

Department of Construction Economics Management



**Master of Science in Project Management**

**Title:**

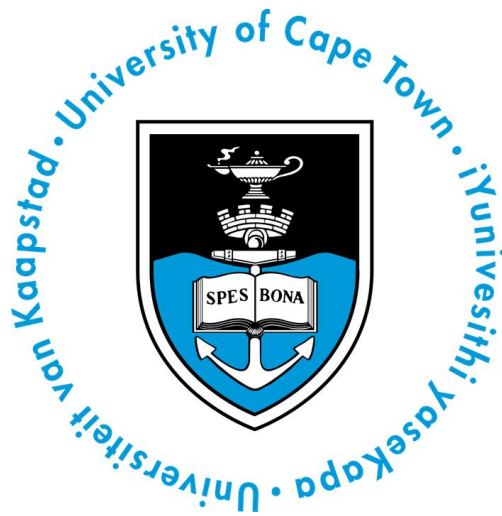
**Benefits Management and its value to the organisation: A  
case study in a private organisation**

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## Abstract

This research evaluates the application of the Benefits Realisation Management (BRM) particularly in the private sector with strategy implementation projects. The key objectives of this study are: to evaluate the alignment of project benefits and the organisations strategic goals, to understand the processes followed to ensure the benefits identified are realised, and to further understand the challenges that the organisation may be facing that influence the adoption of BRM as well as gain insights on potential aiders that can help accelerate the adoption of BRM in the private sector.

Ten senior and executive management team members voluntarily participated in the study, and most of the participants completed the interview sessions via face-to-face meetings in the Western Cape, City of Cape Town and others were interviewed online.

The analysis of the data has revealed that, the organisation considers project success as the project that has met the triple constraints criteria, delivered on time, on budget and on the agreed scope which is considered to be the project management success as it is still based on the traditional approach to project management even though project success view has shifted overtime and according to literature, the project success is based on the Project Management success as well as the customer satisfaction and the value that the project change has brought about (project benefits).

The organisation puts in effort at the pre-initiation phase of the project by identifying the benefits and ensuring it aligns to the strategic objectives of the organisation to obtain funding as this has become a requirement to justify projects and get the board's approval. Whilst this is the first step to the BRM process, the study reveals that the benefits identified at the beginning of the are not tracked or monitored throughout the project or post completion. Also, the findings reveal that the projects that do not require funding from the board do not necessarily have to

align to the organisations strategic goals, and some do not follow the project governance processes thus, the BRM process is not fully implemented. Another key finding is that the organisation still regards project success based on the traditional approach to project management, which is the project deliverable being met, on time and on budget, they confirm that the benefits realisation should be part of the project measure of success, and the view of project success needs to be based on the project value which includes the realisation of the benefits anticipated.

The organisation still does not have a clear understanding of who the benefit accountability should lie with, the study reveals that there is a lack of accountability in the organisation as well as the unclarity of who is or should be accountable for benefit realisation. Although the senior management teams believe that the BRM process should be implemented in the organisation and applied across the divisions, there are gaps within the organisation which mainly includes, the education of the business on the BRM process itself, setting up the BRM process and standardising it across the departments, reinforcement of accountability, stakeholder involvement and gaining Top Management buy-in. The correction of these should then aid the adoption of the BRM process.

The limitations of this research are the region and sector in which the study was conducted. The study was conducted in a single private organisation headquarter in the Western Cape region in South Africa. The organisations sector is the retail sector. Only certain departments that implement strategy driven projects were invited to participate to the study. The study can be expanded, and the recommendations are outlined in the report.

## Acknowledgements

To my family and friends, thank you for your continued support throughout my studies and to my partner, thank you for being there for me. Sharing the space, picking up where I could not and encouragement throughout my studies. To my unborn child, thank you for giving me the extra push, to stay focused, strong and push a little bit harder.

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## List of Acronyms

No	Acronym	Description
1.	BR	Benefits Management
2.	BRM	Benefits Realisation Management
3.	ICTS	Information and Communication Technologies
4.	IT	Information Technology
5.	JSE	Johannesburg Stock Exchange
6.	PM	Project Management
7.	PMBOK	Project Management Body of Knowledge
8.	PMI	Project Management Institute

# 1. CHAPTER ONE: INTRODUCTION

This chapter introduces the research study, the problem statement, the research question, the objectives that this study aims to fulfil, the proposition, a high-level method to be used to fulfil the study and limitations anticipated during the study.

## 1.1 Introduction

The Project Management Institute (PMI) defines a project as a, temporary endeavour set to add value through the delivery of a unique product, service, or process, where some initiatives may be designed to resolve problems quickly and others require extended time frames to generate outcomes that will not require major improvements out of the planned maintenance (Project Management Institute, 2023). Turner defined a project as, an endeavour in which human, material, and financial resources are arranged creatively to carry out a defined scope of work provided, within the limits of cost and time, in order to produce a beneficial change by quantitative and qualitative objectives (Hyttinen, 2017).

The concept of Project Management then emerges,

Kasser (2019) defines the concept of Project Management as, *“The planning, organising, directing, and controlling of company resources (i.e. money, materials, time and people) for a relatively short-term objective”* (Kasser, 2019, p. 101).

According to the PMI, Project Management is the use of certain knowledge, tools, skills, and methods to provide people with something of value, it gives the examples of projects such as; developing a software for improving business process, building construction, a relief effort after a natural disaster, and expansion of business sales into new market (Project Management Institute, 2023). Project Management is also defined as a type of implementation that is aimed at improving the work done to achieve high performance (Tereso, et al., 2019), and before the project outcome is achieved, it goes through the specified stages of the Project Management

Lifecycle namely: 1) Initiation (Starting the Project), 2) Planning (Organising and Preparing), 3) Execution (Carrying Out the work) and 4) Completion (Ending the Project).

These stages cover all details of the project, from the fundamental components, such as the timeframes, budget, the dependencies and individual duties (Tarasenko, 2022).

More and more organisations are starting to use Project Management principles to strengthen their competitive business strategies (Shamim, 2022) as projects are said to create an opportunity for organisations to adapt to changes. In most organisations, projects have been identified as the mechanism to use to deliver on the organisations strategic objectives to help gain a competitive advantage (Rivillas, et al., 2022). Overtime the organisations have seen substantial profits when they successfully integrated the technology and business strategy, as they used the alignment to lower the costs, increase customer and supplier relationships, improve efficiencies and develop new business solutions and products (Weiss & Anderson, 2004), thus, Information Technology (IT) has now become a key enabler of the business strategies in areas like the mass customisation, competitive differentiation, quality enhancements, and process automation and improvement (Weiss & Anderson, 2004).

IT projects are seen to be used to implement the business strategies, and while the use of Project Management is gaining attraction, the Standish Group International Chaos manifesto published in 2015 survey revealed that of the projects undertaken within the IT sector, 29% were a success, 52% were challenged which meant that they were either delivered late, or over the budget or had less features and functions as initially agreed, and 19% were recorded as failed which included, those which were either cancelled, placed on hold or delivered but not utilised (Tereso, et al., 2019).

In 2020, the Standish Group survey results, Henry (2021) showed a 2% increase from 29% to 31% for the project success rate, the challenged projects recorded a 2% drop from 52% to 50%

and the failed projects remained at 19%. The factors identified that influenced the rise in success rate include the project maturity level within an organisation which includes a good place, a good team and a good sponsor (Portman, 2021). Although the primary goal for using the Project Management processes is to increase the organisational value from the investment initiatives set out, the methodologies and technique followed are said to also influence project success (Badewi, 2016).

## **1.2 Background to the research problem**

Literature shows that though projects allow for implementing valuable changes in an organisation in a structured way, they fail to deliver the benefits that are expected (Sempiterno, et al., 2021),

A benefit is defined as *“a flow of value that occurs when project outputs are used by customers”* (Musawir, et al., 2017, p. 1660). Ward and Daniels define a benefit as *“an advantage on behalf of a particular stakeholder or stakeholder group”* (Badewi, 2016, p. 763). Zwikael defines the project benefits as *“the flows of value that arise from a project”* (Zwikael, 2016, p. 1).

The process of benefits realisation management aims to assist organisations in achieving their strategic goals through projects (Sempiterno, et al., 2021). It is aimed at ensuring that the benefits planned at the beginning of the project are fully achieved and realised. Musawir & et al. (2017), quote the Project Management Institute report published in 2016, that 17% of the organisations have a high level of maturity in Benefit Realisation and this has been the case only between 2014 and 2016, additionally quoting that only half of these organisations have reported to be frequently identifying benefits aligned to the strategic objectives of the organisations.

The concept of Project Management and Benefits Management are two interrelated approaches for making projects successful (Badewi, 2016) and According to Badewi, the main purpose of

using a Project Management framework is to primarily improve organisational value (Badewi, 2016). Project Management practices may lead to an increased probability of success in projects if properly applied (Tereso, et al., 2019), as the organisations in practise are responsible to assess their applicable practices due to the different requirements in different organisations. The organisations then need to apply Project Management practices using the tools and techniques tailored to fit the organisations context and or the specific project.

Tereso and the team (2019) argue that, even with the increased visibility and importance of Project Management practices in organisations, Project Management is still a problematic endeavour (Tereso, et al., 2019), the statistics of project success quoted in the introduction reveals this.

Due to the recent global economic crisis, enterprises have a greater need than ever for project portfolios that are more efficient. Therefore, a management discipline called the Benefits Realisation Management has been used more and more to provide guidance during the conception and management of the projects based on the business requirements and to support governance effectively (Serra, 2013).

Despite research showing that the application of benefit realisation management is a process of continuously reflecting on the investment value and benefits thereof, which should contribute to the organisations meeting the strategic goals, literature reveals that the organisations do not always harvest the benefits as intended (Marnewick & Marnewick, 2022). This reveals that, there is a break in the link between the organisation's strategy, the rationale put forth for the project and the benefits anticipated (Marnewick & Marnewick, 2022).

### **1.3 Problem Statement**

The problem statement:

*The success of a projects business case can only be measured once all benefits have been realised. From literature it is apparent that senior managers seldom adopt an approached such as benefits realisation management, which will assist is categorising a project as successful.*

### **1.4 Research Question**

The research question is:

*What are the factors hindering the adoption of benefit realisation management within a private organisation to assist in determining whether projects have achieved their strategic goals and can be classified as a success?*

### **1.5 Research Objectives**

The main study objectives are to:

- 1) Understand how the project benefits are aligned to the organisation's strategic goals.
- 2) Understand what processes are followed to ensure benefits are realised on projects
- 3) To review and identify the factors hindering the adoption of BRM process
- 4) To review and identify the factors that can assist in the adoption of BRM process

### **1.6 Research Proposition**

The research proposition is:

*The adoption of a Benefits Realisation Management processes aids the organisation's ability to determine project success by explicitly linking the project outputs to strategic benefits and measurable outcomes, and by assigning clear accountability to organisational roles which become responsible for each stage of value creation process.*

## 1.7 Research Methods

To achieve this study the following approach will be followed:

- 1) Literature will be reviewed from accredited peer reviewed journals and conference proceedings using key words such as Project Management in organisations, benefit realisation management, and strategic alignment of projects.
- 2) Semi-structured interviews will be conducted within an organisation that applies Project Management processes and methodologies to deliver projects.
- 3) The data will be analysed using appropriate techniques and
- 4) Key findings will be discussed.

## 1.8 Limitations

This research is limited to the retail sector in South Africa listed with the JSE. Headquartered in the Western Cape Province, in the City of Cape Town. The focus will be on the specific departments within the organisation that delivers strategic projects using Project Management processes and methodologies. Therefore, the findings of this study cannot be generalised to other organisations or non-strategic projects.

## 1.9 Structure of the research report

This report follows the following structure:

**Chapter 1: Introduction and Background to the study.** This chapter gives a brief overview of the research topic, and introduction to the research problem. The research problem statement, research question, research objectives and the research proposition are all included in this chapter.

**Chapter 2: Literature Review** This chapter reviews the existing literature that covers the issues related to the benefits realisation, project success and outline the benefits realisation

management in organisations and its link to the strategic objectives. Also, the implementation of the BRM process in the organisations.

**Chapter 3: Research Methodology.** This chapter discusses the research methodology approach, strategies and study population and data analysis techniques applied in undertaking the research study.

**Chapter 4: Data Analysis and Discussion.** This chapter provides an analysis of the data collected using the selected tools and will discuss the research findings.

**Chapter 5: Recommendations and Conclusion.** This chapter provides the conclusion and recommendations based on the outcomes of the study.

## **2 CHAPTER TWO: LITERATURE REVIEW**

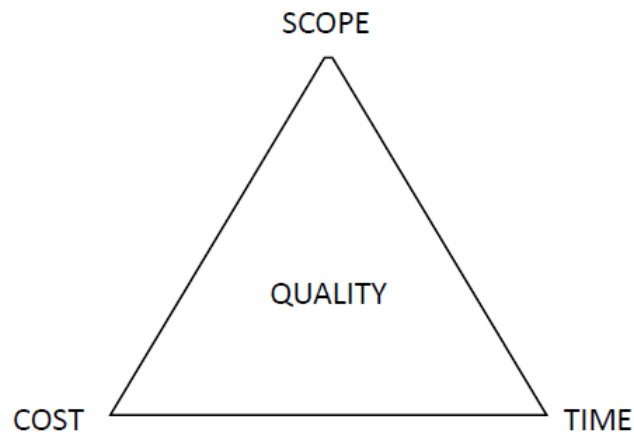
### **2.1 Introduction**

This chapter provides the literature reviewed to support the study of Benefit Realisation Management and its value. The literature will highlight the evolution of project success in Project Management from the traditional approach to customer satisfaction and the value projects deliver. It will further elaborate on the BRM process and how it is linked to the Project Management and its implementation in private organisations with particular focus on strategy projects.

### **2.2 Project Management**

Project Management is impacted by a variety of social and corporate elements, including the rapidly changing market conditions, the short time to market, and new technologies, thus the different projects require different approaches to be applied for successful execution (Thesinga, Feldmann & Burchard, 2021). The framework used to analyse and reconcile the competing demands of cost, scope or quality and time within projects is referred to as the *'Iron Triangle'* (Ebbesen & Hope, 2013) and its initial intent was to provide project managers with a framework for assessing and balancing the opposing demands in their projects. Figure 1 shows the iron triangle, three parameters used to assess the quality of projects: cost, scope and time.

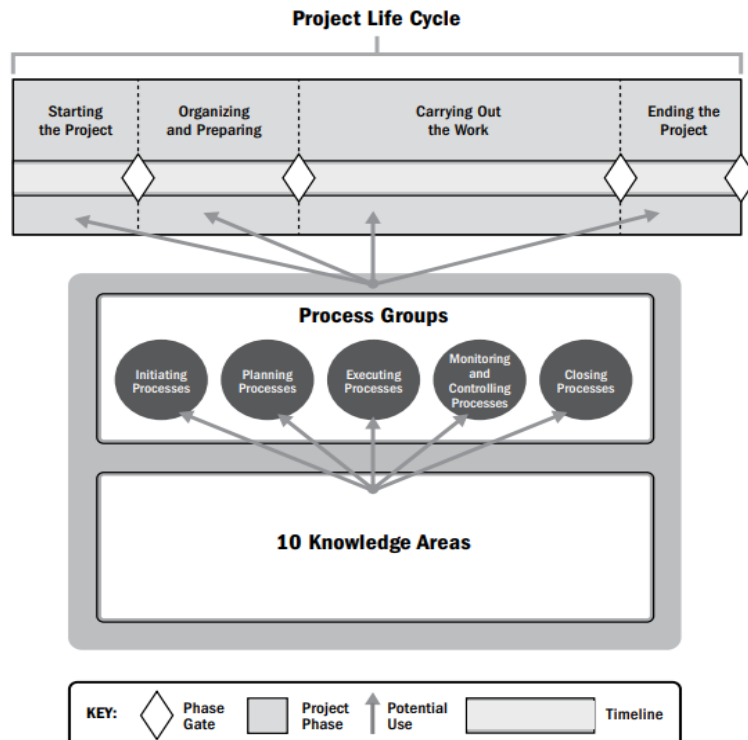
The iron triangle is a fundamental phenomenon that the Traditional Project Management approach uses as the main criteria to measure project success.



**Figure 1: The Iron Triangle** (*Ebbesen & Hope, 2013, p. 2*)

To understand the concept of Project Management, the project life cycle is outlined. According to the PMI in their publication the Project Management Body of Knowledge (PMBOK), a Project's Life Cycle is the sequence of stages that a project goes through from the beginning to the end, it offers the fundamental structure for handling the project and regardless of the project activity involved, this fundamental framework applies, and may be sequential, iterative, or overlapping (Project Management Institute, Inc, 2017). They further state that the Project Life Cycle is managed by carrying out several project management tasks known as Project Management processes.

All projects can be mapped to the life cycle shown in Figure 2.



**Figure 2: The interrelationship of PMBOK Guide Key Components in Projects** (*Project Management Institute, Inc, 2017, p. 18*)

The PMI added that the Project Management processes are grouped into five process groups, which include the processes of: initiation, planning, execution, monitoring and control and closing.

To further categorise the process groups, the ten knowledge areas are used, which are described as the logical grouping of the Project Management procedures established to fulfil the specific project objectives (Project Management Institute, Inc, 2017).

### 2.2.1 Traditional view of project success

The traditional approach to project management views project management success as a project that adheres to the Iron Triangle principles, where there are no scope creeps, no cost overruns, and projects are delivered within the agreed timeline (Badewi, 2016). The literature reviewed from the earlier years till 2005 show that the view of project success was based on the three

success measures as stated on the iron triangle, which later a gradual trend was seen towards the view of project success to include client satisfaction as an additional variable to assessing project success at the end of the project life cycle as well as during the product life cycle (Müller & Jugdev, 2012).

Typically, when project managers evaluate project realisation, they generalise the outcome by referring it to the word “success” (Abylova & Salykova, 2019)). Literature however distinguishes between ‘Project Success’ and the ‘Project Management Success’. Project Success is defined as the achievement of the project or the organisations objectives, while the Project Management Success is referred to as the measure of the Project Management success through the traditional approach using the Iron Triangle parameters of Time, Cost and Quality (Abylova & Salykova, 2019), which is considered as an objective criteria as the parameters are tangible and measurable (Ebbesen & Hope, 2013). Badewi (2016) added that project success is measured through the project efficiency in the short-term and the project effectiveness is based on the long-term view of measuring the achievement of the expected outcome, therefore the value of the project is determined by how well it meets the client needs, aligns the project outputs with the organisations strategy and generates a return on investment (Badewi, 2016).

Literature reveals that the traditional method to project management has been regarded as ineffective as project management brings both, tangible and intangible benefits and it becomes hard to find the exact solution to project management evaluation as perception is also important (Lalic, Lalic, Delic, Gracanin, & Stefanovic, 2022).

Lalic and company added that the relevance of the traditional approach to project management, is deemed inflexible in adapting to the uncertainty on projects as customer requirements sometimes change, and unpredictable activities arise in dynamic project environments (Lalic, et al., 2022). The projects value has been seen as one that fulfils the client needs, aligns its outputs with the organisational strategy, and generates a return on investment (Badewi, 2016), thus this

definition challenges the view of project success and the value in which the project brings to the organisation.

Keeyes and Huemann (2017) elaborate that the changes brought to the organisation by a project are often linked to the business case, which outlines the project reasons and justifies its existence in terms of alignment with the objectives of the business in which the project benefit might bring about value. They further state that benefits have been thought of as a concept connected to the conclusion of a project, where the outputs are given to the project owner for organisational change, which they argue that this is rather concerning as this results in the project being seen as separate from the benefit/s. According to Chih and Zwikael (2015) and Turner (2009), identifying project benefits is the first stage in creating a business case for the project, connecting it to the accomplishment of the hierarchy of business objectives and placing projects at the centre of benefits realisation and thus, the change in the view of project success over time makes it imperative to evaluate the project benefits linked to the organisations objectives separately from the project management success.

### **2.2.2 Rethinking the view of project success**

Literature studies show the traditional approach to project management and its link to project success as a one-dimensional phenomenon, the studies were looking at the link of project management and project success through the lenses of project governance, project management performance, project management enablers and efforts, and the individual project management practices (Lalic, et al., 2022). It was found that measuring project success now involves a more intricate, multi-dimensional measurement rather than only the triple constraints or iron triangle parameters (Lalic, et al., 2022). For evaluating project success, there are numerous intricate and multi-faceted models and frameworks available in literature (Marnewick & Marnewick, 2022) than just the focus on time, cost and quality.

