Measures and Baselines
- Suggested Exercise: Review Variance and Transition Evidence
- Capstone Exercise: Complete a Benefits Realization Management File

Practical Exercises

The course uses suggested activities with fictional transformation, healthcare, infrastructure, and service-improvement cases.

- Suggested activity: separate outputs, outcomes, benefits, and disbenefits for a digital-service change.
- Suggested activity: map ownership and dependencies for a healthcare improvement initiative.
- Suggested activity: select indicators and baselines for an infrastructure investment.
- Suggested activity: review transition evidence and corrective actions for a service program.

FAQs

Who suits benefits realization management training, and what does it assume?

Benefits realization management training suits portfolio and program managers, sponsors, PMO teams, and operational benefits owners. It assumes experience with business cases, change initiatives, performance measures, or governance reviews.

How does benefits realization management differ from project management training?

Benefits realization management focuses on value derived from outputs and outcomes before, during, and after delivery, while project management training focuses more broadly on organizing and controlling the work that produces deliverables.

What belongs in a benefits map and benefit profile?

A benefits map links changes, capabilities, outputs, outcomes, benefits, and dependencies. A benefit profile records the definition, owner, baseline, target, measures, data sources, timing, risks, reporting, and sustainment responsibilities.

How are benefits realization measures selected?

Benefits realization measures are selected by linking strategic intent to observable change, available evidence, baseline conditions, targets, timing, ownership, and decision needs. Teams combine leading and lagging indicators where appropriate.

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How are benefits sustained after project transition?

Benefits are sustained through assigned operational ownership, handover evidence, continuing measures, review schedules, risk monitoring, corrective actions, and accountability for maintaining the changed capability after project or program closure.

Conclusion

Participants take back a Benefits Realization Management File. It combines benefit maps, profiles, ownership, baselines, indicators, dependencies, disbenefits, roadmaps, transition evidence, reviews, corrective actions, and sustainment plans. The file helps teams connect change investment to measurable value and accountable decisions beyond delivery.

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