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**Benefits Realisation Plan Template**

This template contains instructional text to advise how to populate the various sections. Please remove the green text when you have completed the document, prior to circulating.

**Benefits Realisation Plan**

**<Project Name>**

**Date**

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| **Project Name:** |  | | |
| **Date:** |  | **Version:** | Draft/Final |
| **Author:** |  | | |
| **Owner:** |  | | |

**Revision History**

**Date of next revision:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Revision Date** | **Previous Revision Date** | **Summary of Changes** | **Changes Marked** |
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**Approvals**

This document requires the following approvals. A signed copy should be placed in the project files.

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**Overview**

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| **Purpose** | A Benefits Realisation Plan is used to define how and when a measurement of the achievement of the project’s benefits can be made. |
| **Contents** | Benefit Matrix 3  The Project’s Output 3  Resourcing 4 |
|  | *The following quality criteria should be observed:*   * *Covers all the benefits in the Business Case* * *The benefits are measurable and baseline measures have been recorded* * *Describes suitable timing for measurement of the benefits, together with reasons for the timing* * *Identifies the skills or individuals who will be needed to carry out the measurements* * *The effort and cost to undertake the benefits reviews is realistic when compared with the value of the anticipated benefits* * *Consideration is given to whether dis-benefits should be measured and reviewed.* |

### Benefit Matrix

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Ref no.** | **Benefit Description** | **Owner[[1]](#footnote-1)** | **Measurement[[2]](#footnote-2)** | | **Resources[[3]](#footnote-3)** | **Baseline[[4]](#footnote-4)** |
|  |  |  | **How** | **When** |  |  |
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### The Project’s Output

In addition to the individual benefits of the project, provide some notes on how the performance of the overall Project’s output will be reviewed.

### Resourcing

Included against each benefit in the matrix but it may be helpful to provide some overall comments or requirements here.

1. The Owner is the person who is accountable for the expected benefits [↑](#footnote-ref-1)
2. Describe how to measure achievement of expected benefits, and when they can be measured [↑](#footnote-ref-2)
3. What resources are needed to carry our the review work [↑](#footnote-ref-3)
4. Baseline measures from which the improvements will be calculated [↑](#footnote-ref-4)