Another key factor that emerged in literature to consider when determining project success is an effective project governance structure. According to Zwikael and Smyrk (2015), project governance creates conditions for ordered rules and collective actions as it provides a formal representation of organisational arrangement that surrounds specific projects, processes and methodologies to be followed. Project governance is recognised as one of the crucial factors to ensure successful delivery of projects and the realisation of benefits (Musawir, Abd-Karim, & Mohd-Danuri, 2020). The concept of project governance is therefore critical to organisations and project success.

### **Project governance**

Project governance is defined as a multi-level phenomenon that includes the relationship between the parent company, the suppliers or contractors and the project (Derakhshan, Turner & Mancini, 2019). It also supports the organisation by aligning the project objectives and monitoring the performance of the project (Biesenthal & Wilden, 2014). The definitions are key in highlighting the link between the governance and the stakeholders of the project. Stakeholder representatives should have room in the project's governance structure to manage their involvement in decision making and to address their concerns and needs (Derakhshan, et al., 2019).

Biesenthal and Wilden (2014) indicate that a number of current definitions of project governance agree that the primary focus of project governance is to align the project goals with the organisations strategy and as a result it seeks to benefit various stakeholders at the different levels in the organisation.

The increased interests in utilising projects to drive the implementation of the organisations strategy brings about the need to clarify the organisations strategies and stakeholder's translation to the project, this is so to assist the implementation of organisational strategy, as the project

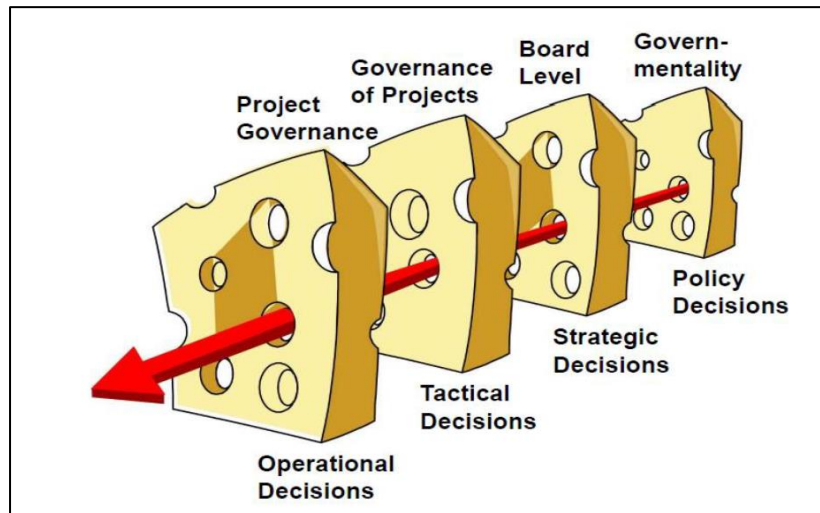
governance system plays a key role in ensuring that projects achieve their goals as outlined in the business cases (Musawir, et al., 2020).

Literature introduces the concept of ‘Governmentality’, and it is defined as:

*“The mentalities, rationalities, and ways of interaction chosen by those in governance roles to implement, maintain and change the governance structure”* (Turner, 2020, p. 3)

This concept was first introduced by Roland Barthes in the year 1957, further expanded by Foucault in the year 1991 (Turner, 2020) and it’s related to rationalities and the people side of governance. The concept was later further analysed, and four levels were established as: governmentality of project management, board level governance of projects; the governance of projects; and project governance, which is simplified to as the governance of project management (Turner, 2020).

Furthermore to project governance, another concept was introduced in literature in the 90’s as the ‘Swiss Cheese Model’, which proposed that for a failure to occur, a faulty decision needs to pass through the organisation which include policies, strategy, tactics and operations but for a good decision, it needs to also pass through the governance four governance levels, this model is shown in the **Figure 3** below.



**Figure 3: The Swiss Cheese Model of Decision Making** (Turner, 2020, p. 4)

Although organisations use projects to translate their strategies into actions, it is important that the projects are successful (Mamlook, 2018). According to literature the performance of operations can be optimised through successfully completing projects and aligning them to the operations strategy (Zwikael, Meredith & Smyrk, 2019), thus, project management practice is increasingly gaining visibility and becoming vital for organisations to pursue (Tereso, Ribeiro, Fernandes, et al., 2019).

According to Kerzner, better benefits management initiatives, more benefit realisation, and increased company value are all produced by using the best project management techniques (Tereso, et al., 2019), which also enhance project success (Badewi, 2016).

The link between the delivery of the project outputs and the delivery of outcomes stated as the ‘project benefits’ has since been assessed in many professional handbooks (Badewi, 2016), literature demonstrates evidence that the mere project management approach and practices do not ensure project success; rather demonstrates that project success depends on both the successful integration of both project management and benefit management. There is empirical evidence that combining project management and benefit management methods considerably

increases the success rates of projects and that project management practices alone do not produce successful initiatives (Zwikael, 2016).

### **2.2.3 The importance of value**

More than 40 years ago, the traditional approach to project management and perception was that project success is based on the completion of a project by adhering to the ‘iron triangle’ constraints which was completing the project on time, at the agreed cost and the performance as per the agreed standards (Kerzner & Saladis, 2011). Often on IT projects, the project managers are more concerned with achieving the client objectives or requirements whereas, the investors are often more concerned with the sustainability of the expected return on investment (ROI) which follows the implementation of the project over an extended period of time (Mamabolo & Marnewick, 2022).

The shifting economic landscape and increasingly global competitive environments are driving the project managers to become more business oriented (Kerzner & Saladis, 2011). Projects are now viewed from a strategic point of view and as part of the organisations strategy for providing value to the customer and the funding organisation thus, project success now includes the business component which is directly correlated to value (Kerzner & Saladis, 2011).

Kerzner and Saladis define success as:

*“Success is not necessarily achieved by completing the project within the triple constraint. Success is when the planned business value is achieved within the imposed constraints and assumptions.”* (Kerzner & Saladis, 2011, p. 62)

The term ‘value’ and ‘benefits’ are often used interchangeably. Literature urges the stakeholder organisations to use project outcomes to create value ( Artto, Ahola & Vaetiaine, 2016). A project can include developing completely new goods for existing or new markets, expanding

the capabilities of present products or services in existing or new markets, or even attempting to retire a product and remove it from the market (Shenhar & Dvir, 2008).

Value creation is then depicted from the project outcomes specified after the project is completed ( Artto, et al., 2016). Therefore, value must be included when defining success, to achieve what is perceived as value and ultimately the project success (Kerzner & Saladis, 2011), they added that the project manager must be able to see the value through the lenses of the customer.

Value management is defined as a framework that is utilised to define the problems and, or opportunities and enables the processes to review and bring about the optimal solutions to help improve and maintain sustainability (Association of Project Management, 2019). Value Management is a concept that is concerned with the needs and wants of the stakeholders as well as the resources utilised to satisfy them (Association of Project Management, 2019).

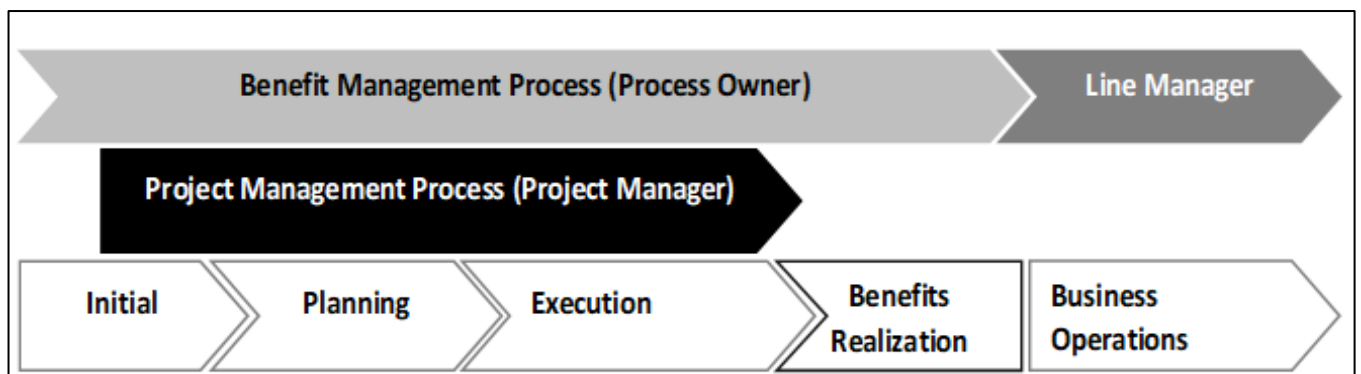
Furthermore, literature also refers to the ‘Adaptive Project Management approach’ as the approach that views the project not as a series of activities but as business related processes that are aimed at delivering the business results and where the project management style also adapts to the specific project (Shenhar & Dvir, 2008). The adaptive project management approach involves establishing the specifications and the selection of the success criteria upfront during the planning phase of the project which is beyond the traditional criteria of cost, time and specification (Shenhar & Dvir, 2008).

Shenhar & Dvir (2008) suggest five measures that can be used as the criteria in the adaptive approach which are:

- 1) **Project success:** Measures the time spent and budget expenditure.
- 2) **Impact to customer:** Measures the customer satisfaction, benefit and loyalty.

- 3) **Impact to the project team:** Measures the personal growth, retention and satisfaction of the team members.
- 4) **Business results:** Measures the return on investment (ROI), market share and business growth.
- 5) **Preparation for future:** Assesses how the project will prepare the organisation for utilising new technologies, entering new markets and providing new capabilities.

Furthermore, literature shows a link between the Project Management Process, focused on the project outputs and led by the project manager and the Benefit Management Process, focused on outcomes led by the project owner (Zwikael, 2016), which runs in parallel and collaborative to each other.



**Figure 4: The BM and PM process across the Project Life Cycle (Zwikael, 2016, p. 3)**

Figure 4 above depicts the parallel relationship between project management and the benefits management processes, it shows the benefits formulation at initiation which then develops into a business case that then becomes the document with the anticipated benefit throughout the project (Zwikael, 2016).

Section 2.3 will then unpack how the concept of strategy is linked to the project management benefit management concepts.

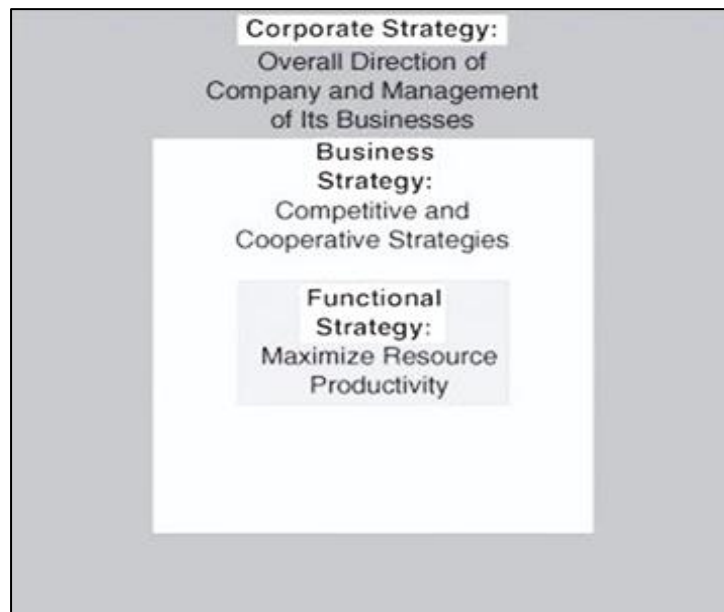
## 2.3 The concept of strategy

Hunger and Wheelen (2010) define the strategy of a corporate as a detailed plan that outlines how the corporate will accomplish its goals and mission, competitive advantage will be maximised, and competitive disadvantages minimised.

They outlined that there are typically three types of strategies that are considered in organisations and defined each type as:

- 1) **The Corporate strategy:** this is described as the overall company's direction towards growth and management of the various businesses and products that the organisation offers.
- 2) **The Business strategy:** is described as the one that occurs at the business unit or product level. It emphasises on improving the competition position for the products or services rendered in industry and how it will leverage of the market segment.
- 3) **The Functional strategy:** is defined as the approach that is usually taken by the functional area such as research and development, or marketing to achieve the corporate and business units' objectives by optimising the resource productivity.

Typically, organisations use all the three types of the strategy, the corporate, business and functional (Alsudiri, Al-Karaghoul, & Eldabi, 2013), the strategies are grouped into a hierarchy of strategy as shown in Figure 5 and nested into one strategy within another to support and complement each other, the functional strategies support the business strategies and business strategies support the corporate Strategy (Hunger & Wheelen, 2010).



**Figure 5: Hierarchy of Strategy** (*Hunger & Wheelen, 2010, p. 25*)

The alignment of project management processes to business strategy is crucial for the organisation's success, as this means that there is a common agreement between all the levels of strategy, which is the corporate, business and functional (Alsudiri, et al., 2013).

This alignment is a challenge as the strategic objectives are not often clear or well communicated to the business or organisation, this is a gap that causes the organisation to miss the opportunity to achieve tangible targets and objectives (Alsudiri, et al., 2013). Many organisations then begin to consider project management to be essential as it has been observed that the common reason for project failure is the misalignment between the project and the business objectives which is linked to the business strategy alignment (Pakistan, 2015).

Literature points out that it is crucial that all levels of the organisation clearly understands the business strategy, furthermore, in a dynamic and unpredictable world, today's project managers and executives need to be concerned about more than the technology and daily tasks, they also need to comprehend the strategic goals of the organisation (Alsudiri, et al., 2013).

When the organisations have established their vision and created their strategy, the senior management team develop specific projects initiatives or programmes to carry out the company strategy. However, because the organisations do not always have enough resources to invest in all the projects set out, they choose or prioritise the projects that will deliver the most valuable results aligned to the business strategy which will be delivered in the most effective and efficient way (Serra & Kunc, 2015). This evaluation or prioritisation is often made using financial and non-financial models (Serra & Kunc, 2015).

## 2.4 Definition of benefits

### Project benefits

A 'benefit' is defined as *"a flow of value that occurs when project outputs are used by customers"* (Musawir, et al., 2017, p. 1660). Ward and Daniels define a benefit as *"An advantage on behalf of a particular stakeholder or stakeholder group"* (Badewi, 2016, p. 763) and Zwikael added that the 'Project Benefits' can be described as the flow of value that emerges as a result of project (Zwikael, 2016).

According to Cunha and Ribeiro (2022) project benefits refer to the quantifiable improvement resulting from a deliverable that one or more stakeholder's regard as advantageous and will aid the organisation to achieve one or more of its goals. Project benefits are classified into two groups 'target benefit' and 'fortuitous benefits', target benefits are the benefits set before the project starts and the project sponsors views as an investment opportunity on the project and the latter refers to those which may then emerge during the project (Zwikael, Chih, & Meredith, 2018), From the definitions provided in literature, one can presume that benefits are dependent on changes from the "current state" to the "future state", therefore, the project benefits become the main reasons for organisations to invest in projects and ultimately expect deliverables that are linked to the benefits.

The benefits also support the organisations strategy by aiding in bridging the gap between the current and the future or desired value state (Musawir, Serra, Zwikael, & Ali,2017). Literature outlines that a benefit is an improvement that is measurable, and it is derived from a result which is perceived as a change that adds or added value from the stakeholder’s perspective (Andrade, et al., 2016). The benefits can be further classified into two types depending on how they can be measured. The two classifications are tangible and intangible. The tangible benefits are those classified as measured in a quantitative manor and often can be linked to the financial value where else the intangible benefits are referred to as those benefits that are assessed through a more subjective approach using qualitative tools to measure, such as assessing the behavioural changes and often these benefits cannot be linked to a financial value (Andrade, et al., 2016). Andre and company (2016) further outline the classifications of benefits according to the impact or value they add.

They outlined the four types of the benefit classification as (Andrade, et al., 2016):

- 1) **Strategic:** These advantages are linked to commercial prospects that promote business expansion and advancement. These are mostly institutional benefits that influence decisions on how best to allocate resources to meet the organisation's goals.
- 2) **Operational:** These are advantages resulting from modifications to the organisation's essential operations. They make changes to an organisation's daily operations that impact the effectiveness of its procedures, services, and goods.
- 3) **Economic:** These advantages regulate the organisation's resources and goods as well as all matters pertaining to finances.
- 4) **Social:** These are advantages that encourage the knowledge transfer within society. They encourage the adoption of attitude, behaviour, and actions that may promote unity and the welfare of all.

The concept of projects bringing about the benefits is linked to the organisation's strategy and the objectives, which forms as a strategic intent, this approach then cascades the objectives and goals of the organisation to be translated from the organisation's strategy to projects (Kasser, 2019). Further to the definition of target benefits, Zwikael and company added that the target benefits are referred to as the project business objectives as they are linked to the project owner's expectations of the project results after the project is completed and handed over to business (Zwikael, et al., 2018).

This is like the concept of benefits realisation where benefits realisation has been conceptualised as proceeding from a hierarchy of objectives that which are referred to as the "*Chain of benefits*" (Keeys & Huemann, 2017). Therefore, for businesses that depend on projects for change, innovation, and value creation, the realisation of benefits that have been committed upfront becomes of importance.

Project benefits can also be classified as short-term or long-term which signals the incident of potential occurrence of the anticipated benefit, the short-term benefits often cause immediate repercussion on the project and the long-term benefits outcomes are only visible when the project lifecycle is past the initial phase sometimes the repercussions are also indirect (Andrade, et al., 2016).

The project benefits are a sub-set of the project goals which include completing the project on the agreed timeframe and budget.

The set "*target benefits*" are set during the initiation phase of the project and they are then documented in the project document referred to as the project benefit case which is then circulated for approval by the project sponsor or project owner (Zwikael, et al., 2018). The business case is a document that is used to rationale and justify the project investment, outlining the anticipated benefits to obtain the management's commitment and authorisation of the project

to proceed (Einhorn, Marnewick & Meredith, 2019). The set targets are then used as the project baseline for monitoring and control and performance evaluation of the project after closure (Zwikael, et al., 2018).

A study conducted revealed that there are seven areas in which the project benefits can be classified into the benefit scope, described as follows (Andrade, et al., 2016);

1. **Value creation:** the benefits that are linked to the scope to optimise the return on investment
2. **Strategy:** the benefits that take part in the plan to achieve specified goals that are seen by the stakeholders as critical to the organisation's growth strategy
3. **Resources:** the benefits that are related to the assets used within the project, it includes the materialistic (i.e. equipment) and human resources (i.e. researchers or project team)
4. **Quality/performance:** the benefits that contribute to the performance of something of its total characteristics which satisfy the requirements for continuous improvement.
5. **Employability:** the benefits that lead to the preservation or the establishment of new jobs/ workspaces.
6. **Knowledge:** the benefits of knowledge transfer during the project or post the project delivery.
7. **Inter-relational:** the benefit that trigger the inter and intra-personal relationships of those involved on the project or programme.

### **Project disbenefits**

Project benefits are seen as the desired outcomes of the project, and the project disbenefits are the undesirable outcomes from a project or program (Zwikael & Huemann, 2023). The project benefits and disbenefits can both be anticipated during project initiation and stipulated on the

business case, the disbenefits can also be monetary or non-monetary (Zwikael & Huemann, 2023).

Project Management techniques and tools are focused on improving efficiencies of the output delivery, on time, within the budget and at the agreed specification, while this approach is well founded as the traditional approach to project management, project effectiveness is not only supported by focusing on efficient delivery of the outputs (Zwikael, 2016). A broader perspective of projects has emerged which acknowledges the role of projects in the creation of strategic value (Zwikael, 2016), which includes the focusing also on customer satisfaction and the value add. This shift in perspective acknowledges that the organisations invest in projects with a specific objective and intention to realise the identified target benefits (Zwikael, 2016).

## **2.5 Benefits Realisation Management**

Project Management and Benefits Management are two interrelated processes that aim to maximise the performance of projects in organisations (Scheepers, McLoughlin & Wijesinghe 2022). Benefit Realisation Management (BRM) also referred to as Benefit Management (BM) has been suggested as the structured and comprehensive approach for project managers to utilise to realise the project objectives and improve project success (Scheepers, et al., 2022). BRM is described as a process that involves analysing the information on management strategies, including internal and external factors and the motivations used to justify the projects in order to identify and classify the expected benefits into the correct categories (Andrade, et al., 2016). The BRM process is also seen as a tool used by management to realise the strategic value of the investments and a way to assist in identifying, planning and managing the delivery of benefits (Scheepers, et al., 2022).

Hietala and Päivärinta (2021) added that BRM is a process of planning and managing potential advantages that arise from using technology and systems and ensuring that the benefits are realised. It is also defined as a process of overseeing the benefits that have been committed upfront which are outlined in the business case until the point at which they are perceived as the actual benefits (Marnewick & Marnewick, 2022).

