TEMPLATE 26 · TRANSFORMATION

Benefits Realisation Tracker

Map how the programme creates value, give every benefit an owner, a measure and a date, and track it until it's real.

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Projects deliver outputs. Benefits only arrive when people start working differently, and someone in the business has to own that.

> *If no one in the business owns a benefit, it's a hope, not a benefit.*

HOW TO USE IT

01 **Map** the chain from what you deliver to the objectives it serves (page 2).

02 **Profile** each benefit: owner, measure, baseline, target and date (page 3).

03 **Track** actuals every quarter against the target, not against the plan.

04 **Sustain** by handing measures to business-as-usual reporting before the programme closes.

FIVE TYPES OF BENEFIT

01 Cash-releasing
Costs that leave the budget: fewer contractors, lower licence spend.

02 Revenue
More sales, better retention, higher prices or new income.

03 Efficiency
Time or capacity freed up but not removed from the budget.

04 Risk & compliance
Lower exposure, fewer incidents, regulatory obligations met.

05 Strategic
Capabilities or positions that enable future value. Measure with a proxy.

A GOOD BENEFIT PASSES FIVE TESTS

01 **Owned** by a named business leader, not the programme.

02 **Measurable,** with a defined calculation and data source.

03 **Baselined** before the change starts.

04 **Attributable** to this change, not to the market.

05 **Dated,** with a realistic ramp-up, not a cliff edge.

A WORKED EXAMPLE

Lower cost to process an invoice

- **Type:** cash-releasing
- **Owner:** Finance operations director
- **Measure:** total AP team cost ÷ invoices processed, monthly
- **Baseline:** £6.40 per invoice (FY25 average)
- **Target:** £3.20 by Q4 FY27, ramping from Q2
- **Enabler:** e-invoicing and automated matching
- **Business change:** teams handle exceptions only

Watch for double counting. If two programmes claim the same saving, the finance team will count it once. Agree attribution early.

The Excel version calculates % realised and status from your quarterly actuals, and summarises benefits by type.

Benefits map

PROGRAMME

DATE

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ENABLERS	BUSINESS CHANGES	BENEFITS	OBJECTIVES
What the programme delivers	What people do differently	The measurable improvement	The strategic goals they serve

Read right to left to test the logic: for each objective, which benefits prove it, which behaviour changes cause them, and what has to be delivered first? Draw lines between boxes that depend on each other.

Benefit profiles and tracking

Type: cash · revenue · efficiency · risk · strategic. Status: on track · at risk · off track · realised

#	BENEFIT	TYPE	OWNER	MEASURE	BASELINE	TARGET	BY	Q1	Q2	Q3	Q4	% REAL.	STATUS
01													
02													
03													
04													
05													
06													
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