**Program or project name**

Benefits Realisation Reporting

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| --- | --- |
| Author: | Role: |
| Phone: | Email: |
| Date: | |

**Document Information**

**Document Location**

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**Version History**

|  |  |  |  |
| --- | --- | --- | --- |
| **Author** | **Version** | **Version Creation Date** | **Summary of Changes** |
|  |  |  |  |
|  |  |  |  |

Date of next version (if known): TBC

**Approvals**

This document requires the following approvals.

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| --- | --- | --- | --- |
| **Name** | **Title/Role** | **Signature** | **Date** |
|  | Program Sponsor/Senior Responsible Owner |  |  |

Note that signed documents should be scanned and filed in the network filing system.

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**Benefits Realisation Reporting**

Please delete ‘RED’ instructions when completing the report template. Use the information in the Benefits Profile that was developed earlier to assist in completing this report template.

**Benefits Baseline Measures and Forecast**

|  |  |
| --- | --- |
| Project ID or name: Initiative or Program or Project | Benefit ID: Unique identifier |
| Benefit name: Brief sentence on the measureable improvement | |
| Benefit description: Could include the benefit rationale or  business problem the project is addressing | |
| Benefit type: Financial or non-financial, | |
| Benefit classification:  Increased revenue, cost avoidance, reduced cost, improved performance, digital enablement | |
| Objective/organisational goal: List initiative, program or project objectives, or strategic objectives this initiative is aligned to achieve | |
| Benefit dependencies: List any dependencies with the realisation of the benefits | |
| Benefit assumptions: List the assumptions, associated with the realisation of the benefits | |
| Risks/issues: Tracking risks and issues will help better estimate the degree a benefit will be realised | |
| Benefit owner: Accountable Executive, the person responsible for the realisation of the benefit | |

|  |  |
| --- | --- |
| Measurement description: Number of XYZ | |
| Start date: DD/MM/20YY | End date: DD/MM/20YY |
| Owner: Name of responsible manager | Review frequency: i.e. Annually |
| Baseline value: n1 | Target value: n2 |
| Data source: Where will the data come from? | If there are multiple measures (KPIs attached to the |
| Unit: | Number, time, percentage? |
| Method | Detailed benefit calculation method |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| KPI Measure | BRAG Status | Status Commentary | Realisation | 25%  ◔ | 50%  ◑ | 75%  ◕ | 100%  ● |
| KPI1 |  |  | Target % |  |  |  |  |
| Actual % realised |  |  |  |  |
| KPI2 |  |  | Target % |  |  |  |  |
| Actual % realised |  |  |  |  |
| KPI3 |  |  | Target % |  |  |  |  |
| Actual % realised |  |  |  |  |

Each benefit may have multiple measures attached to it. Where there are multiple key performance indicators (KPIs) complete a line for each.

|  |  |  |
| --- | --- | --- |
|  | **Description** | **Action summary** |
| Risks |  |  |
| Issues |  |  |
| Lessons Learned |  |  |