The BRM process is a traditional process that relatively follows a linear procedure where the priority of the project is determined by the business case and only at the time the project deliverables bring about the change to the organisation as anticipated the benefits are realised (Marnewick & Marnewick, 2022). As such a business case must be reviewed and reevaluated periodically to ascertain that the benefits presented initially are still valid (Marnewick & Marnewick, 2022).

The BRM process enables us to maintain control over the benefits anticipated by clearly identifying them and defining what they are, and the plan on how to measure and track them throughout the project, it also defines when they will be realised (Goldsack, 2023).

According to research papers there are mixed views on the relationship between benefits management practices and project success. From one angle, research indicates that there is a link between the use of benefits management practices and the success of projects (Serra & Kunc, 2015), conversely, the project management practices alone are seen to have a moderately significant connection to project success (Badewi, 2016). Berssaneti and Carval (2015) added that project management maturity influences the project management success and not the project investment success, which is the ultimately the benefit or value added by the project.

The effectiveness in managing projects is more than the execution-oriented project management strategy, but projects that are undertaken to create value and to deliver benefits (Samset & Volden, 2016). The effective management of projects is to be able to shape the interaction

between the goals of the sponsor and the way in which the project or programme is developed (Samset & Volden, 2016).

In summary, the business case is the document that describes the value the project brings to the organisation that sponsors the project or programme. Managing the business case is described as the value management of the benefits, costs, timeframes, risks and issues, etc and these are regularly monitored and reviewed during the project (Association of Project Management, 2019), while the benefits management is the management ensures that the business changes achieves the results that are expected by translating the business objectives to measurable benefits that can be tracked systematically (Sapountzis, Harris & Kagioglou, 2008).

### 2.5.1 Benefit Realisation Management techniques

There are several BRM models identified that are available in literature, that which can be used or followed for the application of benefits management.

Literature has identified the top 6 models shown in Table 1 with the summary of where the models can be practically applied or adapted.

No	BRM Models	Summary of Applications
1.	<b>Cranfield Model</b>	Overall industry, university collaborations, public sectors, Information Technology
2.	<b>Benefits realisation capability model</b>	Overall industry, university collaborations, public sectors, Information Technology
3.	<b>Active benefit realisation model</b>	A Theoretical proposal
4.	<b>Participation framework for ICT benefits realisation</b>	Public sectors
5.	<b>Justification planning approach</b>	Overall industry, public sectors, Construction industries,
6.	<b>Portfolio management approach</b>	Public sectors

**Table 1: BRM Models and their applications Source (Jerónimo & Pereira, 2021)**

The origin of the different models identified, and processes followed are further described below:

#### 2.5.1.1 The Cranfield model

The “*Cranfield model*” was introduced to try and improve the recognition of benefits achieved, the management of benefits, stakeholder awareness on projects and ensuring that the investments lead to the benefits that are targeted throughout the project (Mossalam & Arafa, 2016). The Cranfield model divides the BRM lifecycle steps into five steps as illustrated in Figure 6 below.

The first step is to:

- 1) **Identify and structure benefits** - the benefits must first be identified and structured to understand all the related technology defects, the business change, and the business objectives,
- 2) **Plan benefits realisation** - plan for responsibilities and delivery of the objective,
- 3) **Execute benefits realisation** - the plans are implemented to accomplish the suggested business changes,
- 4) **Evaluate and review results** - after the implementation of the plan or application the impacts of the project are evaluated using the measures that were predefined at the beginning of the project and
- 5) **Identify potential for further benefits** - the benefits that came up during the project need to be documented for future consideration (Jerónimo & Pereira, 2021).

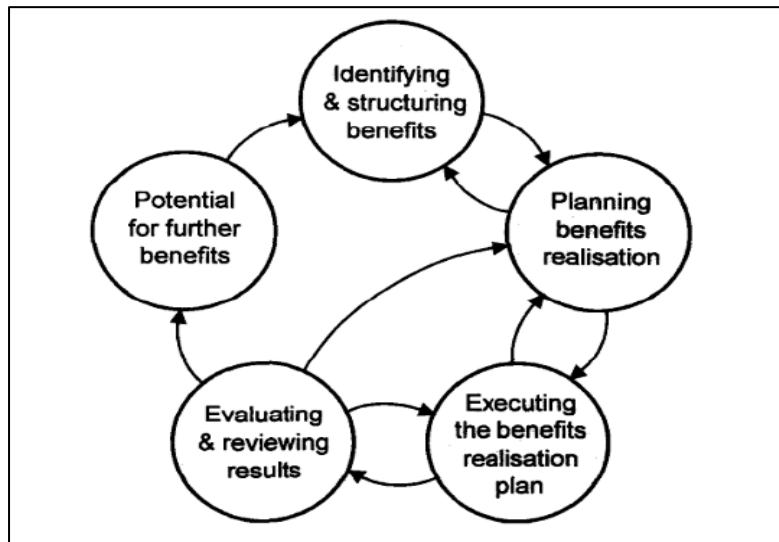


Figure 6: BRM life cycle and main activities (Jerónimo & Pereira, 2021, p. 341)

### 2.5.1.2 Benefits realisation capability model

The model aims to identify the clusters of knowledge, routines and skills that would be compliment and make a distinct contribution to the overall benefits realisation capability (Ashurst, Doherty & Peppard, 2008). This model is focused on the capabilities, competencies, and the practices relevant to the benefit management and not only its lifecycle (Jerónimo & Pereira, 2021).

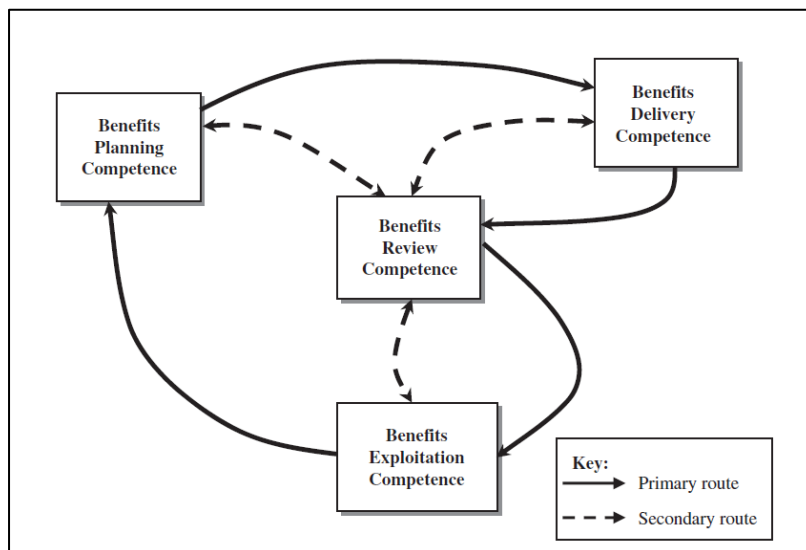


Figure 7: The Benefit realisation capability model (Ashurst, et al., 2008, p. 357)

Figure 7 illustrates the benefit realisation capability model and the different ways in which the competence can unfold. The first approach is represented by the solid arrows and moves seamlessly from 1) planning benefits, 2) delivering benefits, 3) reviewing benefits and 4) the on-going benefits exploitation when the system implemented is in full operation. The second approach is represented by the dotted line and also shows the relationship between the competences however views all activities as an ongoing process where all processes or activities needs to be reviewed and adjusted as required (Ashurst, et al., 2008).

#### **2.5.1.3 Active benefit realisation model**

This is an iterative model that has more steps and follows an analogous process with a scope that is wider as the benefits are evaluated from the business, financial and project perspectives (Jerónimo & Pereira, 2021).

#### **2.5.1.4 The participation framework for ICT**

This is another iterative model that begins with the process of benefit creation and the benefits are then confirmed and measured later to distinguish between the benefits which are considered as real vs the ghost benefits, there after transfer and sustain the benefits (Jerónimo & Pereira, 2021).

#### **2.5.1.5 Justification planning approach**

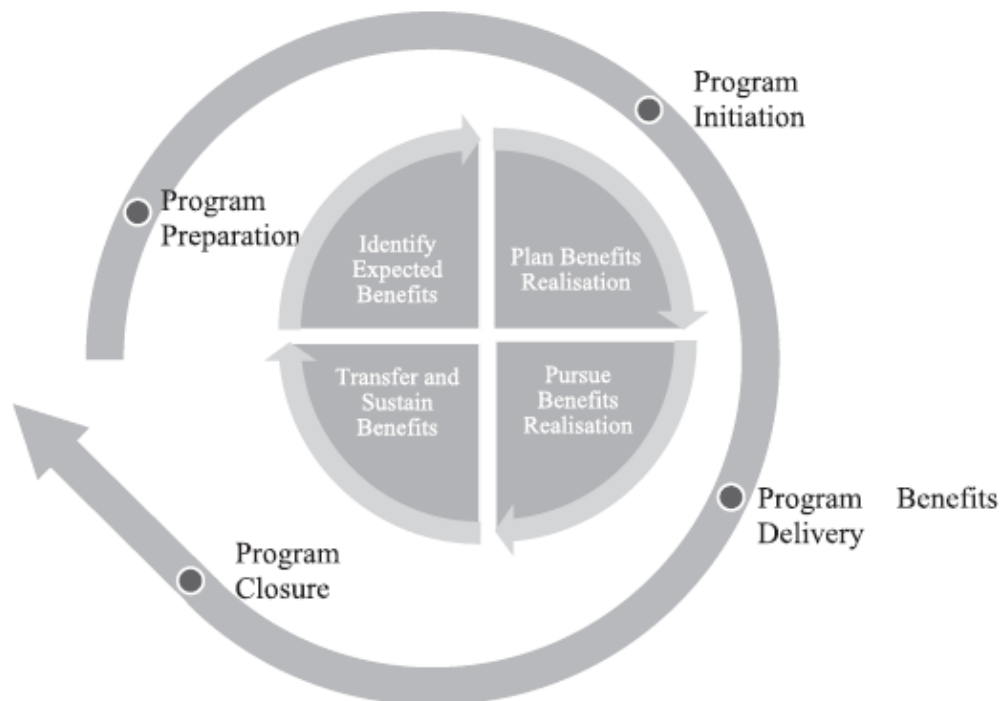
This is a linear model that aims to assist in estimating the information systems investment benefits so that the organisations can make informed decisions when choosing from the options presented (Jerónimo & Pereira, 2021).

#### **2.5.1.6 Portfolio management approach**

This is a linear model that focuses on prioritising the investments and managing the benefits that are from different projects over time and combines the benefits to avoid redundant investments (Jerónimo & Pereira, 2021).

In summary, the BRM process is contextualised under the theoretical perception of the PDCA cycle (Plan, Do, Act, Check) (Fernandes & O’Sullivan, 2021). From literature the BM key activities can then be classified into four stages which are to, **1) Identify the Expected Benefits**, **2) Plan the Benefit Realisation**, **3) Pursue the Benefit Realisation**, and **4) Transfer and sustaining the Benefits** to support the organisational change and its effects as incurred by project management mechanisms to realise the pre-defined project benefits (Badewi, 2016). The activities are linked to project or programme management activities and it is evident that the connection between project management and the benefits management practices is important to understand the overall concept of BM (Fernandes & O’Sullivan, 2021).

The BM framework concept is divided into the four stages and programme lifecycle linkage can be seen in Figure 8.



**Figure 8: BM framework Conceptualisation** (Fernandes & O’Sullivan, 2021)

The key processes shown in Figure 8 help organisations ensure that the projects or programs set out deliver real, measurable value and contribute towards achieving the organisations strategic goals (Fernandes & O’Sullivan, 2021).

These processes are defined by various authors and are summarised as:

- 1) **Identify the expected benefits:** Determine the expected benefits and align them with the strategic objectives of the organization. This involves defining what success looks like and how it will be measured (Project Management Institute, 2018).
- 2) **Plan the benefit realisation:** Develop a benefits realization plan that outlines how and when the benefits will be achieved. This includes setting timelines, identifying necessary resources, and establishing metrics for tracking progress (Levin, 2015).
- 3) **Pursue the benefit realisation and reviewing benefits:** Implement the project or program while continuously monitoring and managing the benefits. This ensures that the project stays on track to deliver the expected outcomes (Harrin, 2011), and regularly review the benefits to assess whether they are being realized as planned. This involves comparing actual outcomes against the expected benefits and adjusting as necessary (Harrin, 2011).
- 4) **Transfer and sustaining the benefits:** Ensure that the benefits are maintained after the project has been completed. This may involve transitioning the benefits to an operational team or setting up processes to sustain the benefits over the long term (Project Management Institute, 2018).

## 2.6 The role of project stakeholders on benefit realisation management

The process of project management has been focused on the delivery of the projects often within the agreed costs, quality and schedule and not on ensuring that the right project is delivered to enable the implementation of the organisations strategy and this is where the role of the project

sponsor was developed to ensure that the right projects are completed (Opoku & Tallon, 2019). Therefore, the role of the project sponsor has been defined as that which is to create the projects that aim to deliver the change that meets the business strategy and to enable others to effectively manage projects while the sponsor maintains the oversight of the project (Opoku & Tallon, 2019). Furthermore, the project sponsor is expected to take ownership of the project post-delivery and measure the effectiveness of the objectives met, Opoku and Tallon added.

In the study that Opoku and Tallon completed, they found that the sponsors role was defined as that which defines clear goals for the projects using processes like benefit mapping and ensuring that the benefits are realised through projects by maintaining the required communication, defining the objectives, defining the requirements and that the problems are understood before the identification of solutions (Opoku & Tallon, 2019)

Project Managers on the other hand remain under increased pressures to show the funding organisations the value of their programs. Many projects are said to lack a reliable method for achieving strategic value (Musawir, et al., 2017). To ensure projects achieve the strategic value, Zwikael and Smyrk (2015) suggest that a strong Benefit Management (BM) process is needed for the active management of project outputs, outcomes, benefits, and ongoing alignment with organisational strategy and a solid governance framework provides structure, clarifies roles and accountability that support as effective BM is also required (Musawir, et al., 2017).

Although projects begin with benefits identified and defined on the benefit case document, many project managers believe that the project deliverables which is the output is what remains within their responsibility and not the expected outcomes (benefits) of the project, this does often lead to the assumption that the benefit realisation is someone else's role and not necessarily the project managers (Mossalam & Arafa, 2016).

To understand the connection between the concept of project management benefits management and the responsibilities thereof, the literature shows that the benefit management process as the process that runs parallel to the project management process where the benefits management process is thought of as a process that started pre the project initiation phase, when the benefits were identified and approved (Zwikael, 2016). Then the benefits are managed by continuously monitoring the controlling them throughout the project life cycle till post the project closure, where the project benefits are realised and sustained (Zwikael, 2016).

The project management processes are seen as the responsibility of the **project manager**, with only the initiation, planning and executing the project under his or her responsibility (Zwikael, 2016).

The benefits management process on the other hand is seen to be the responsibility of the **process owner**, who is involved from initiation through till the benefits are realised (Zwikael, 2016). The solution delivered is then handed over to the line management who then carries out the business operations with the operations team.

The two additional phases are therefore added to the project management 5 steps process of **initiation, planning, execution, monitoring & control and closure**, the additional phases being **the pre – initiation** phase and **post-implementation** phase and are defined as: The pre-initiation phase is where the project benefits are identified while the post-implementation phase is the state where the benefits transition and are to be sustained (Mossalam & Arafa, 2016).

**Pre-initiation phase:** The main task in the pre-initiation stage is to evaluate the link between the value proposition of the project which is ultimately the benefits and the strategic objective of the organisation (Mossalam & Arafa, 2016).

**Post-implementation phase:** This stage involves the **Benefit Management office** and the **programme manager** if available to ensure that the benefits are transitioned and sustained

(Mossalam & Arafa, 2016). This phase is often the responsibility of the Benefit Management office and or sometimes the asset management (product owner) team to take the lead and measure the benefits post the project delivery thus, this phase is not within the scope of the project manager as often the project manager moves to the next project post the delivery of one project (Mossalam & Arafa, 2016).

## **2.7 Implementing the BRM approach in strategy projects**

### **2.7.1 BRM and Project success**

The concept of BRM has evolved over time, and it is interpreted differently across various industries. Project Benefit Management is a new field of study that emphasises the strategic functions of projects in the organisations and describes the process of benefit management process application on projects (Zwikael, 2016). This is an important area of research in order to propel the field of project management towards the significant impact on business since the projects put strategy into practice and thus, considering the projects strategically can assist to establish them as a primary activity for creating value (Zwikael, 2016). Thus, projects can be used as instruments to implement business strategies through benefit management.

The outcome of using the project management techniques in transformation change such as the deployment of a new systems aimed at changing the work processes might be discouraging (Badewi, 2016). It is suggested that the project management practices should be integrated with change management practices and to help in synchronising the soft and hard approaches to managing projects and stakeholders to deliver projects (Badewi, 2016).

Project managers involved in research and development collaborative projects have perceived benefits management as a tool of growing value, this concept have led to the conclusion that it is reasonable to apply the concept if return on investment and as a result establish a measurable

relationship between the resources invested on the project and the benefit that have been realised (Andrade, et al., 2016).

Benefits management is complex and should not be reduced to merely looking at the economic factors (Andrade, et al., 2016), to fully commit to an effective benefits management approach, it is crucial to consider all the relevant factors, tangible and intangible (Andrade, et al., 2016), which the intangible factors are often not expressed formally but typically acknowledged by the project stakeholders.

The benefit realisation can be divide into two parts, one where the realisation of benefits is viewed as a success factor in the project and the other, where the artefacts that are created by the project are required to be beneficial to the End users and the organisation that the project is delivered to (Mamabolo & Marnewick, 2022). Mamabolo and Marnewick (2022) further describe the two parts of benefit realisation projects as, the first part, being that which the benefits include gaining a higher market share, providing the validity of the business case, developing new technologies or creating new markets of which are benefits that are typically realised after the delivery of the product and when the end users start using the product.

The second part, is that which the benefit is when the product delivered meets all the specified standards and requirements, embraced and is utilised by the end users and has a positive impact on how the users do their work (Mamabolo & Marnewick, 2022).

Business projects that have information technology elements are referred to as the ‘business IT’ projects or ‘IT Projects’. These kinds of projects have over time seen an inadequate success rate, which leads to the wasteful spending of organisations in strategy driven projects (Einhorn, et al., 2019). IT projects are defined as those projects in which the usage of IT deliverables result in business benefits (Einhorn, et al., 2019). As the poor project success rate of 60% in IT projects

was recorded (Einhorn, et al., 2019), an alternative approach to project management was recommended such as the agile methodology.

The agile methodology is defined as the project management approach that uses the iterative processes to discovery, and it was formulated to help manage the development projects and, it has been explored across different types of projects due to the popularity and success rates seen on IT projects delivered (Marnewick & Marnewick, 2022). The “IT projects” are often different from other types of projects as they typically experience rapid change and often the business case must be updated (Einhorn, et al., 2019) to accommodate the changes during the project.

In strategy driven projects the goal of using BRM, is to increase project success (Badewi, 2016). Therefore, from a strategic point of view, project initiatives that are successful deliver the anticipated benefits, thereby adding the strategic value to the organisation (Serra & Kunc, 2015). Each project must be managed carefully to ensure the delivery of the project output, enable outcomes and then support the realisation of the intended benefits (Serra & Kunc, 2015). As such, the BRM process is aimed at delivering the benefits and it is defined as the process of organising and managing the anticipated project benefits that arise from using the systems or products (Terlizzi, Albertin & Moraes, 2017), and ultimately achieving project success.

### **2.7.2 Factors that influence the BRM application**

Literature reveals that although organisations have implemented the formal processes for project management practices, there is still a gap in the implementation of the BRM practices, either that the organisations do not follow the BRM processes or that they have no formal BRM processes in place.

According to the findings of the study undertaken by Hietala and Päivärinta (2021), there were **no systematic approach** to managing the benefits realisation and some projects did not follow the formal approach to project management and that contributed to the benefits not being

identified, and where benefits are identified, they were often not clear (Hietala & Päivärinta, 2021). The study revealed that a **systematic approach to BRM and extensive planning** at the beginning of the project improves the delivery of benefits in projects (Hietala & Päivärinta, 2021). It highlighted that a systematic approach may also positively contribute towards employee job satisfaction when employees know the project objectives and benefits from their efforts (Hietala & Päivärinta, 2021), which ultimately is linked to the delivery of the benefits.

Literature suggests that although the BRM processes are directly connected to the generation of value for the business, the processes by themselves are insufficient to result in high levels of project management performance, thus for project success to be realised the BRM process needs to be implemented in conjunction with the **project, programme or portfolio management practices** to ensure complete management of the performance of projects (Serra & Kunc, 2015). Furthermore, project management practices are crucial but alone do not guarantee benefits realisation, thus **setting clear targets for the benefits realisation** is important and helps to give clarity on the project targets and improve the project performance (Zwikael, et al., 2018).

