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Project Benefits Realization- Academics' Aspiration or Practitioners' Nightmare

Munir Ahmad Saeed, Candidate for Doctorate of Project Management, UNSW, Canberra.
munir.saeed@student.adfa.edu.au Corresponding Author.

Dr Alireza Abbasi, Director of Postgraduate Studies and Senior Lecturer, UNSW Canberra.
a.abbasi@unsw.edu.au

Dr Tahmina Rashid, Associate Professor, University of Canberra.
Tahmina.Rashid@canberra.edu.au

Abstract

Project Management (PM) literature increasingly calls for making project outcomes (benefits) rather than outputs as criteria for project success. Therefore, PM literature proposes a number of frameworks and measures for effective benefits realization (BR). There is not substantial evidence, particularly in the public sector organizations, as to how benefits are identified, what frameworks are being applied, what role governance plays in effective benefits realization and what are the factors that inhibit and or drive benefits realization? This study aims to address these issues through a qualitative research, based on case study method and uses semi-structured interviews. Our findings show that there is widespread awareness about the significance of BR in the public sector and BR frameworks do exist but rarely used. This research also finds that Project governance does not play effective role in promoting BR. This research highlights the lack of adequate funding, human resources and skills that are haemorrhaging efforts for the implementation of BR. This research also points out that the top management is neither fully committed to the cause of BR nor ready to provide resources and leadership for the implementation of benefits realization in the public sector organizations.

Keywords: Benefits Management, Benefits Realization, Governance, PMO, Benefits Owner, Framework.

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Introduction:

Project success has frequently been discussed over the decades in the PM literature and achieving project success has been the holy grail of project practitioners and researchers. According to Snyder (1987) modern PM emerged as a discipline during the 1950s and Ballard et al (2014) state that project success as an area of academic interest appeared in the 1980s. During the 80s, PM research started investigating project success beyond scope, cost and time, leading this debate Pinto and Slevin (1988) published a list of 10 project success factors, which is now considered a pioneering work on project success (Ballard 2014). Since the last decade and a half, the project success debate has moved from project outputs and has been focussing on project outcomes leading to project benefits management and realization. Bradley (2010) is credited to have introduced the concept of benefits management initially and later he rebranded it as benefits realization. Project Benefits Realization (BR) has assumed significance as a key success criterion in addition to delivery of projects within scope and on time and cost. Project Management literature is increasingly demanding for focusing on project outcomes rather than project output. A number of frameworks have been suggested to incorporate BR into project management processes. Some academics have also suggested to add a fifth phase to the existing project life cycle so that expected project benefits can be realized. This research explores projects in practice with a particular focus on BR and enriches the PM literature, which is currently normative and aspirational, with industry best practices. This study highlights how benefits are identified and aligned to the organizational strategic objectives; are there any BR specific frameworks being used; does project governance play its due role for BR, and finally what are the challenges being faced by the project practitioners in their pursuit for BR.

Literature Review:

Breese (2012) asserts that BR management, as an aspect of project management, has lately received growing attention and literature on BR has been growing rapidly. Association for Project Managers (APM) sets up a Special Interest Group (SIG) in 2009, which has been instrumental in developing survey reports among the members on the significance of benefits management in organizations of their employment. APM issued a survey report for the year 2017, according to which members have reported that there is a growing awareness in organizations that benefits management must be an integral part of project management particularly P3M (APM 2017). Breese (2012) states that despite benefits xxx started to evaluate investments in IT but BR is equally relevant to other disciplines and professions. Breese raises the question, whether BR can radically change management practices and become a panacea for achieving strategic goals. Breese (2012) highlights that there is a need to develop theories on BR based on in-depth analysis of practice.

