**Program or project name**

Benefits Realisation Reporting

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

**Document Information**

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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  |   |   |

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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 |  |  |