Serra and Kunc (2015) indicate that **incorporating a benefits management strategy** within the corporate governance procedures aids the organisations in defining and managing their success criteria. The development of the strategic resources includes the alignment of the project teams, the sponsors and clients or owners to deliver successful and meaningful value to the organisations and its stakeholders (Serra & Kunc, 2015).

**Stakeholder awareness** in practice is associated with the return on investment across three different countries studied which gives evidence that the more frequent alignment between stakeholders on expectations is a critical success factor for strategic project success (Serra & Kunc, 2015) which is ultimately aligned to the business strategic goals.

Furthermore, determining the **benefit responsibility**, who should be in charge of providing benefits and where they should take place is crucial, different representatives within the organisation should be given specific responsibility for realising the benefits, as this enables the necessary organisational changes that may be required for the delivery of benefits to be accomplished (Scheepers, et al., 2022).

In the study that Hietala and Päivärinta (2021) conducted on the benefit realisation post the implementation of the ERP systems (which is a strategy project), the results revealed that **business cases are not always sufficient or non-existent** (Hietala & Päivärinta, 2021). In some projects that were studied, it was found that the benefits were identified, and the ROI calculation were created only when the project encounters resistance or when the funding approval requires it and even so, the benefits were not tracked throughout the project (Hietala & Päivärinta, 2021).

The study identified the challenges of benefit realisation implementation in the organisations as being the **difference in interests of the different business units**, the **unknown business processes**, the **insufficient or absence of the business case**, the **new requirements** that surface during project implementation, the **uncontrolled or lack of the benefit identification process** (Hietala & Päivärinta, 2021).

Marnewick and Marnewick (2022) did a study on benefits realisation in an agile environment, the study revealed that the problem is that the **business case is not utilised** throughout the project lifecycle (Marnewick & Marnewick, 2022). The analysis revealed that the business case is used to identify the benefits and not used for tracking benefits and sustainability (Marnewick & Marnewick, 2022).

According to literature, the BRM process is difficult to master as the challenges identified in various studies range from the BRM process not being fully implemented, not effectively setting

up the benefit targets and the confusion that exists on clearly identifying the benefit owner (Marnewick & Marnewick, 2022).

Another study completed to understand the challenges that are experienced in the application of the BRM approach in practice revealed that the benefit management process is **not solely a technical task** and also **not a linear process** (Aubry, Boukri & Sergi, 2021).

The two major findings highlighted from this study were as follows:

1. The process of **defining what the project benefits are or should be are not simple**; the process is rather a complex task as the understanding of the benefit concept may vary from person to person, even if they come from the same organisation (Aubry, et al., 2021). The other challenge being that the benefit identification process also involves different calculations, interpretation, and perceptions depending on who is involved, all which ultimately influences the Benefit Management process (Aubry, et al., 2021).
2. The benefit management **process changes over the different stages** of the project (Aubry, et al., 2021).

The changes noted at different stages include:

- a) Early in the project – benefit identification process at pre-initiation often includes both qualitative and quantitative benefits and the non-measurable benefits are seen to be dropped at some stage which may impact the critical benefits that may not be realised (Aubry, et al., 2021).
- b) During the project approval process – the process of project funding approval may influence the benefit management process as the project justification process can lead to overstating benefits and these may impact the ability of the organisation to realise the benefits expected (Aubry, et al., 2021).

- c) At completion of the project – the analysis revealed that the project benefits that were identified and planned at the early stages of the project are often neglected at the project evaluation stage, which is then a missed opportunity to ensure projects deliver the expected benefits (Aubry, et al., 2021).

## **2.8 Conclusion**

The literature review has covered the concept of Project Management and Benefit Management and has shown the link of the two concepts. It further highlighted the connection of the two concepts to the strategy of the organisation. Revealing the evolution of the view from the tradition approach to project management practices of ‘project management success’ towards ‘project success’.

The analysis outlined the different models that can be used by the different industries for the application of benefit realisation management and highlighted the key roles and responsibilities of the key project stakeholders concerning benefit management and project management.

The review also explored the factors that have been identified by previous authors pertaining the implementation of benefit realisation management and it was found that there are still gaps in literature that warrant future investigation of the practical implementation challenges of the BRM process and its correlation to the project success.

Further studies can also be explored in the different sectors which could provide more insights and contribution to this study.

## 3 CHAPTER THREE: RESEARCH METHODOLOGY

### 3.1 Introduction

This chapter discusses the research approach undertaken in this study. It provides an overview of the research philosophy, methodology and the approach used for the data collection process. The approach includes the research strategy followed, unit of analysis chosen, sampling, the instruments used to collect the data during the study, the tools used to analyse the data as well as highlight the study limitations and ethics considerations.

### 3.2 Research philosophy

A research philosophy is a belief system and assumptions on how new knowledge should be researched and developed (Saunders, Lewis, & Thornhill, 2009). According to literature the development of new knowledge involves assumptions made consciously and some not, these assumptions turn to influence the way in which the researcher understands the research question, it influences the methodology used and how the findings are interpreted (Saunders, et al., 2009). There are three major types of philosophical assumptions which are described below: 1) Epistemology, 2) Ontology, and 3) Axiology

#### 1) Epistemological assumptions

The human knowledge (Saunders, et al., 2009). Assumptions are concerned with the nature and the scope of the knowledge, it is simply “*concerned with how people come to know something and how people know the truth*” (Moroi, 2021, p. 129). The epistemology is important as it affected the researchers way of engaging with the study and it reveals how the investigation will take place (Moroi, 2021).

## 2) **Ontological assumptions**

The realities encountered in research (Saunders, et al., 2009). Assumptions are concerned with the nature of reality and concerned with the assumptions that are made by the researcher based on what makes sense (Moroi, 2021).

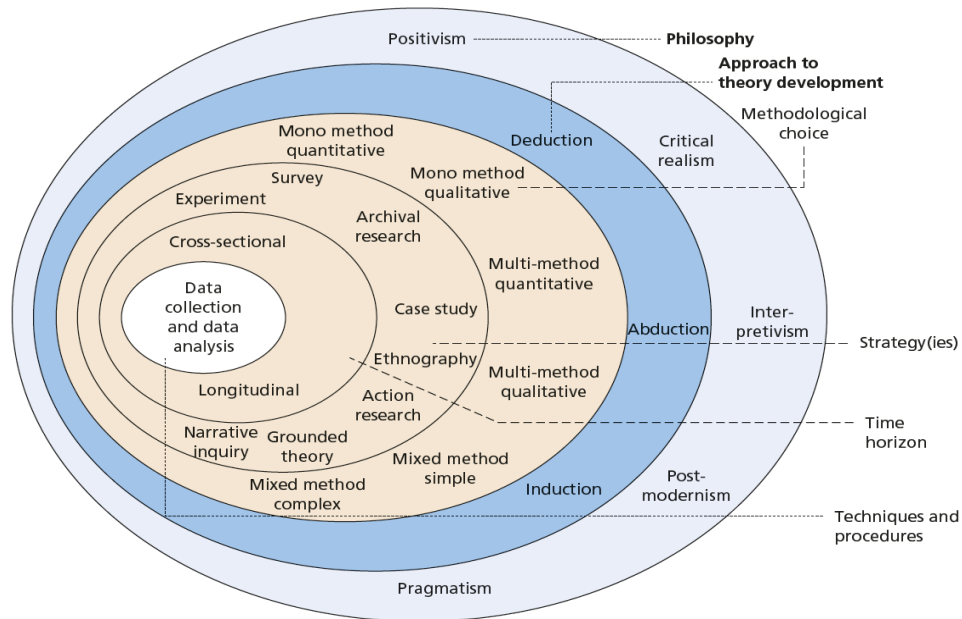
It is crucial in the understanding of how the researcher makes of the data gathered, as the reserachers ontological belief influences how they interpret the research questions and their significance and the approach to the data analysis (Moroi, 2021).

## 3) **Axiological assumptions**

The extent and ways one's own values influence the research process (Saunders, et al., 2009). Assumptpions are concerned with the roles of values in the research. Axiology takes into account the importance that researchers place on many of the components of their research, including participants, data, and audience.

An additonal assumption in philosophy is the **Methodology**. This assumption is concerned with the philosophies of data gathering, and determines the methods to be used (Moroi, 2021). Methodolgy is a typical research strategy that oulines the appropriate technique to do the research, it also comprises of the set of the philosophical assumptions that influence the understanding of the research question and the selection of the research methodology (Melnikovas, 2018). When thinking of methodology the researcher should ask themselves the question, "*What methodology and method will enable me to answer my research question?*" (Moroi, 2021, p. 130)

The research methodology formulation is based on the concept of the the "*Research Onion*" see Figure 9 which was proposed by (Saunders, et al., 2009).



**Figure 9: The Research Onion** (Saunders, et al., 2009, p. 124)

The research onion provides six main stages in layers that need to be completed to formulate an effective research methodology (Melnikovas, 2018). The starting point of the research methodology formulation is from the outside towards the centre of the onion. The first point is to start choosing the research philosophy, the approach, the method, and the strategy and determining the time horizons and then determining the main techniques and procedures to be taken for the data collection and analysis (Melnikovas, 2018).

### **Layer 1: Research Philosophy**

There are five main philosophical views that researchers take when initiating a research project, the views are namely: 1) positivism, 2) interpretivism, 3) pragmatism, 4) critical realism and 5) post-modernism

- 1) **Positivism:** reflects the philosophical stance of the natural scientist. The ontological assumptions are based on the objective observations and finding the event regularities based on causality, law and functional relations (Melnikovas, 2018).

- 2) **Interpretivism:** reflects the subjective ontological assumptions based on the existing or socially constructed realities that may only be researched through social constructions and is constantly evolving, thus the knowledge and the facts from this philosophy is relative and subjective (Melnikovas, 2018).
- 3) **Pragmatism:** is based on the assumption that research can adapt both the positivist and the interpretist positions based on the research question.
- 4) **Critical realism:** is based on the two ontological assumptions that, 1) there are real entities in the world and 2) we perceive the images and sensations of real entities and not the actual entities themselves.
- 5) **Postmodernism:** is based on a radically reflective axiology, Postmodernists seek to challenge conventional wisdom and give voice to opposing viewpoints that have been marginalised and suppressed by dominant viewpoints (Saunders, et al., 2009).

## **Layer 2: Approach to theory development**

Three main approaches to the theory development are:

- 1) **Deduction:** the study begins with an established theory, then poses a query or hypothesis, and then gathers information to confirm or reject the hypothesis (Melnikovas, 2018).
- 2) **Induction:** the study begins with data gathering and observation, then moves on to the description and analysis to develop a hypothesis (Melnikovas, 2018).
- 3) **Abduction:** the study begins with the discovery of a “Surprising fact” (Saunders, et al., 2009). Data is used to investigate a phenomenon, find themes, and clarify patterns. They can also be used to develop a new theory or modify an existing one, which is then tested, frequently through additional data collection (Saunders, et al., 2009).

### **Layer 3: Methodological choice**

Determines whether the study will follow a qualitative or quantitative approaches, or a combination of both methodologies referred to as the mixed method (Melnikovas, 2018).

### **Layer 4: Research strategy(ies)**

This describes the strategy or strategies to be used to collect and analyse the data with the options of an experiment, a survey, a case study, ethnography, archival research, grounded theory or a narrative inquiry (Melnikovas, 2018).

### **Layer 5: Time horizons**

This layer defines the research time frame. It classifies the time frames into two (Melnikovas, 2018);

- 1) **Cross-sectional or short-term studies:** collect data at a single moment in time,
- 2) **Longitudinal studies:** collect data periodically over an extended period of time to compare data.

### **Layer 6: Techniques and procedures**

Comprises of the process of collecting data and analysis, such as the using the primary or secondary data, selecting the sample groups, creating the questionnaire content, preparing for the interviews etc (Melnikovas, 2018).

## **3.3 Research method**

This study follows an ontological assumption that the benefits realisation management processes are not fully implemented in organisations which is then impacts the realisation of the benefits envisaged for strategic projects, thus affects project success. As such, an interpretivism philosophy was adopted to understand the perceptions of the benefit realisation on projects from the viewpoint of those who are accountable and responsible deliver project value.

The interpretivists study means to develop a fresh, more comprehensive understanding of the organisational realities and are said to focus to the participants lived experiences and cultural artefacts while incorporating both their own interpretations and the participants interpretations into the studies (Saunders, et al., 2009).

The theoretical development approach followed is that of inductive reasoning.

The inductive approach will assist in forming a conceptual framework from the data gathered to understand the phenomenon in the inquiry, identifying the themes and patterns to generate the new and the changing theory (Saunders, et al., 2009).

A research study can follow three research designs namely: 1) Quantitative research, 2) Qualitative research and 3) Mixed methods research and their definitions are outlined below:

- 1) **Quantitative research:** is defined as research that uses numerical data that is analysed through mathematical techniques, particularly statistics to explain a phenomenon (Yilmaz, 2013). It is further defined as research study form that is empirical of the human issue or social phenomenon and tests the theory based on the variables that are quantified and analysed using the statistics results to determine if the theory explains the phenomena of interests (Yilmaz, 2013).The foundation of the quantitative inquiry is positivism, as it assumes that there is a single, tangible and fragmentable reality (Moroi, 2021).
- 2) **Qualitative research:** qualitative research has been simplified in literature as the research that does not use the statistical methods or any means of quantification to get to the findings, this definition is not accepted entirely as it only focuses on the processes and techniques in the study and not the research design (Yilmaz, 2013). It is defined further as the study that aims at studying the individual people, cases, events, social situations, and processes in their natural environments using an emergent, inductive, interpretive, and naturalistic method to try and describe the meanings attached to the

experiences of the people (Yilmaz, 2013). The foundation of a qualitative inquiry is based on interpretivism and constructivism assumptions as it assumes that there are multiple, socially created and comprehensive realities (Moroi, 2021).

- 3) **Mixed Methods:** is the research that mixes both the qualitative and the quantitative methods to get a broader vision of the problem (Almeida, 2018). The research is used where there are possible limitations with using either the qualitative or the quantitative method (Almeida, 2018). It allows the researcher to gain insight from combining both methods.

This study follows a qualitative methodological approach as it attempts to understand the application of the BRM process and its value to the organisation, and the factors that affect the implementation of the BRM through the experiences and knowledge of those who are responsible for the implementation of the organisation's strategy through project initiatives. The qualitative approach was used in attempt to answer the research question which aim to provide an in-depth understanding of the information from the participants experiences, thoughts, feelings and frame of reference in their own words (Moroi, 2021).

### 3.4 Research strategy

There are several strategies that can be used to gather and analyse the data in research as shown on the research onion in Figure 9 which was presented by Saunders and company (2009). The qualitative interpretive nature of study calls for the collection of data from participants through observations, interviews and participatory activities (Moroi, 2021). Moroi (2021) further summarises the five different approaches that can be used in a qualitative research study to strategically address the research focus: 1) **Case study** used to create an in depth description and analysis of the case(s) in research, 2) **Ethnographic** used to describe and interpret a culture sharing group 3) **Ground theory** is used to create a theory based in the data from the field, 4)

**Narrative** is used to investigate a person's life and 5) **Phenomenological** approach is used to understand the essence of the experiences in research (Moroi, 2021).

The research strategy followed in this study is a case study approach.

A cases study is defined to be a contemporary phenomenon that focuses on unique situations that occur or that have occurred in the real-life context, the approach is appropriate when the context of the situation occurring is not clearly defined and cannot be controlled i.e. random, controlled laboratory experiments (Sneed, Nguyen, & Eubank 2020).

Literature identifies three common approaches to the case study design which are namely: 1) **Single case study**, 2) **Intrinsic case study** and 3) **Multiple case studies**.

The definitions and summary of each approach is provided below:

- 1) **Single-case study**: this study focuses on the specific individual, group or an organisation to provide insight to the inquiry (Sneed, et al., 2020).
- 2) **Intrinsic case study**: this study design is used to understand the aspect of a particular case or more (Gilstrap, 2009).
- 3) **Multiple or collective case studies**: this study also focuses on the specific phenomenon however the design contains more than one bounded case (Sneed, et al., 2020). This type of case study design is usually used by the researchers who follow a positivistic epistemology as it is believed to have more reliability and validity in research findings (Sneed, et al., 2020).

For the purpose of this study, a single-case study approach that follows a cross sectional or short-term time frame is used to make an inquiry on a phenomenon called the Benefits Realisation Management and its value to a private organisation within a specific area of focus at a point in time. The reason for this approach is because the single case study allows the researcher to focus on one specific organisation and specific population which is the executive members in the

organisation. A convenient sampling method applied was applied as the researcher is familiar with the senior members of the organisation and this facilitated the more in-depth investigation that was required.

### **3.5 Unit of analysis**

The unit of analysis the first step when analysing the data and defined to be the person, or the object from the organisation where the researcher collects the data (Kumar, 2018). The unit of analysis can therefore include the individuals, a group of individuals, an organisation or society of individuals, countries, technologies and the objects that the aim of the enquiry Kumar added.

In this research the unit of analysis is the ABC Group, which is a large multi-national organisation, in the retail sector listed with the JSE. Headquartered in the Western Cape Province, in the City of Cape Town with a total of 47 500 employees, the company operates in over 2000 locations across 24 countries.

### **3.6 Sampling strategy**

The ABC Group has a total of 110 executive and senior management team members from across the different functions with different portfolios. The research focus is on investigating the organisations approach to benefit realisation management in assisting them in realising the benefits set on strategy driven projects. Therefore, the study targeted the areas within the ABC organisation where strategy projects are implemented.

The areas found to have such projects were mainly the two functional areas in the business: Technology and the People and Culture (commonly referred to as Human Resources). The departments identified in these functions are the; Information systems, Information Technology, Shared services, Change Management, Payroll and Business process departments.

In the areas targeted, there are only 16 executive and senior management individuals and only 12 of the 16 were found to be involved and responsible for executing the organisational strategy

through projects, hence the selection of 12 individuals who were invited to participate in this study. The targeted individuals are heads of departments and normally are assigned senior roles on projects, such as project sponsor for those projects that are funded by the department, or project or process owner.

It is acknowledged that the other functions such as, Finance, and Supply Chain may have strategy driven projects the study sample was limited to the functions identified for resource capacity and the size of the research study.

### **3.7 Data collection strategy**

In literature the data collection methods are divided into two categories namely the **primary data collection method** and the **secondary data collection method**. Taherdoost (2021) defines the primary data collection method as the process of gathering the data by yourself for study purposes, that data is not published and therefore considered as first-hand information that is not manipulated by anyone. They added that the use of primary sources helps to gain quality data that improves results and gives the researchers an opportunity to contribute to the data when required or necessary, primary data collection sources include interviews, experiments surveys, and questionnaires (Taherdoost, 2021). On the other hand, secondary data collection methods are defined as the method of collecting data through published sources such as books, records, internet articles, and research articles (Taherdoost, 2021).

In qualitative research, data is gathered using the three main categories which are observations, reviews of documentation and in-depth interviews, these are regarded as the primary data collection methods (Taherdoost, 2021). Dewi (2021) states that in a qualitative study the data can be collected using the primary data sources such as the structured, semi-structured, unstructured interviews, surveys, focus group discussions, observations and also the use of secondary data methods where published data is reviewed.

In this study the data was collected by means of using semi-structured interviews, reviewing of published literature and documentation provided by the participating organisation as additional notes during the study.

## **Interviews**

Interviews are considered the fundamental way in which data can be collected socially as the researcher interacts directly with the participants in a way of asking questions and getting the answers from the participants which is different to the concept of questionnaires where data is collected indirectly (Taherdoost, 2021). There are three types of modes of interview methods that can be used, which are structured, semi-structured and unstructured interviews.

The structured interviews are interviews where the participants are asked the same set of questions in a standardised format with limited responses and a few open-ended questions where applicable, this kind is used in a setting where there is comprehensive literature about the research topic or can be used post the use of the unstructured methods to gain more understanding of the topic researched (Taherdoost, 2021).

Semi-structured interviews are formal and a questionnaire as a guide to conduct them, however the researcher may also probe where more detail is required during the interview (Taherdoost, 2021).

This kind is used where researchers are only given a single chance to interview the participants and therefore need to gain more reliable, clear, reliable and comparable data from the first interaction (Taherdoost, 2021).

Unstructured interviews are considered as informal interview methods that do not have a structure, no guide and the conversations are casual and Interviewers use quick notes to gather information and attempt to memorize the answers (Taherdoost, 2021).

The semi-structured interview mode was adapted for this study. A questionnaire was created as a guide to facilitate the conversations held with the participant's and to be able to focus the study to get more comparable, and meaningful data. The participants were given a chance to express their views based on their experiences, thoughts and feelings during the discussions.