The research results by Marnewick (2016) indicate that major processes of benefits management are followed by organizations irrespective of the type of organizations and the size of projects in South Africa and Holland. The author states that benefits gained from investment in IT projects, are not linked back to organizational strategies and it does not provide insight into organizations, whether the promised benefits have been achieved, therefore, there can be no certain answer whether the strategic intent has been successfully achieved as a result of investment. Elaborating further, Marnewick concludes that organizational culture does not play any role how benefits management is practiced in the understudy organizations, however, the adherence to benefits management practices depends on organizational maturity. He identified that organizations do not follow benefits management best practices, which subsequently impacts on how the benefits of the investment on

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Information Systems projects are realized. The organizations were found aware of the importance of business case and its role in benefits management; however, the research discovered a missing link between the delivered benefits and linking it back to the organizational strategies. A similar challenge has been highlighted by Chih and Zwikael (2015) that organization do not have the ability to formulate benefits and also do not have processes in place to link the delivered benefits to the promised benefits. In order to fix such problems, Marnewick (2016) suggests a closed loop system which connects the benefits promised in the business case with delivered benefits and also linking back to the strategic intent. The author asserts that despite organizations are conscious of the fact that the delivery of the promised benefits is a measure of success, but such organizations do not put in place the processes to ensure that benefits have been delivered. Benefits management literature offers varying at times contradicting pictures on the employment of benefits realization in practice. He dispels the common impression found in prevalent project management standards and methodologies that put benefits management in the domain of program management. However, Marnewick (2016) states that his research indicates that organizations do attach benefits to individual projects irrespective of project cost and scope. He proposes that benefits management should be a part of project management as another knowledge area and traditional project management lifecycle be expanded to include benefits delivery and realization. Marnewick (2016) in fact echoes the suggestion by Zwikael and Smyrk (2012) in which they have proposed to extend traditional project management cycle to project benefits realization and suggested that the focus of project management should be shifted from project outputs to project outcomes. Marnewick (2016) also suggest that the focus of project governance should be extended from project delivery to ensuring benefits realization, which also highlights the call for the inclusion of benefits realization in project management body of knowledge.

Badewi (2016) states that current research defines project benefits management as ‘the initiating, planning, organization, executing, controlling, transitioning and supporting change in the organization. He argues that his research nullifies the belief that completing project on time and cost does not necessarily lead to stakeholders’ satisfaction and delivering expected project benefits. He states that this research highlights a strong relationship between project management efficiency through project outputs delivery on time and cost with the desired project benefits realization. Badewi (2016) states that project management practices have a significant impact on project success and similarly there is co-relation between project management and benefits management. Therefore, he claims that the combining project management (PM) with benefits management (BM) in a single governance framework enhances the possibility of success. PM combined with BM ensures project success significantly as benefits owners are supported by reliable projects outs delivery, as compared to having [standalone] good outputs or good BM practices only.

Mossalman, and Arafa (2015) argue that BR has become a significant factor for projects and it is common that project success is assessed on the basis of project benefits rather than project completion on time and cost. The survey conducted by Mossalman, and Arafa (2015) shows that there is a significant dearth of benefits management at the project level than at the program level. They suggest a strong governance infrastructure in order to effectively implement benefit management.

There is no consensus yet, whether effective benefits management can be implemented at project, program or portfolio level. Eduardo et al (2015) argue that benefits are usually achieved through program and project management techniques. Therefore, programs and projects play a key role in the execution of business strategy and subsequently delivering value to the business. Therefore, effective management of projects helps deliver project outputs, outcome and enables benefits

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realization. They argue that effective benefits realization practices strongly contribute towards effective implementation of business strategy. In addition, BR practices also positively impact on project management performance. They claim their research findings suggest, in order to enhance the ability to define and manage success criteria, benefits realization strategy should be integrated into corporate governance processes. Referring to various sources, they argue that effective benefits realization management helps highlighting the value and the strategic relevance of projects which results in effective project governance but also enables the organization to deliver planned benefits through strategic governance.

Chih and Zwikael (2015) suggest that project target benefits must align to organizational goals. These benefits must be measurable and realistic, and should be time specific as well as target value. The authors offer a framework based on six propositions: 1) project target benefits can be appraised on the basis whether these fit in organizational strategic goals; 2) the employment of a formal benefit formulation process can improve project target benefits; 3) a highly motivated managers will contribute towards improved target benefits; 4) the presence of strong senior executive leadership can contribute towards improved target benefits; 5) the strong executive support in the form of resources allocation; and 6) the prevailing innovative climate provides enabling environment for all the other five constructs.