The interview mode used was both face-to-face and the virtual option was provided to those who were not able to attend physically.

### **Literature and documentation**

The published literature such as the journal articles, books, conference proceedings online reports and documents from validated sources were reviewed to cover the main topics researched and validate the findings of this study.

## **3.8 Research instruments**

An email invitation for participation to this study was extended to twelve (12) Individuals in the executive and senior management teams. The individuals were all given the opportunity to voluntarily accept the invitation to participate and only ten (10) accepted the invitation.

A consent form was shared with all participants to give formal consent to participate and it was used as an instrument to make the participants aware of the process followed and that the interviews are to be recorded for reference purposes by the researcher, refer to **Appendix B:**

### **Consent Form**

A questionnaire was developed as an instrument to guide the interview discussions and to assist in collecting the data from the participants. An example of the questionnaire that was used is attached as **Appendix C: Interview Questionnaire.**

For the interviews conducted the setting was prepared by sending meeting invitations to each participant via email. For those who participated face-to-face, the researcher set up separate

boardroom sessions with everyone. For those who attended virtually, a Microsoft team link invitation was sent to the individual and the interview was conducted with the camera on for improved interactions. All interviews were recorded using Microsoft teams on the laptop device including those conducted in a physical setting.

The recordings were transcribed onto the answer sheet for each individual participant. An example of the transcribed interview is attached as **Appendix D: Interview Transcript**

### 3.9 Data analysis technique

There are several approaches for analysing the data, with thematic data analysis being one of the more widely used techniques in qualitative research. The thematic analysis approach was followed to analyse the data collected by following the six-step approach.

According to one definition, thematic analysis is *"an umbrella term, designating sometimes quite different approaches aimed at identifying patterns across qualitative datasets"* (Lester, Cho & Lochmiller, 2020, p. 97) and the method is deemed as broad and flexible to be used in various fields (Lester, et al., 2020).

Jackson, McDowall, Mackenzie-Davey and Whiting (2016) summarises the six-step phased approach recommended for analysing qualitative data as provided by Braun and Clarke below (Jackson, McDowall, Mackenzie-Davey & Whiting, 2016):

- 1) **Familiarisation:** familiarising yourself with the data through reading transcripts and listening to the audio recordings, making notes of the observations.
- 2) **Coding:** building solid foundations for theme development through coding the coding process. This process includes identifying relevant features and labelling them to identify the patterns in the data.
- 3) **Searching for themes:** researcher putting together the codes generated to create mappings and key data patterns.

- 4) **Reviewing themes:** ensuring that the theme generated are a good fit between the coded data and the entire data set.
- 5) **Defining and naming themes:** giving brief theme definitions and selecting the theme names for clarity of the concept of each theme.
- 6) **Writing the report:** this is the production of the final report with the analytic narratives and compelling data extracts.

The approach was chosen for this study and the information gathered through the data collection was then analysed using the six-step approach as follows:

- 1) **Step 1:** the researcher used the transcribed interview scripts and listened to the recordings obtained during interviews to familiarise themselves with the data.
- 2) **Step 2:** The researcher started developing a coding mechanism using Microsoft excel (manual) process by transferring all data gathered into the sheet. Using the different questions as a guide to allocate all responses relevant to the question into one bucket for ease of reference.
- 3) **Step 3:** The researcher then started looking for common themes in the responses provided by the participants. Different colours were used to identify common themes/ sentiments in the data
- 4) **Step 4:** The themes found were then reviewed across the data.
- 5) **Step 5:** Each theme was then defined based on the objectives of the study and clarity of the concepts studied; sub themes were also added where necessary.
- 6) **Step 6:** Finally, the data analysed through the themes was then outlined in chapter 4 of this report and the structure was presented according to the research objectives of this study.

An example (screenshot) of the excel coding matrix used is attached in **Appendix E: Data Analysis: Thematic Analysis**.

### **3.10 Research limitations**

The research constraints in this study include the lack of sufficient literature on the topic of benefits realisation or benefits management and its application in industry. Although there is literature on the BRM concept itself there is still a gap in the practical application of the process and its benefit to the organisations and ultimately its influence on project success.

There are inherited limitations with the study approach and instruments used, such as in the use of a single case study method, which focuses solely on a single organisation, and a particular area which is the strategy implementation projects. This limitation was inevitable as the study has time limitations and the size of study could only focus on a particular area at a point and time.

There might be a different outcome if an intrinsic or collective study methodology was followed or perhaps if other organisations or more departments within the organisations contributed to the study.

Furthermore, the collection of data through semi-structure interviews inherits the limitation of having some participants responses limited to the questions asked and some participants limiting their experiences and views to what is being discussed. Thus, the responses may be subjective, and some aspects of the topic may have been missed.

### **3.11 Ethical considerations**

#### **3.11.1 Research ethics approval**

Research projects should strictly adhere to ethical guidelines when dealing with human subjects (Alshenqeeti, 2014), since this study involved human participants from one private organisation it followed the ethical approach.

Approval was obtained through the UCT Engineering & Built Environment Committee as per the UCT ethics process and policy. Refer to **Appendix A: Ethics Approval** for the approval letter.

### **3.11.2 Participants consent**

At the beginning of each interview, the participants were taken through the objective of the study and were made aware of the ethics consideration of this study by the researcher. The individuals were given consent forms to fill out and sign as formal consent given to continue to participate in the study, which were all returned to the researcher and safely storage. The participants were also made aware of their right to withdraw from the study at any point and time during the study.

### **3.11.3 Confidentiality**

For confidentiality and to ensure that the participants and the participating organisation data is protected and that the data collected is only to be used for academic purpose, the participants and the organisation were given pseudo names. The participants are referred to as Respondent 1 , Respondent 2, Respondent 3 etc in no particular order and the organisation is referred to as “ABC” group.

All the discussions were recorded with consent of the participants and all recordings were stored safely in the researchers drive, the recordings were used solely for the research purposes and referenced during the data analysis and will be safely discarded post the completion of the study.

## 4 CHAPTER FOUR: DATA ANALYSIS AND DISCUSSION

### 4.1 Introduction

This chapter outlines the findings and analysis from the data collected. The chapter describes the case study chosen, followed by the findings from the data collected through the interviews. An analysis is made and the emerging themes from data collection are assessed, analysed and compared to the information that was found in the literature review.

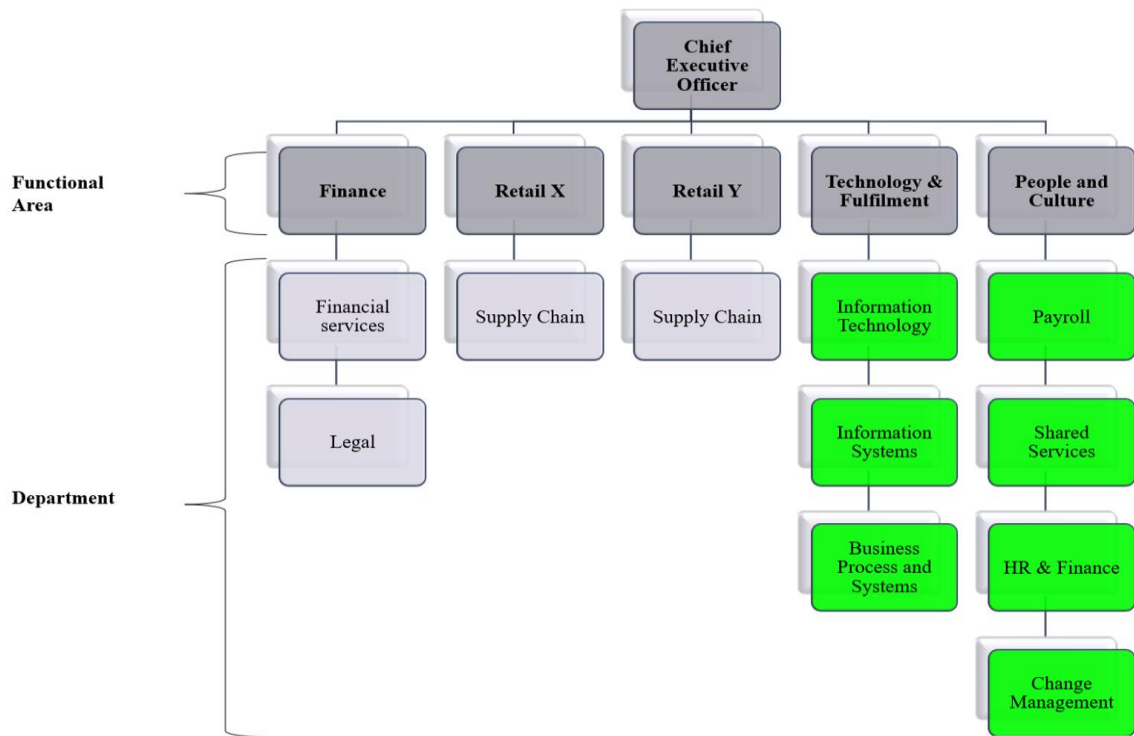
### 4.2 The Case study

#### **The overview of the organisation:**

As outlined in chapter 3, the participation invitation was sent to twelve (12) executive and senior management team members and only ten (10) accepted the invitation and gave consent to participate in the study.

The organisation is one of the leading retail groups in South Africa with a diverse range of brands. The organisation operates in a functional structure made up of several departments that consists of different specialities, skills, and areas of expertise.

A high-level overview of the ABC group's functional structure is shown in Figure 10. The functional areas highlighted in green are the areas which were identified as the targeted departments where strategy implementation projects are often initiated and implemented, as such the participants targeted for this study where from these areas.



**Figure 10: ABC Group Functional Structure**

**The participants:**

Participants are representatives of the targeted departments; they currently occupy permanent roles at senior or executive management level. The participants length of service in the organisation and their function of work was recorded for presentation purposes but was not used in the analysis.

Participant	Department	Number of years in the organisation	Location of the Participant	Interview setting/format
Respondent 1	Business process and Systems	23	Western Cape Province, Cape	Face-to-Face
Respondent 2	Information Technology	10	Western Cape Province, Cape	Online
Respondent 3	Change Management	15	Gauteng Province, Cape Town	Online
Respondent 4	HR & Finance	7	Western Cape Province, Cape	Face-to-Face
Respondent 5	Shared Services	17	Western Cape Province, Cape	Face-to-Face
Respondent 6	Information Technology	1	Western Cape Province, Cape	Online
Respondent 7	Information Technology	14	Western Cape Province, Cape	Face-to-Face
Respondent 8	Information Systems	2	Gauteng Province, Cape Town	Online
Respondent 9	Information Technology	2	Western Cape Province, Cape	Online
Respondent 10	Information Systems	8	Western Cape Province, Cape	Face-to-Face

**Figure 11: Research Participants**

**The interview setting:**

Eight of the ten (80%) participants were based in Cape Town. Some interviews were conducted in a face-to-face setting, and some virtually for those who could not be present physically. Only two (2) participants were in a different location and the interviews were conducted virtually from the Gauteng province, Johannesburg. All interviews were completed on a one-on-one basis and each interview duration ranged between 45 minutes to 1 hour.

**4.3 Theme 1: How project benefits align to the strategic objectives of the organisation**

The participants were asked if they think the project benefits in the organisation were aligned to the organisation’s strategic objectives. The responses show that most of the management at ABC

believe that the project initiatives are aligned with the company strategic objectives but not always.

Eight of the ten (80%) of the participants agreed that most projects are aligned and agree that this is not the case for all project initiatives.

**Respondent 2:** *“Yes, they are aligned but not all of them. Project prioritisation is based on alignment with the strategies though some aren’t, they still get executed but maybe done later or prioritised for risk mitigation”*. **Respondent 5:** *“Yes, for big projects that require significant funding they are because they have to be presented for funding and often have a business case that is aligned to the company strategy for the board and finance committee, and we prioritise the projects that are aligned to the strategy”*.

**Respondent 6:** *“Yes, I think 25% of the project benefits are aligned to the strategy but not all.”* **Respondent 8:** *“Ideally it should be aligned, with each investment objectives are always linked to the company strategic objectives although not all project and benefits align or meet the objectives of the organisation. These are some of the initiatives that happen outside of governance”*.

Although most of the participants agree that the investments are not all aligned to the company’s strategic objectives there was one respondent that believes that all the projects executed are always aligned to the strategy.

**Respondent 3:** *“Yes, our projects are aligned to our strategy”*.

Another respondent agrees that the project benefits are aligned to the company’s strategy, however during the discussion, they started referring to the values of the company as the strategic objectives,

**Respondent 1:** *“Yes, they are aligned. The company values are Customer Service, Working Fast and Smart, and Doing the right thing”*. Referring to one of the projects that

they have implemented the respondent added, *“the project benefits were to enable the schedulers to do it faster and efficiently, which benefited the company on cost as over-time was monitored and reduced also paying the right salaries to employees”*.

#### **4.3.1 The responsibility of identifying project benefits**

The question asked to the participants was, who identifies the project benefits at the inception phase of the project and who ranks them? The question of responsibility was broken into two parts where the first one was in relation to the responsibility of the benefits identifier and second one was related to the responsibility of prioritisation and ranking of the benefits within the organisation.

Based on the findings there are various roles involved in the process of identification of project benefits. Nine of the ten (90%) of the participants identified the responsibility of identifying benefits as a combination of mainly the project owners together with the project sponsor, in which this category of individuals are mainly the members of the executive or senior management teams and the top management teams respectively.

Other participants added that the identification of benefits does not only involve the project owner, or the project sponsor but also other stakeholders such as the Project Manager who are responsible for the execution of the project as well as the operational teams in the organisation who are ultimately the end users of the project deliverable, in strategic projects often being the systems implemented.

Although the participants have identified a combination of roles to be responsible for the identification of benefits there is still no consensus on who this responsibility is assigned or should be assigned to at ABC.

## **The project owner**

Six of the ten (60%) participants have highlighted that the identification of benefits at ABC is the responsibility of the project owner or project initiator.

**Respondent 1:** *“The project Owner...”* **Respondent 2:** *“Project Owner and product owners and supported by the Chief Technology Officer (CTO) who is the head of department”.* **Respondent 8:** *“Project owner, Heads of the departments or benefits owner normally identify the benefits...”*. **Respondent 9:** *“Typically, it is the project initiator or requester who normally are the Heads of businesses, or business executive managers that identifies the benefits...”*. **Respondent 10:** *“Business Executives and Heads of Departments normally identify the benefits...”*

## **The project owner, project sponsor and project manager:**

Two of the ten (20%) participants have identified three roles as the main roles responsible for the identification of project benefits which include: the project manager, the project owner and project sponsor.

**Respondent 3:** *“The board evaluates the benefits identified by the Project or Product owner, and the Project Manager”.* **Respondent 7:** *“It’s a combination of the business that initiates it based on the business need. It would be a combination of the Project Manager, Project Sponsor and the SME’s. The Project Manager would then present it to the project board and for approval”.*

## **The project owner, and project sponsor**

One respondent has identified the responsibility of the identification of project benefits to remain with the two common roles being the project owner and the project sponsor, however,

argue that the responsibility should be extended to other teams within the operations such as the end users, they added:

**Respondent 4:** *“In an ideal world, all role players involved should be part of the benefits identification process, including the users, the technology support teams, sponsors and owners”.*

One participant has identified the responsibility for identifying benefits to be that of the project sponsor.

**Respondent 6:** *“Project sponsors, or heads of departments”*

### **4.3.2 The responsibility of ranking project benefits**

#### **The ABC Board**

Eight of the ten (80%) of the participants have mentioned that the board evaluates and ranks the project benefits identified by the various roles as outlined above. They agreed that once the project benefits are identified, they are presented to the board for approval, as most of the project investments require funding from the board and the board then evaluates the projects based on the benefits presented and prioritise them accordingly. Prioritisation includes the ranking of the project benefits based on the alignment of the benefits to the organisation’s strategy.

**Respondent 1:** *“I (as the project owner) identified the benefits and chose the top 5 benefits using research and consultation with industry experts and present the benefits case to the board for approval and prioritisation”.* **Respondent 9:** *“...the prioritisation is decided at the board level”.* **Respondent 10:** *“...the benefits identified are presented to the board for ranking”.*

Two participants identified the role of ranking project benefits to a combined effort between various stakeholders which include the board members in the business which include, the project sponsor, project owners as well as the steering committee (the board).

**Respondent 8:** *“Project owner, Heads of the departments or benefits owner normally identify the benefits and ranks the benefits collectively”*. **Respondent 5:** *“The ranking is then between the sponsor, steering committee, they then rank or re-rank them to highlight the immediate and tangible benefits”*.

#### **4.4 Theme 2: Understanding the processes followed in ensuring project benefits are realised**

The question asked was to understand the processes followed in the ABC group in relation to benefit realisation or a similar technique used. Firstly, the participants were asked to confirm their understanding of the measure of project success within the ABC group whether the projects were deemed a success at the stage where the project deliverables are met (output) or when the project benefits are realised.

The second question was to understand if ABC has any process or similar techniques followed for benefits management.

##### **4.4.1 Projects success based on project objectives or benefits realised**

The participants highlighted that at ABC group project success is based on the delivery of the project. Most of the participants elaborated that the success is based on the iron triangle constraint phenomenon, All the participants highlighted that the project success at ABC group is often based on the completion of the project, on time, on budget and the agreed scope. They all agreed that the projects are often signed off at completion and closed off before the benefits are measured or realised.

The participants commented:

**Respondent 1:** *“When the project objectives are met. It (project success) is always dependent on the time, cost and quality criteria.”*

**Respondent 4:** *“I think we walk away from projects too soon and thus only measure at the point when the project objectives, on time, on budget and delivery of the product are met and not necessarily when the benefits are realised”.*

**Respondent 9:** *“When the project objectives are met the project is completed and signed off. The benefits are more long term, and we never get there especially with the big projects”.* **Responded 10** added, *“...No one measures the benefits of the projects post the projects unless it’s done outside my knowledge. However, I think success must be linked to the project benefits and the realisation of the benefits”.*

Although the participants share the sentiment that the project success is based on the project objectives being met in the organisation, they shared some of their views where they strongly believe that the project success measure should be based on the project benefits realised as opposed to the objectives only.

The participant shared their thoughts:

**Respondent 2:** *“It (project success) should be both (when project objectives are met and benefits realised). However, currently we do either one, some projects are deemed a success at the project completion phase, and some are evaluated against the benefits case presented to the board”.* **Respondent 3:** *“It depends, but for me it (project success) is the adoption of the systems and utilisation by the end users. With every project comes a change in process and if the stakeholders have not adapted to the change this becomes a risk of failure of implementation”.* **Responded 5:** *“Officially it’s when the project benefits are realised, however I think we turn to fall into an early success and stay there when the project is implemented successfully, on time, in budget, with the right quality and when things are working”.*

#### 4.4.2 The Benefit Management technique used at ABC

The participants were asked if there was a technique or similar approach for benefit management that is followed to ensure that the benefits are derived from the output of the projects.

Six of the ten (60%) of the participants said that there is somewhat of a process. They confirm that although there may be a process or tool utilised in each business or department, the process is not consistent for all projects and that not all the parts of benefits management realisation are covered. The sentiment is that the business process or tools available currently are mainly to assist in identify the benefits and get the funding however, the element of tracking the benefits and measuring benefits is still missing.

The participants commented:

**Respondent 5:** *“There was a process that the IT department implemented. This process was a minimum standard for the standard business case document which included BRM and a template guidance on qualitative and quantitative examples. They then probed the process governance, but I don’t think it is followed diligently. The process being followed is always left to the individual and not always followed or deeply interrogated”.*

**Respondent 6:** *“We do (have a process) in some departments; we have different approaches on different departments. I think there is tracking in some areas, there is certain good tracking, indirect tracking but there is still a big portion with no tracking at all”.* **Respondent 8** added that, *“There is a process, but I don’t think it’s being followed. The benefits are tracked informally using a tracking tool, but it is done outside of the governance process”.*

Three of the ten (30%) of the participants confirmed that, there is a process that is followed to identify the benefits and ensure that all the benefits are documented. They added that the

processes have also helped in ensuring that the benefits identified are valid and clear before the projects are kicked off,

**Respondent 1:** *“I think the business does use the benefits requirements management as we did journey maps, time studies and several workshops with different audiences to try and ensure the benefits identified are valid”*. **Respondent 3:** *“Yes, we are required to have record of the specific benefits acquired from the project and promised values presented to the board. BRM gives you a clear understanding of the why of the project, and impact of the project. Having it from the onset also allows you to amend the business strategy to align to the benefits to be realised”*.

**Respondent 9:** *“I think it’s (the BRM technique) different for the various teams. For my department it’s about being able to show the benefits and values before we get the project started. The project value is defined in advanced and that’s how projects are prioritised”*.

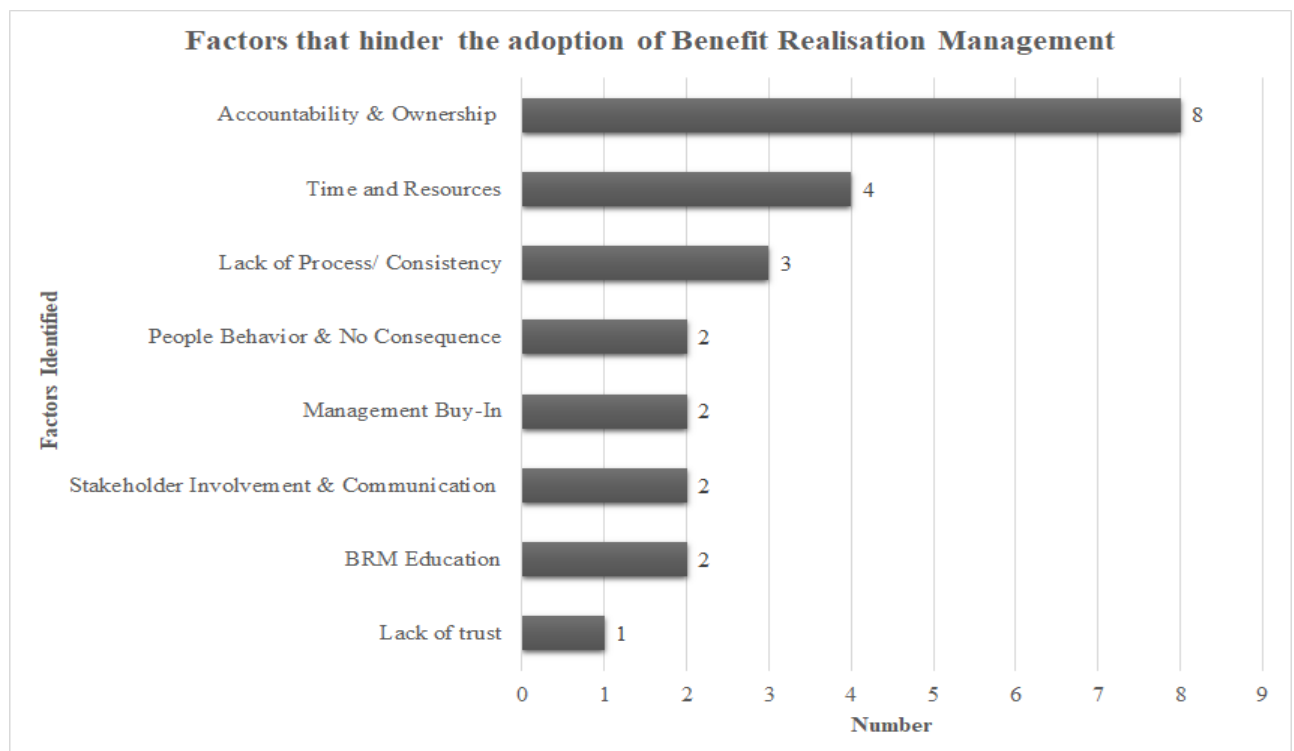
Only one respondent opposed the sentiment that there is a technique utilised in the organisation at all.

**Respondent 2:** stated that, *“No, we don’t use the BRM technique, the process is broken. We currently don’t use the Project Managers to assist in this process, but the responsibility is often left with the PMO which includes only the Project governance and Strategy office to drive and measure the benefits, and they are not doing anything about it”*.

#### **4.5 Theme 3: Factors that hinder the adoption of BRM**

The participants were asked to give the factors that may be impacting the adoption of the BRM in the organisation. The participants identified eight key factors, and these were grouped and ranked by the number of participants that shared the same sentiment.

The key factors as shown on Figure 12 are the main challenges that the ABC faces which hinder the adoption of the benefits management process.



**Figure 12: The common factors identified as the hinderances to adopting the BRM process**

The top 3 key factors identified are the, 1) Lack of accountability and ownership, 2) Lack of time and resources, 3) the Lack of BRM process itself and consistency in the process applied.

#### **4.5.1 Accountability and ownership**

Eight of the ten (80%) of the participants identified the Lack of accountability and Ownership as the main challenges that lead to poor adoption of the BRM process. The participants highlighted that the problem is that people fear taking accountability due to the fear of the benefits not being realised.

The participants added that the accountability of benefits is not always known or clear from the onset between the project owners, and the project managers.

**Respondent 8:** “...people are scared to take accountability and ownership of the benefits as they think may affect their job security if not met”. **Respondent 10:** “people fear taking ownership of the benefits that may not be realised and making decisions in case they are wrong”.

Respondents 2 and 10 agree that the accountability of benefits should lie with the project owner or product owner. Respondent 3 stated that the overall project realisation of benefits is impacted by the unclear accountability of the project manager on the project itself.

**Respondent 2:** “Accountability Misplaced the accountability is not with the project owners or product owner and thus nobody is accountable to manage the process”

**Respondent 10** added, “Accountability of the project benefits is misplaced - It is often left with the project delivery team. The benefits owner is not the one who is held accountable for the delivery, and this is because of the company structure”. **Respondent 3:** “if the project manager is not clear on accountability or in full control of the project it may impact the adoption of the BRM process. Accountability lies in every stream and if PM is not in full control of every stream, then it will have an impact on the project overall realisation of benefits”.

#### **4.5.2 Time and resources**

The second main challenge identified by four of the ten (40%) participants is the Lack of time and resources. The BRM process is considered to be a time-consuming process. To track and measure benefits the process requires resources, effort and this takes time. The participants highlighted that the challenge is that often people who need to manage the process have no capacity to look back on a completed project as there are no dedicated people assigned to Benefit Management and ensuring that the benefits are realised. Another respondent added that the challenge is that the people move on to the next project when one project is completed.

**Respondent 8** explained that *“it’s time consuming to track benefits because you need the right data and need to monitor it over time and that requires resources and effort. People often say they don’t have the time to track benefits”*. **Respondent 9** also added, *“the main challenge is that when one project is completed, we move on to the next project and never go back to the old project to measure”*.

The third common factors identified as the hinderance to the adoption of BRM process were identified by 3 of 10 (30%) of the participants as, the lack of the BRM or consistency in the process followed.

#### **4.5.3 Lack of BRM process and consistently**

The lack of the BRM process or similar technique was linked to the organisations culture of moving on to the next priority project too quickly once a project is completed. The participants agree that BRM is not considered as part of the project management process. In some instances, the participants mentioned that the BRM process itself is not correctly implemented and therefore cannot be enforced.

**Respondent 2** stated that the BRM process is *“broken”*, *“...we need to look at the BRM technique or process to implement it correctly”*. **Respondent 6** highlighted that the lack of process leads to the misalignment in those who determine strategy and vision, *“The BRM process is currently left on people to decide what they want to measure, therefore we need to get everyone to understand the BRM process and it’s link to the strategy will enable the responsible persons to implement the correct thing”*. **Respondent 9** added, *“...set it up (the process) as a prerequisite before the project even starts”*.

The inconsistency in identifying benefits and how benefits are measured was also identified and this is linked to the time pressures from the organisation for the management to deliver projects and often leads to less time spent on planning and getting all the requirements documented,

another respondent mentioned that there is inconsistency in what is deemed a benefit and when it must be measured.

**Respondent 4:** *“There is inconsistency in measuring the benefits...”*

#### **4.5.4 People Behaviour and no consequences**

The people behaviour was identified as a challenge, and this is due to people in the organisation that are often stuck in the *“old ways of doing things”*. The participants explain that people often take time to adapt to the changes implemented and little to no consequence to not doing the right thing in the organisation is identified as the issue that influences the poor people behaviour and ultimately the poor adoption of BRM.

**Respondent 1:** *“...sometimes it takes longer to realise benefits if there’s little to no consequence to doing the wrong thing”*.

#### **4.5.5 Top Management buy-in**

Top Management (Leadership) buy-in was also identified by some of the participants, they added that there is a lack of interest from the sponsors.

**Respondent 7:** *“the Management (including Top Management) is not used to it, they are often not interested and see the benefit tracking as an additional overhead process”*.

#### **4.5.6 Stakeholder involvement and communication**

The lack of stakeholder involvement & communication was identified as an issue. Not involving all stakeholder that are part of the project leaves gaps in ensuring all teams are aligned to the same strategic goals which ultimately influences the benefits realisation.

The participants commented:

**Respondent 4:** *“Not involving all stakeholders and understanding how their goals are linked to the business strategy. The business strategy is always long term than the*

*operational strategies and the gap is often overlooked as the priorities of the different stakeholders then differ at the point in time”.*

#### **4.5.7 BRM education**

The lack in BRM education was identified as a challenge. The participants mention that there is lack of awareness of the BRM process and the benefit knowledge within the organisation which eventually contributes to the poor adoption of the process. The participants argue that not everyone understands what BRM is and not everyone is on the same level of understanding of what the benefits should be.

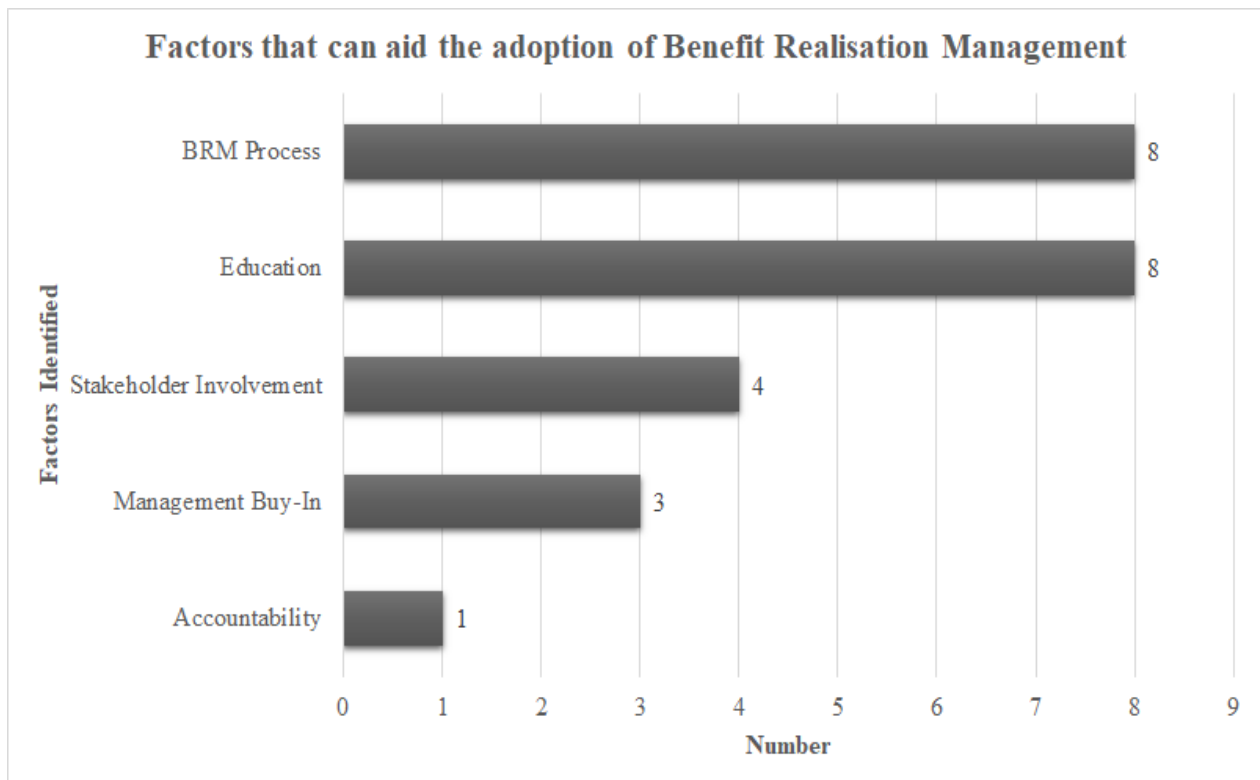
**Respondent 9:** “...*the actual benefit itself needs to be set based on research and not an assumption of what the benefits would be”.*

#### **4.5.8 Lack of trust**

Another factor that was identified by one of the participants is the lack of trust from the stakeholders or the people who influence the benefits realisation due to historical experiences where the management had previously made “empty promises” on the benefits to be realised post project implementations.

### **4.6 Theme 4: Factors that can aid the adoption of BRM**

The participants were asked to give the factors that they believed can assist in ensuring that the BRM process is adopted within the organisation. The participants identified five key factors, and these were grouped and ranked by the number of participants that shared the same sentiment. The key areas are shown on Figure 13 as the main factors that will aid the adoption of the BRM process in ABC Group.



**Figure 13: The common factors identified to enable the adoption of the BRM process**

The factors identified include 1) BRM process, 2) Education on the BRM concept and the process, 3) Stakeholder involvement and 4) Top Management buy-in and 5) BRM Accountability.

#### **4.6.1 BRM Process**

Eight of the ten (80%) of the participants agree that the BRM process needs to be established with clear role and responsibilities.

The participants commented:

**Respondent 2:** “We must re-look at the BRM process for the organisation, map the entire process and define clear roles and responsibilities”. **Respondent 3:** “BRM is an ongoing process from project inception - Monitoring the benefits and savings during the project and not waiting till the end of the project”. **Respondent 5** added that, “we must build in meaningful pit

*stops when the project is completed to be able to track and monitor the benefits, keep the project open till benefits are tracked”.*

Some added once the process is set up there must be a way to enforce the process adoption by way of ensuring that the benefits are clearly defined upfront, interrogated, tracked and monitored.

**Respondent 5** also added that, there must be a *“Deep interrogation of the benefits identified in the business case, ensuring the benefits are not overly optimistic and are measurable before the project even starts”*. **Respondent 10** stated that, *“Process – there must be a process in place to allow the project delivery team to execute the measurements of benefits and present it back to the board”*.

Having a data driven culture - which will enable collecting the correct data and the ability to measure the correct matrices. **Respondent 6** *“Have a data driven culture - collect the correct data to be able to measure the correct matrices”*, they also added that, Aligning the organisations incentives to the BRM process - this will encourage the people to focus on the realisation of the benefits and not only on the delivery of the project. *“...You need to align the incentive programme to be based on the benefits to be realised based on the vision then everything will be measured and tracked against that”*.

#### **4.6.2 BRM education**

Another top identified factor is education, this is in relation to the awareness and understanding of the BRM process within the organisation. Eight of the ten (80%) of the participants highlighted the need to ensure that the organisations management and other stakeholders involved on strategy projects are educated on the concept of BRM to aid the adoption of the process.

**Respondent 2:** *“there may be a need to educate the organisation on BRM...”*.

**Respondent 6:** *“Understanding the concept of benefits realisation. Most people who*

*understand the success metrics or BRM usually understand the strategic objectives”.*

**Respondent 10:** *“leaders need to be more knowledgeable on the benefit realisation management process in order to support it and to be able to hold people accountable”.*

#### **4.6.3 Stakeholder involvement**

The third factor highlighted as the key factor that could aid the adoption of BRM is stakeholder involvement. The four of the ten (40%) of the participants agree that more stakeholders should be made aware of the process, involved from the onset. They added that the organisation should be more transparent with the stakeholders on the benefits and communicate to all people who in turn will support the process.

**Respondent 2:** *“involving the people that are directly impacted by the changes earlier in the project and throughout the journey of the project. Involving them in selecting the solution, scoring proposals and understanding what the benefit is”.* **Respondent 3:** *“Involve the employees in the project make them understand the project and make them feel like they are part of the decision-making process”.*

#### **4.6.4 Top Management buy-in**

The fourth factor highlighted as key in the adoption of BRM, is the Top Management buy-in, three of the ten (30%) of the participants highlighted the importance of obtaining the support from the leadership in the organisation to be able to get the BRM process implemented and adopted within the organisation.

**Respondent 1** highlighted that, *“top management support is critical as they can guide the teams with adaptation when they understand the strategic intent of the benefits to the organisation. It also helps to remove barriers along the way of implementing the project”.* **Respondent 7:** *“Buy-In from the business executives is important to support the BRM initiative”.*

#### 4.6.5 Accountability

Having people accountable for benefit realisation and having consequences where there is none (realisation of benefits) will aid the adoption process. **Respondent 5** said: *“have people accountable for the realisation of benefits and also have consequences in place for not realising those benefits”*.

### 4.7 Discussion of findings

#### 4.7.1 Theme 1: How project benefits align to the strategic objectives of the organisation

The management of ABC group have highlighted that the project benefits are often aligned to the strategic objectives of the organisation even though this is not the case for all projects. The majority highlight that the funding process at the organisation involves the executive or senior managers collating the anticipated benefits of the investment, document the benefits and presenting the benefit case to the ABC board committee for funding approval.

The findings reveal that for the funding approval the ABC board requires that all projects' initiatives show the benefits and alignment to the company's strategy. The board then evaluates all the presented projects or investment initiatives, prioritises and ranks them accordingly before approval. This process evidently enables the management teams to ensure that all the project initiatives that require funding are aligned to the strategic objectives of the organisation as the lack of evidence of alignment may affect the funding and approval.

This revelation reinforces the findings in literature that, most of the organisations select and prioritise the projects using the financial and non-financial techniques and the results from the evaluation models, while the management teams in the organisations initiate the projects to deliver on the business strategy (Serra & Kunc, 2015). Another revelation is that, although the project benefits for projects that require board approval at ABC are aligned to the organisation's

strategy, there are some projects that are still not aligned to the strategic objectives which are those projects that require do not require funding approval as the investment amount is minimal, these projects are therefore not forced to necessarily align to the strategy and hence some do not follow the governance process. According to literature, project governance is one of the critical factors in the project success criteria as it allows for rules and procedures to be followed for specific projects (Zwikael & Smyrk, 2015), literature further reveals that project governance enables a successful delivery of projects and enables benefit realisation (Musawir, et al., 2020), ABC is faces a risk of not realising project benefits or value and ultimately achieving project success through some of the initiatives that slip through the governance process.

Another key finding on benefit alignment is that there is a lack of understanding of the difference between the company's "*strategic objectives*" versus "*values*" which was revealed during the interviews. One of the participants understood the company's strategic objectives to be the same as the company values and thus, their understanding was that delivering projects that enabled the company values or living the company values through projects meant delivering projects that are aligned to the strategy of the organisation. Although the primary study of this research is not to probe the senior management teams understanding of the company's strategic objectives or values, this finding reveals the potential misalignment in the management and the leadership team's interpretation of the strategy, this has an indirect impact on the ensuring that the alignment of project benefits to the strategic objectives of the organisation.

Given the different understanding of the strategic objectives of the organisation versus the benefits of a project. The researcher described the definitions of the terminology to the interviewees as defined in this research study to guide the participants and gain common understanding of the terminology used in this research.

Connected to the understanding of the strategic objectives of the organisation is the BRM education, this factor is identified as one of the key factors that influence the adoption of the BRM process, it has been identified as a hinderance and potential aider as management believes that education and awareness of the BRM process may influence the adoption of the BRM process, this includes the knowledge of what process is, what the benefit is, who is responsible and its alignment to the strategic objectives of the organisation.

### **The responsibility of identifying and ranking project benefits**

Despite there being different techniques followed in the approach to benefit management, the common steps in the BRM process involve, the identification of project benefits, benefit planning, the delivery, measuring benefits and reviewing benefits (Jerónimo & Pereira, 2021).

In the process of probing alignment of project benefits to the organisation's strategy, the ABC management were asked to comment on their views of the responsibility of project benefits identification and the ranking of benefits within the organisation which are the critical first steps in the BRM process.

**A sole responsibility:** More than half of the senior management team have highlighted that the responsibility of benefits identification lies with the **project owner** (often the Head of department), at ABC the project owner is generally the process owner. Only one participant identified the responsibility to be that of the **project sponsor**.

**A shared responsibility:** Some of the ABC management believe that the benefit identification process is not a sole responsibility and that this is shared months more than one person. The combinations provided as responsible are the **project owner**, the **project sponsor** and the **project manager** and the other is the **project owner** and the **project sponsor**.

The analysis has revealed a common role which is the project owner who is also said to be the process owner.

Literature does not specifically identify the process owner as one that identifies benefits however it highlights that the process owner drives the benefit management process outcomes (Zwikael, 2016), therefore suggesting that the process owner should be involved from the onset of identifying the benefits throughout the process of benefit management till the end when the benefits are realised.

Another role that has been commonly identifies as key to the identification process is the project sponsor This revelation agrees with the literature that the role of the project sponsor is to clearly define the goals for the projects by utilising available tools like the benefit mapping and ensuring that the benefits are realised (Opoku & Tallon, 2019).

In summary, the analysis show that there is no consensus on who the responsibility for the identification of project benefits should be with at ABC as some of the senior management team believe that apart from the executive management and top management teams, **the project manager** is also responsible for this process even, they argue that the project manager should be involved in the process of identifying project benefits as they will ultimately be held responsible for the project delivery.

Although the project manager role has been identified as another role that has the responsibility of identifying project benefits in the analysis.

The literature findings revealed that the project managers are often not yet assigned to the project when the project benefit case is established at pre-initiation phase and thus the identification process is not within their scope of management. The project managers are often assigned to the project at initiation stage and are expected to deliver the project deliverables (Mossalam & Arafa, 2016). In the study that Mossalam and Arafa did they recommended that the project manager needs to be involved at the early stages of the project where they can help with preparing the business case (Mossalam & Arafa, 2016).

The other participants suggested that there is a need to involve other stakeholders in the benefit identification process, they identified the **operational teams** such as the end users and support teams. These roles were not revealed in literature as key to the identification process. Thus, this insight was gained as part of this study.

Although the other stakeholders either than the project sponsor and project managers roles are not explicitly defined in relation to the project benefit identification, literature highlights that there are various roles that are responsible for the benefit realisation management process itself, which includes:

*“...the business change manager, project sponsor, project manager, programme manager, project steering committee, finance and audit team and business process owner/operations/end-user of the asset.”* (Mamabolo & Marnewick, 2022, p. 4).

The managements response to the ranking of project benefits responsibility reveal that at ABC, post the project benefit identification and documentation of the benefit case phase, it is the responsibility of the project owner or the sponsor, in some areas the project managers to present the benefit case to the organisations board, this is done mainly for funding approval and prioritisation of the benefits presented and it is based on the initiatives alignment to the business strategy. The analysis reveals the responsibility of ranking benefits is often with the board of the organisation unless the project is does not require funding from the board. This insight was not revealed in literature and therefore, was gained as part of this study.

#### **4.7.2 Theme 2: Understanding the processes followed in ensuring project benefits are realised**

The ABC senior management team highlighted that their perception of **project success** is based on the traditional approach to project management which is based on the project objectives being met using the triple constraints criteria which is delivering the project on time, on budget and

the agreed scope. The senior management team reveals that the ABC the project team usually focuses only on the deliverables of the project and completing the project and then the team often moves onto the next project and never really look at the benefits obtained from the project.

Literature distinguishes between the project success and the project management success, where project management success is measured through the traditional approach using the iron triangle parameters of time, cost and quality while the project success is based on the project achieving its objectives in line with the organisations strategic objectives (Abylova & Salykova, 2019). The view of project success has evolved over time and literature reveals that this view is a short term view and this is simply defined as the project management success, while the project success is more of a long term view of project effectiveness as it focuses on achieving the business strategic goals while considering the customer satisfaction (Lalic, et al., 2022), the ABC group has therefore not yet evolved in their perspective of project success.

The senior management team acknowledged that the view of project success should be based not only on the project objectives but also the anticipated benefits realised. It was evident that the participants are aware of the changing view of project management and the economic shift towards the long-term view of success of projects even though they still implement projects based on the traditional approach.

The process of **benefit realisation management** is not embedded in ABC's project management processes followed. The senior management team acknowledges that the benefits identified upfront in the business case are often not tracked or reviewed and therefore may not always be realised as the project is deemed as successful only when the project activities are completed which does not include the benefit review process.

The participants have revealed that there are different tools and techniques that are available within the different departments, which are used to assist to identify the anticipated benefits,

document the benefits so to obtain project funding. The process of tracking and measuring the benefits is where the gap is across all the departments. The management mentioned that the tools known to them is what they use and assume that other departments also use their own preferred tools or methods to identify benefits, thus the analysis highlights that the only common thing in the process followed at ABC is the process for benefit identification, documentation and funding approval process, beyond this all the departments follow their own processes for project delivery and benefits (if any). These findings are not fully compliant with the BRM process. The main steps in the BRM lifecycle identified in literature are, the identification of benefits, planning for benefits realisation, executing the plan, reviewing and evaluating results and sustaining benefits (Jerónimo & Pereira, 2021), it is evident that the process is not formally defined and not fully implemented in the organisation, as the benefits are not reviewed, and or sustained. This finding agrees with literature that with no systematic approach to managing benefit realisation and no formal approach to managing projects there's going to be poor benefit management and ultimately the impact is that project benefits may not be realised (Hietala & Päivärinta, 2021)

### **4.7.3 Theme 3: Factors that hinder the adoption of BRM**

The factors identified as a hinderance to the adoption of the Benefit Realisation Management process are the Lack of accountability and ownership, Lack of time and resources, Lack of process and consistency, People behaviour and no consequences, Lack of Top Management buy-in, Stakeholder involvement and communication, Lack of BRM education and the Lack of trust.

The **lack of accountability and ownership** from the ABC senior management team was identified as a key factor that hinders the adoption of the BRM process. The sentiment is that accountability and ownership is not always taken by those who are supposed to take it.

The study revealed that there is a cultural challenge which was also linked to the lack of accountability and ownership within ABC.

Furthermore, besides the lack of accountability there is no consensus on who should take accountability and ownership of project benefits.

The senior management team was also not certain on who the project benefit owner should be between the project sponsor, the project manager and project owner. The BRM roles and responsibilities were not clearly defined at ABC as the process also was not formalised. This uncertainty of accountability and ownership is also evident in literature as the study undertaken by Mamabolo and Marnewick (2022) confirms although the project sponsor, the business change manager, project or programme manager are identified as the key roles that should be involved in benefits realisation however, there is still no consensus on who the benefit process responsibility and accountability should be on (Mamabolo & Marnewick, 2022).

The second highest factor identified is the **lack of time and resources** to track and measure the benefits at ABC. With the lack of process standardisation there are no dedicated resources assigned for the BRM process at ABC. The findings show that the project team is only assigned to deliver the project and when the project is completed, they are expected to move on to the next project. The ABC senior management team have highlighted that the project teams, project sponsor, and project owner usually don't have time to concentrate on the benefits of the project and tracking them, they added that this is because they have day-to-day job commitments apart from the project deliverables. They also state that the project manager is assigned another project immediately after the completion of a project and therefore I expected to move on too quickly to the next project. Literature does not specifically focus on the time and resources aspect for the BRM process. This factor has emerged as part of this study.

The **lack of standardised processes and consistency** in the application of processes within ABC was identified to be hinderance. Although the organisation is diligent with the first step of the benefit management process, which is to identify the anticipated benefits, management added that once the board gives approval and the project kicks off the departments are left to follow their own preferred project management methodologies and processes. The senior management of ABC confirms that there are different tools used to get to the benefit case and evidently no formalised process to monitor and track benefits anticipated.

This result agrees with the study that revealed that in although in some instances benefits are identified in the business case at the beginning of the project, they are not tracked thought out the project lifecycle (Marnewick & Marnewick, 2022). The senior management team have shared that some departments may have a BRM processes of some sort which may be formalised but certainly not standardised or shared across the departments or functions and no one is expected to follow a BRM process. This finding agrees with literature that often organisations do not have a systematic approach to BRM and do not follow formalised processes which contributes to the benefits not being identified adequately and at times not very clear (Hietala & Päivärinta, 2021), the lack of standardisation impacts the benefit realisation process being implemented at ABC even though there are project management processes implemented.

**The lack of accountability** of benefits or the benefit realisation as well as **no standard processes** followed in the organisation influence one another. Accountability cannot be defined when there are no formal or standard processes. The literature agrees with this finding, the implementation of the BRM process in industry is said to be a challenge because it is difficult to determine what the benefit is or should be as the process involves different stakeholders, using different tools, and is interpreted and perceived differently by the different stakeholders involved (Aubry, et al., 2021), therefore it is crucial to have formalised, and standardised process as far as possible to ensure that the different interpretations are limited or controlled.

The ABC senior management team identified other factors that impact benefit realisation process adoption as, the **people behaviour and no consequence** to not doing the right things, the **lack of Top Management buy-in** in the organisation which they have also linked to the **lack of education** of the BRM process. Although the management can see the challenges and give the factors that in their experience have seemed to affect the adoption of the BRM, they emphasised on the need for BRM education in the organisation is key and perhaps should be the first step especially by beginning with the top management and then to cascade the knowledge down to the lower levels, they argue that this will help to facilitate the buy-in and enforce the correct people behaviour and approach to the BRM. These key insights were found as the result of this study, the literature found in this research does not delve specifically in the top management buy-in as a negative impact to the adoption of the BRM process, however, it is key to note that the project governance is highlighted as one of the key success factors for projects. It highlights that the key stakeholders in the project governance process, who are mainly the top and senior management teams should be able to manage their involvement in decision making and to address their concerns and needs (Derakhshan, et al., 2019). Biesenthal and Wilden (2014) also indicated that the primary focus of project governance is to align the project goals to the organisations strategy to result in benefit realisation. Thus, if there is no support or buy-in from the relevant management teams' benefits realisation would not be possible to manage effectively.

Top Management buy-in and BRM education are also outlined as key factors that will aid the adoption and discussed further in theme 4.

The other factor mentioned is the **stakeholder involvement and communication**, which is linked to the projects benefit identification process. The senior management team reveal that there is a lack of communication from the management from the onset of the project, the objectives of the projects including its benefits are often not communicated clearly and thus, it

becomes difficult to track or measure what is not known especially by those who need to be involved to ensure the benefits are realised. This finding aligns with the literature that stakeholder awareness is critical for project success and ensuring that the deliverables are aligned to the strategic intent of the project (Serra, 2013). The literature also agrees that stakeholder involvement and communication are key, it states that stakeholder awareness, communication and clear benefit targets are key to ensuring improved project performance which influences project success (Zwikael, et al., 2018).

It is evident that setting clear targets and objectives of benefit realisation from the onset and communicating these to those involved is key to an improved project performance which ultimately will lead to the realisation of benefits (Zwikael, et al., 2018). Another challenge highlighted in literature is that the non-measurable benefits identified at the beginning of the project are often dropped which seizes the opportunity to realise the crucial benefits expected from projects (Aubry, et al., 2021), it is evident that if benefits and the expected outcomes are not clearly communicated to the correct people it is easy to drop what one may deem unnecessary or crucial.

Another factor identified was the **lack of trust** that have emerged in some of the areas in the business due to the promises that have not been fulfilled by management on previous projects. The study revealed that the overstated benefits or promises made to the stakeholders and not met leads to the lack of trust in the process and affects the perception of those who need to get involved on projects and benefit realisation. This factor emerged as part of this study and there was not enough information found in literature on the topic of trust and benefits realisation.

#### **4.7.4 Theme 4: Factors that can aid the adoption of BRM**

Another question that was posed to the ABC senior management team was to identify the key factors that they think can assist the organisation in adopting the BRM process. The factors

identified includes the implementation of the BRM process, BRM Education, Stakeholder involvement, Top Management buy-in and Accountability.

The senior management team identified the **standardisation of the BRM process and the BRM education** as the biggest factors that will influence the adoption of the BRM process within ABC. The management suggest that the organisation will benefit from the formalisation and standardisation of the BRM processes across the different departments if the process is done correctly. Literature agrees with this key finding that a systematic approach improves the delivery of project benefits, it further confirms that employees are satisfied through knowing the objectives and benefits connected to their efforts on projects (Hietala & Päivärinta, 2021), this is key to drive the influence on employees towards the adoption of the BRM process. The ABC management suggests that once the BRM processes are put in place, formalised and standardised across departments, there should be an awareness and education series to ensure that the leadership team and the entire organisation is clear on what the BRM process is and what the expectations are, this will ensure top management buy in and ensure the process is sustained they argued.

The sentiment that the **BRM education** will aid the adoption process was shared amongst the ABC senior management team. Most of the participants alluded to the fact that the organisation is not abreast on the BRM process itself and thus, project success is still based on the traditional project management approach and not the modern views. Literature does not have sufficient information in the way that the education of BRM can directly influence the adoption of the BRM however given that with the implementation of any new process there needs to be change management processes such as education and awareness for those involved to enable the adoption process, the consensus is that the education of the BRM concept is key to enable those involved to align on the benefits strategy of the organisation and expectations thereof.

Another key finding in literature that is linked to the need for BRM education in the organisations is that the challenge in practically implementing the BRM process is due to the complexity in ensuring that stakeholders involved in the process of benefit realisation process understands the benefit concept the same way, even though they are from the same organisation, this is due to the fact that the benefit identification process and what needs to be measured is often derived from the different calculations done by different people, interpreted and perceived by different stakeholders and this, influences the decision on defining the project benefits (Aubry, et al., 2021), thus the findings in this study that BRM education is key to ensure everyone who is involved in on the same level of understanding of the process and the expectations is validated.

The third factor that was identified in the study is the **stakeholder involvement**. The findings revealed that to ensure benefit realisation, more stakeholders should be made aware of the process and those that are part of the project should also be a part of the benefit process from the onset through to the end. This factor aligns with the factor identified in theme 3 as a hinderance to the adoption of BRM, the management's sentiments also align with literature, that stakeholder awareness influences the return on investment because it enforces alignment between all stakeholders involved and the expectations set out as critical success factors for the strategic delivery of projects (Serra & Kunc, 2015) thus, ensuring alignment with stakeholders on a continuous basis may enable with the adoption of the BRM.

**Top Management buy-in** was also mentioned as a key factor that is critical to aid the adoption of the BRM process at ABC. The findings reveal that the buy-in from those who have influence will encourage the teams to follow the processes as they see the value in the BRM process. Top Management buy-in and its influence on the BRM process was understudied in the literature, this factor is a key insight that was gained as part of this study.

The study revealed that **accountability** another factor that is necessary for BRM adoption. The ABC senior management added that having clear assigned roles of accountability for BRM will help in managing the process. Although management acknowledged that this is a need in their organisation, the study done by Mamabolo and Marnewick revealed that the accountability of BRM is still not clearly defined as there is no agreement on who must own the benefit management responsibility and accountability (Mamabolo & Marnewick, 2022). This indicates the difficulty in industry with assigning the roles and responsibilities for project benefits, and management of these as the lack of consensus on the roles and responsibilities directly impacts the accountability and ownership.

## **4.8 Conclusion**

The chapter outlined the case study in which the research study was conducted, and the participants position within the ABC organisation. The chapter discussed the findings from the study using the themes found in the data collected and analysed, the direct responses from the participants are used in the chapter to support the results found. The chapter further discusses the findings based on the themes found in the study.

# 5 CHAPTER FIVE: CONCLUSION AND RECOMMENDATIONS

## 5.1 Introduction

This chapter outlines the summary of the findings of this study as presented in chapter 4. It will also present the revisitation of the research objectives, research question, research proposition as well as provide the conclusions and recommendations made from this study.

## 5.2 Research Objectives

The objectives of this research study were:

**Objective 1:** *To understand how the project benefits are aligned to the organisation's strategic goals.*

This objective was addressed through the literature reviewed that has shown the connection between the project management process, benefits management and the organisational strategy. The findings of the study revealed that private organisations do more work upfront before projects are initiating, by identifying benefits and justifying the anticipated benefits alignment to the organisations strategy as this is also a mandatory process for all project initiatives that require funding from the organisations board.

The study also revealed that the organisations tend to use project initiatives to implement the organisations strategic objectives and thus, use the funding approval process to ensure that the initiatives align to the strategy and prioritise the projects according to the alignment to strategy and benefits identified. These findings align with literature which outlines that more and more organisations are starting to shift towards using the project management principles to strengthen their business strategies in the competitive markets and tend to use projects to deliver on the organisation's strategic objectives.

**Objective 2:** *To understand what processes are followed to ensure benefits are realised on projects*

This objective was met through enquiring on the BRM processes or similar techniques that which the organisation follows to ensure benefits are realised. The findings revealed that there is a lack of standardised processes and tools across the organisation, where there are processes, they are not standardised across the organisation and not always consistent.

The study also revealed that the tools used are only to aid in identifying the project benefits, documenting these to obtain funding and not necessarily to monitor or track the benefits throughout the project or sustainability. Therefore, this objective was met.

**Objective 3:** *To review and identify the factors hindering the adoption of BRM process*

This objective was met through the unpacking of the challenges faced by the ABC senior management teams to implementing and adopting the BRM process. The findings from the interviews and the literature reviewed as part of this study confirmed the factors that are hindering the adoption of the BRM process in the organisations.

The key factors identified are as follows:

- 1) The lack of accountability and ownership of the benefits,
- 2) The lack of standardised BRM processes and consistency in the application of project management processes,
- 3) The lack of stakeholder involvement and communication

Although not covered in detail in the literature, the following additional factors identified emerged as part of this study:

- 4) The lack of time and resources allocated to manage the benefit realisation process,
- 5) The people behaviour and no consequences to not doing the right thing
- 6) The lack of BRM knowledge and

- 7) The lack of trust from employees which stems from historical “empty” promises from management.

**Objective 4:** *To review and identify the factors that can assist in the adoption of BRM process*

This objective was met through the inputs of the participants of ABC group and what they deem as a need to assist them in implementing and adopting the BRM process.

The findings from the interviews and the literature reviewed as part of this study confirmed the factors that may assist in the adoption of the BRM process in the organisations.

The participants identified the following factors:

- 1) Formalising and standardisation of the BRM process,
- 2) Stakeholder involvement,
- 3) Clear benefit accountability,
- 4) BRM education,

Only one factor was not covered in detail in the literature reviewed and therefore, emerged as part of this study:

- 5) Top Management buy-in

### **5.3 Research Question**

The research question posed at the beginning of this study is:

*What are the factors hindering the adoption of benefit realisation management within a private organisation to assist in determining whether projects have achieved their strategic goals and can be classified as a success?*

The study confirmed the research question. The themes that emerged during the analysis of the data revealed the factors that hinder the adoption of the BRM process in the private organisation studied. Both accelerators and hinderances were provided by the senior management team and

the findings show that these factors are interrelated as they reveal the key aspects which needs to be considered to assist in establishing or implementing and adoption of the benefit realisation management approach in the private organisation so to aid the projects to deliver on their strategic goals and establish project success.

## **5.4 Research Proposition**

The research proposition was that the:

*The adoption of a Benefits Realisation Management processes aids the organisation's ability to determine project success by explicitly linking the project outputs to strategic benefits and measurable outcomes, and by assigning clear accountability to organisational roles which become responsible for each stage of value creation process.*

The proposition aligns with the literature studied during this study. The literature supports the need to consider benefit realisation management processes to enable the planning, tracking of benefits and ensuring that the necessary changes are made as and when necessary, during projects to ensure benefits are realised. the literature revealed that project success is not only based on the criteria of time, cost and quality but also the customer satisfaction and the value that the project changes bring to the organisation.

The findings in then study also reveal that there is a gap in the implementation of BRM within the organisation studied. Although literature suggests that the BRM process implementation will assist in determining the achievement of project goals based on the findings obtained in this study, it cannot be concluded that the BRM process will assist in meeting the organisations strategic objectives and ultimately influence project success.

## 5.5 Conclusion

Based on the findings of this study, the following conclusions were drawn:

- 1) The projects that obtain funding approval from the ABC board are aligned with the strategic objectives of the organisation as the funding approval is based on the project benefits alignment to the organisation's strategic goals.
- 2) Projects that do not require funding from the ABC board do not always follow the governance process thus; their benefits are not always aligned to the organisation's strategic goals.
- 3) The organisations spend time and effort in identifying project benefits to obtain funding and prove alignment to the organisation's strategy, however, spend less effort in ensuring that the project benefits are, tracked, monitored, realised and sustained.
- 4) At ABC project success is based on the traditional approach "iron tringle" criteria, on time, on budget and scope.
- 5) There are no formal or standardised BRM processes followed at ABC.
- 6) Project benefit accountability and ownership is not established at ABC.
- 7) The comparison of the factors identified as inhibitors and aiders to the adoption of the BRM process suggest that the key factors that influence the BRM adoption are; Accountability and ownership, BRM process standardisation, BRM education, Stakeholder management and communication and the other factors identified are influenced by these factors.

## 5.6 Recommendations

Drawing from the findings of this study the following recommendations are hereby presented:

- 1) Benefit realisation is a process. The top and senior management at ABC should be made aware that documenting project benefits is not enough, the benefits need to be tracked, monitored throughout the project lifecycle and measured for realisation.
- 2) The management need to dedicate resources for the BRM process and ensuring that there is enough time allocated for those responsible for benefit tracking and monitoring to ensure it is implemented correctly.
- 3) BRM education should be facilitated in the organisation to ensure alignment of departments on the concept and enable BRM adoption. This can be done through training courses to ensure that the management teams and the organisation is all on the same level of understanding of the strategic alignment of the project benefits with the project benefits as well as on the processes to ensure benefit realisation and ultimately project success.
- 4) The top management need to buy in and support the BRM process implementation and develop strategies to manage benefits realisation and set accountability.

## 5.7 Areas of future research

For further expansion of this study and considering the limitations of the study, the following recommendations are suggested:

- The study can be expanded to other industries or fields than the retail industry as the BRM concept applies to all projects in all fields.
- The study can be extended to more participants at different levels to gain more insights from a broader audience. This can be within the same organisation or across multiple organisations.
- Investigate the role of programme management in benefits ownership and the integration into operations.
- Detailed research of the distinction between the project and post-project phases and the associated responsibilities for benefit tracking and measurement, especially in relation to industry norms and the role of PMOs.
- Investigate and contrast the case study organisation with others that have successfully adopted BRM.
- Investigation of the role of data systems or performance analytics in enabling BRM
- Investigate the quantification of benefits, the cost/benefit trade-off of BRM systems, and organisational roles.
- Investigate the reason why the issues identified in literature occur and what makes them worse or better in this specific case study.

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# APPENDICES

## Appendix A: Ethics Approval



UNIVERSITY OF CAPE TOWN  
IYUNIVESITHI YASEKAPA - UNIVERSITEIT VAN KAAPSTAD

2023/09/21

EBE/00429/2023

RE: Research Ethics Committee Project Approval Letter

Dear Ntombifuthi Ngobeni,

Your application for ethics review of your project titled

Benefits Management and its value to the organisation: A Case study in a PMO environment with technology driven projects

has been reviewed and evaluated by the  
Engineering & Built Environment Committee.

You may proceed with your research project titled:

Benefits Management and its value to the organisation: A Case study in a PMO environment with technology driven projects

Please note that should:

- (i) any serious or adverse effects to participants occur and/or,
- (ii) aspect(s) of your current project change and/or
- (iii) any unforeseen events that might affect continued ethical acceptability of the project occur then you should immediately report this to the approving REC. You may be required to submit an amendment to this application, in order to determine whether the changed aspects increase the ethical risks of your project.

Based on the information supplied your application has been successful and is approved.

Please note the following additional conditions associated with this approval:

- (i) Approved, in the understanding that interviews are to be conducted, despite the application indicating a questionnaire (survey). The interview questions and status of the interviewees are regarded as low risk, and plans for safe storage of data are noted.

Regards,

Engineering & Built Environment Committee.



## Appendix B: Consent Form



Department of Construction Economics Management  
 CON5023Z: Minor Dissertation in Project Management  
**Consent form for recording of interview**

<b>Title:</b>	<b>Benefits Management and its value to the organisation: A Case study in a PMO environment with technology driven projects</b>
<b>Name of interviewer:</b>	<b>Ntombi Ngobeni</b>

I ....., confirm the following:

1.	I have read the information sheet provided by the researcher and thus understand the projects aims and objectives.	
2.	I am participating in this project voluntarily and understand that I may withdraw from the interview at any time if I so do wish.	
3.	I acknowledge and understand that confidentiality will be maintained.	
4.	I have been asked permission to record this interview and have given my permission.	
5.	I understand that this data is accessible to other researchers only if they honour the confidentiality agreement.	

**Participant**

Date .....  
 Signature of participant .....  
 Name of participant .....

**Researcher:**

Date .....  
 Signature of participant .....

## Appendix C: Interview Questionnaire



Department of Construction Economics Management  
 CON5023Z: Minor Dissertation in Project Management  
**Interview Questionnaire**

<b>Title:</b>	<b>Benefits Management and its value to the organisation: A Case study in a PMO environment with technology driven projects</b>
<b>Name of interviewer:</b>	<b>Ntombi Ngobeni</b>

### Questions:

<b>Question One</b>
1.1 During the project inception phase who identifies and ranks the project benefits? .....
1.2 Are the benefits aligned with the company's strategic objectives .....
<i>1.3 Are projects in your organisation deemed a success if Project Management objectives "iron triangle" are met or if the project benefits have been realised?</i> .....
<b>Question Two</b>
2.1 Benefits requirements management is a technique used by project managers to ensure that objectives and benefits are realised on completion of a project. Does the organisation use this technique or any similar approach? .....

**Question Three**

3.1 What are the factors hindering the adoption of benefits realisation management?

.....

**Question Four**

4.1 What are the factors that can assist in the adoption of benefits realisation management?

.....

## Appendix D: Interview Transcript



Department of Construction Economics Management  
 CON5023Z: Minor Dissertation in Project Management  
**Interview Questionnaire**

<b>Title:</b>	<b>Benefits Management and its value to the organisation: A Case study in a PMO environment with technology driven projects</b>
<b>Name of interviewer:</b>	<b>Ntombi Ngobeni</b>

### Questions:

<b>Question One</b>
1.1 During the project inception phase who identifies and ranks the project benefits?
Business Executives and Heads of Departments normally identify the benefits and the presented to the board for ranking.
.....
1.2 Are the benefits aligned with the company's strategic objectives
<i>Yes, some of the projects are linked to the company strategy but not all. There are some that do not aligned to the company strategy.</i>
.....
1.3 Are projects in your organisation deemed a success if project objectives are met or if the project benefits have been realised?

When the project objectives are met, we link project success when the project is on time, on budget and the scope. No one measures the benefits of the projects post the projects unless it's done outside my knowledge. However, I think success must be linked to the project benefits and the realisation of the benefits.

.....

**Question Two**

2.1 Benefits requirements management is a technique used by project managers to ensure that objectives and benefits are realised on completion of a project. Does the organisation use this technique or any similar approach?

The business has a process, and tools used to identify the benefits and to show them on the benefits case and to be able to get funding however the process of tracking them is not really available.

.....

**Question Three**

3.1 What are the factors hindering the adoption of benefits realisation management?

1. *Ownership of the project benefits is misplaced - It is not with the project delivery team. The benefits owner is not the one who is accountable for the delivery, and this is because of the company structure.*
2. *Accountability - people fear taking ownership of the benefits that may not be realised and making decisions.*

.....

**Question Four**

4.1 What are the factors that can assist in the adoption of benefits realisation management?

1. *Leadership knowledge – leaders need to be more knowledgeable on the benefit realisation management process in order to support it and to be able to hold people accountable.*

2. *Process – there must be a process in place to allow the project delivery team to execute the measurements of benefits and present it back to the board.*

# Appendix E: Data Analysis: Thematic Analysis

Objective	1) Understand how the project benefits are aligned to the organisations strategic goals.	2) Understand what processes are followed to ensure benefits are realised on projects.	3) To review and identify the factors hindering the adoption of benefits realisation management in the private organisation.	4) To review and identify the factors that can assist in the adoption of benefits realisation management in the private organisation.
Questions	1.1 During the project inception phase who identifies and ranks the project benefits?  1.2 Are the benefits aligned with the company's strategic objectives?	1.3 Are projects in your organisation deemed a success if project objectives are met or if the project benefits have been realised?  2.1 Benefits requirements management is a technique used by project managers to ensure that objectives and benefits are realised on completion of a project. Does the organisation use this technique or any similar approach?	3.1 What are the factors hindering the adoption of benefits realisation management?  3.2 What are the factors hindering the adoption of benefits realisation management?	4.1 What are the factors that can assist in the adoption of benefits realisation management?
Number				
Respondent 1	The project Owner - we did a pilot in excel before the project and chose top 5 benefits using research and consultation with industry experts and presented the benefits case to the board for approval and prioritisation.  Yes, they are aligned. The company values are Customer Service, Working Fast and Smart, and Doing the right thing. The project benefits were to enable the schedulers to do it faster and efficiently - which benefited the company on cost as over time was monitored and reduced and paying the right salaries to employees.	When the project objectives are met. It is always depended on the time, cost and quality criteria.  I think the business does use the benefits requirements management as we did journey maps, some studies and several workshops with different audiences to try and ensure the benefits identified are valid.	1. <b>Change Management</b> - Because of the high labour Turnover, training is constantly required, and this is often underestimated at the beginning of the project, plus with this added the costs go up. 2. <b>People behaviour</b> - Human behaviour, people are sometimes stuck in the old ways of doing things and sometimes they take time to adapt to the systems changes implemented and it takes much longer to realise some of the benefits. 3. <b>Little to no consequence</b> - sometimes it takes longer to realise benefits if there's little to no consequence to doing the	1. <b>Reinforcement and Training</b> - more training and giving more context to the users can assist in speeding up the process to realise benefits. 2. <b>People involvement</b> - involving the people that are directly impacted by the changes earlier in the project and throughout the journey of the project. Involving them in selecting the solution, scoring proposals and understanding what the benefits is. 3. <b>Buy in and support from Top Management</b> - top management support is critical as they can guide the teams with adaptation when they understand the strategic intent of the benefits to the organisation. It also helps to remove barriers along the way of implementing the project.
Respondent 2	Business Owner and product owners and supported by the CTO in the IT department. Then presented to the board for approval and ranking.  Yes, they are aligned but not all of them. Project prioritisation is based on alignment with the strategies though some aren't they still get executed but maybe done later or prioritised for risk mitigation.	It should be both. However, currently we do either one, some projects are deemed a success at the project completion phase and some are evaluated against the benefits case presented to the board.  No, we don't use the BRM technique, the process is broken. We currently don't use the PMA but the responsibility is often left with the PM's - Project governance lead and Strategy office to drive and measure the benefits, and they are not doing anything about it.	1. <b>Lack of BRM Process</b> - I think the process is broken and we need to rethink at the BRM techniques or processes to implement it correctly. 2. <b>Accountability Misplaced</b> - the accountability is not with the business owners or product owner and thus nobody is accountable to manage the process.	1. <b>Developing the BRM Process for the organisation</b> - re look at the BRM process for the organisation, map the entire process and define clear roles and responsibilities. 2. <b>Educate the business</b> - there may be a need to educate the organisation on BRM, ensure that there are sufficiently defined project objectives, benefits and group strategic alignment to justify spend. 3. <b>Leadership Buy In including Financial Managers</b> - leadership and finance buy in is crucial. Finance needs to be involved more in managing and measuring the benefits.
Respondent 3	The board evaluates the benefits identified by the Project sponsor Project or product owner, project manager  Yes, our projects are aligned with the BOLT's strategy.	It depends, but for me it is the adoption of the systems and utilisation. With every project comes a change in process and if the stakeholders have not adapted to the change this becomes a risk of failure of implementation.  Yes, we are required to have record of the specific benefits acquired from the project and presented to the board. BRM gives you a clear understanding of the why of the project, and impact of the project. Having it from the start also allows you to align the business strategy to align to the benefits to be realised.	1. <b>Lack of communication</b> - not communicating the benefits correctly. 2. <b>History</b> - past experiences of being let down or empty promises. 3. <b>Unclear accountability</b> - if project manager is not clear on accountability or in full control of the project. Accountability lies in every stream and if PM is not in full control of every stream they will have an impact on the project overall realisation of benefits. 4. <b>Accountability</b> - how to hold someone accountable to the future benefits? 5. <b>Effort</b> - it needs to be a focused activity to ensure benefits are tracked. A dedicated team with accountability.	1. <b>Transparency</b> - be open to the stakeholders on the benefits and clear communication of the right message to the right people on the benefits. 2. <b>Creating desire</b> - tell people how the system or project will help the individual at a time and not only the benefit to the organisation. 3. <b>Involve the employees in the project</b> - make them understand the project and make them feel like they are part of the decision-making process. 4. <b>Polishing the solution and monitoring the actual results before the official project kick off.</b> 5. <b>Ongoing process from project inception</b> - Monitoring the benefits and savings during the project and not waiting till the end of the project
Respondent 4	In an ideal world, all role players involved should be part of the benefits identification, including the users, the technology support teams, sponsors and owners.  Yes, however not always successful. The mandate at the beginning of the project is always to align to the business strategy however I think we don't always spend enough time at during planning to get all the requirements and the right people on the project.	I think we walk away from projects too soon and not only measure at the point when the project objectives, on time, on budget and delivery of the product are met and not necessarily when the benefits are realised.  We do to some extent, we only track the immediate benefits such as the on-time delivery, on budget and not necessarily the experience of the end user or the long-term benefits therefore, we don't measure fully the entire benefit of the project.	1. <b>Tight deadlines</b> - there is always a sense of urgency in delivering projects and less time is spent on the planning and getting all requirements and benefits. 2. <b>Not involving all stakeholders</b> - not involving all stakeholders and understanding how their goals are linked to the business strategy. The business strategy is always long term but the operational strategies and the gap is often overlooked as the priorities of the different stakeholders then differ at the point in time. 3. <b>Inconsistency in measuring the benefits</b> - what we measure as benefits and when we measure. 4. <b>True cost of the contribution</b> - We don't actually measure the true cost of the resources on the project and thus not actually going to measure the true benefits on the project.	1. The benefit case should document the intangible and tangible benefits to enable tracking. 2. All the stakeholders need to be clear on how to measure the benefits and tracked. 3. Need to train the users and provide ongoing product support at the end of the project.
Respondent 5	Typically, it starts with whoever positions the business case for funding or go ahead. They identify the benefits. The ranking is then between the sponsor, steersman, they then rank or re-rank them to highlight the immediate and tangible benefits.  Yes, for big projects that require significant funding they are because they have to be presented for funding and often have a business case that is aligned to the company strategy for the board and finance committee and prioritise the projects that are aligned to the strategy.	Officially it's when the project benefits are realised, however I think we tend to fall into an early success and stop there when the project is implemented successfully, on time, in budget, with the right quality and when things are working.  There was a process that the IT department implemented. This process was a minimum standard for the standard business case document which included BRM and a template guidance on qualitative and quantitative examples. They then pushed the process governance, but I don't think it is followed diligently. The process being followed is always left to the individual and not always followed or deeply interpreted.	1. <b>Time</b> - Sponsors have day jobs and often no time to spend on looking back on the project benefits post the project delivery. 2. <b>People change jobs</b> - accountability of long-term benefits is not tracked or measured. 3. <b>Not clear benefit upfront</b> - benefits are not always clear upfront, and some are not achievable as they are not interrogated upfront. 4. <b>Accountability</b> - how to hold someone accountable to the future benefits? 5. <b>Effort</b> - it needs to be a focused activity to ensure benefits are tracked. A dedicated team with accountability.	1. <b>Deep interrogation of the benefits identified in the business case</b> - ensuring the benefits are not overly optimistic and are measurable before the project even starts. 2. <b>Building in meaningful pit stops</b> when the project is completed to be able to track and monitor the benefits, keep the project open till benefits are tracked. 3. <b>Place accountability</b> - have people accountable for realising benefits and also have consequences in place for not realising the benefits. 4. <b>Have a data driven culture</b> - collect the correct data to be able to measure the correct metrics.
Respondent 6	Project sponsors, head of departments or executives managers  Yes, I think 25 percent of the project benefits are aligned to the strategy but not all. The rest are not although they should be aligned to the strategy.	When its met its objectives, completed on time and on budget.  We do in some departments, we have different approaches on different departments and are also working on implementing the Lean Portfolio Management process in the IT department. I think there is tracking in strategy but not all. There is a certain great tracking, indirect tracking but there is still a big portion with no tracking at all.	1. <b>BRM is based on the people who decide what to measure.</b> Alignment of people who determine strategy and vision and then to understand what that is. The responsible persons then can implement the correct thing. 2. <b>Lack of accountability</b> - people do not like to be kept accountable. Big corporates lack the culture of taking accountability.	1. <b>Understanding the concept of benefits realisation.</b> Most people who understand the success metrics or BRM usually understand the strategic objectives. 2. <b>Incentivise people correctly</b> - Charlie Munger's quote - "Show me the incentive and I will show you the outcome" - incentives are the catalyst for driving the behaviour and actions of work". You need to align the incentive programs to be based on the benefits to be realised based on the vision then everything will be measured and tracked against that. 3. <b>Have a data driven culture</b> - collect the correct data to be able to measure the correct metrics.
Respondent 7	It's a combination of the business that initiates it based on the business need. It would be a combination of the Project Manager and Project Sponsor and the SME. The PM would then present it to the project board and for approval.  We try to align as far as possible. We do great in communicating the business strategy. So because of the awareness of the strategy, there is a sense check in the departments of the alignment of the projects that get initiated in the departments and those which do not align are often flagged.	When the project objectives are met. When doing the business case there a lot of focus on the project objectives and that would be label as the business success criteria however the realisation of the benefits is not really tracked or measured at project completion.  There is a process and may not be labelled as the BRM process. There is an understanding of ensuring the project objectives are met and probably not necessary the project benefits.	1. <b>No awareness of the importance of the BRM and the concept of BRM in the business</b> - not all the factors of the organisation from shifting from tracking project objectives and start focusing on the actual project benefits. 2. <b>No buy in</b> - The interest and buy in of BRM from the sponsors and executive are important.	1. <b>Change Management</b> - buy in from the business executives is important to support the BRM initiative. 2. <b>Educate</b> - Educating the business, stakeholders and people of influence on the concept of BRM and the benefits of it.
Respondent 8	Business owner, CTO, Heads of the departments or benefits owner normally identify the benefits and ranks the benefits collectively.  Ideally it should be aligned, with each investment objectives are always linked to the company strategic objectives although not all project and benefits align or meet the objectives of the organisation. There are some of the initiatives that happens outside of governance.	Mostly a project is deemed a success when the project objectives are met and signed off as completed because the benefits can take up to 6 or 10 years to be realised and you cannot put the project on hold till then. In some projects some projects the benefits are identified and the are some short-term benefits which are realised during the projects, and these are identified and tracked with the project however the measure and tracking usually stops at project sign off.  There is a process, but I don't think it's being followed. The benefits are tracked informally using a tracking tool, but it is done outside of the governance process.	1. <b>Time</b> - its time consuming to track benefits because you need the right data and need to monitor it over time and that needs resource and effort, and people often say they don't have the time to track benefits. 2. <b>Accountability and accepting the ownership</b> - people are scared to take accountability and the ownership of the benefits as they think may affect their job security if not met. 3. <b>Management Buy in</b> - people that are not used to it are often not interested and see the tracking as an additional workload.	1. <b>Education</b> - We need to raise more awareness around the Benefit Realisation and its importance. We need to change the mind set of people around the accountability of the benefits. 2. <b>Process</b> - Putting a process in place to report back on the benefits and progress and taking accountability of the process made. 3. <b>Socialising the process</b> - open the benefits process to a larger audience and stakeholders, including more people in the process upfront who will then support the process.
Respondent 9	Typically, it's the project initiator or requestor who normally are the Heads of business, or business Executive managers that identifies the benefits, and the prioritisation will be decided at the board level.  With the bigger initiatives. Yes, Either a certain pillar or a goal in the strategy. We work with the projects that are mostly strategy driven and support the initiatives.	When the project objectives are met the project is completed and signed off. The benefits are more long term and we never get there especially with the big projects.  I think its different for the various teams. For my department its about being able to show the benefits and values before we get the project started. The project value is defined in advanced and that's how projects are prioritised.	1. <b>Time</b> - the main challenge is that when one project is completed, we move on to the next project and never go back to the previous project. 2. <b>Set up the benefit measuring process</b> - the benefit measurement is not easy if the benefits are not defined upfront and set as the measure upfront. Set it up as a prerequisite before the project starts. 3. <b>Benefit knowledge</b> - The actual benefit itself needs to be set based on research and not an assumption of what the benefits would be.	1. <b>Define the process of benefits</b> - Project brief to the stakeholders, clearly defined scope and out of scope. 2. <b>Show how the benefits or goals came about so that it is realistic to achieve it.</b> Show what the benefits are and how they can be attained.
Respondent 10	Business Executives and Heads of Departments normally identify the benefits and the presented to the board for ranking.  Yes, some of the projects are linked to the company strategy but not all. There are some that are not aligned to the company strategy.	When the project objectives are met, we link project success when the project is on time, on budget and the quality of the solution. No one measures the benefits of the projects post the projects unless it's done outside my knowledge. However, I think success must be linked to the project benefits and the realisation of the benefits.  The business has a process, and tools used to identify the benefits and to show them on the benefits case and to be able to get funding however the process of tracking them is not really available.	1. <b>Ownership of the project benefits is misplaced</b> - It is not with the project delivery team. The benefits owner is not the person who is accountable for the delivery, and this is because of the company structure. 2. <b>Accountability</b> - people fear taking ownership of the benefits that may not be realised and making decisions.	1. <b>Leadership knowledge</b> - leaders need to be more knowledgeable on the benefit realisation management process in order to support it and to be able to hold people accountable. 2. <b>Process</b> - there must be a process in place to allow the project delivery team to ensure the measurements of benefits and present it back to the board
Respondent 11				
Respondent 12				