Chih and Zwikael (2015) state that in project management, very little research is available to inform how target benefits should be formulated and appraised. The available literature is too broad in scope and does not provide much guidance on benefits management formulation. They also state that PRINCE 2 managing successful projects approach, outlines four steps in project benefits management such as 1) identify the benefits, 2) select objective measures that reliably prove benefits, 3) collect baseline measures and 4) deciding how, when, by whom benefits measures will be collected, however, the authors argue that managing successful projects approach provides a high level guidance and it does not lead as to how these four steps should be implemented with what effectiveness. Chih and Zwikael (2015) propose conceptual framework for target benefit formulation and propositions. This framework comprises, strategic fit, target value, measurability, realism, target date, accountability and comprehensiveness.

Coombs (2015) study involves the exploration of inhibitors and facilitators in an IT enabled organization for Information System implementation. Coombs identifies two main types of inhibitors/facilitators of project benefits realization which are technical and organizational oriented. Technical inhibitors include matters such as poor design of reports and low system response in function response time, whereas organizational inhibitors include staff not showing engagement with new ways of doing things. Similarly, technical facilitators are training on the use of system and organizational facilitators include mapping and redesign on existing processes.

Zwikael and Smyrk (2015) assert that though project management literature is still preoccupied with the delivery of project outputs on time, cost and within specifications, however, lately, they see a movement towards project outcomes, but they claim that project governance has not evolved to accommodate this change. Zwikael and Smyrk perceive the challenges of project benefits realization as accountability and governance issue. They assign key role to project funder and project owner for project benefits realization. The authors offer a governance model for project benefit realization, which echoes the findings of Zwikael and Smyrk (2012), in which the authors give special responsibilities to project funder and owners in project benefits realization management. The authors are confident that the assignment of roles and accountability of project BR to project owner will enhance project performance.

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The above brief literature review highlights that the existing PM literature on BR is normative and aspirational and lacks evidence on benefits management and realization practices in the public sector in Australia. Therefore, to bridge this gap in the existing literature, this research incorporates the project practitioner's perspective and BR practice into the academic knowledge domain and bridges the gap between theory and practice.

Methodology:

The methodology for this research is qualitative and is based on a case study method. A case study method has been selected due to the inherent ability to answer, 'how and why' questions (Yin 2009, 2014). The case study method is appropriate to explore a phenomenon, which is current, observable, allows interviewing and does not require control over the behavioural phenomenon, as well as, focuses on contemporary events. Punch (1998) argues that case study endeavours to understand a case in depth, Blomquist et al (2010) argues for research based on 'project as practice' to discover solutions for project managers and managers. This approach will enhance our understanding of the challenges faced by organizations. There is a dire need to understand how the practitioners actually employ various tools and find out how managers react to unseen and unexpected changes in circumstances. The art and skills of project manager can be explained by practice-based approach that captures and conceptualises the real issues. Therefore, this research employed case study method in order to investigate benefits realization in the public sector organizations, which would respond to a call by Blomquist et al (2010) for project as practice, to identify benefits realization practices.

For this research field data was collected through 30 interviews, conducted in six Commonwealth Government departments; this paper is based on the initial findings and presents the emerging themes and trends on benefits realization in the public sector in Australia. The transcripts of these interviews were analysed to identify emerging themes. As this is a work in progress, the initial themes are based on the research questions, though it is expected that more themes would emerge at the final analysis stage. However, this paper only presents the initial findings as the in-depth analysis is still in progress.

Research Objective:

This research aims to investigate the role of benefits realization as a measure of success in the public sector projects and develop tools for effective benefits management.

Research Questions:

1. How project benefits realization is actually being practiced in organizations?
2. What are the current frameworks, processes and practices employed?
3. How project target benefits are formulated and appraised in practice?
4. What is the role of governance in project benefits realization?
5. What are the enablers and inhibitors of benefits realization in organizations?

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These research objective and subsequent research questions were developed in the light of literature review conducted for this research. As has been mentioned previously that benefits realization literature is normative and aspirational. Therefore, this research was conducted to investigate how far the debates in the PM literature on benefits realization are current and relevant to industry practices.

Results:

Interview questions were based on the above listed research questions and a number of themes were identified from interviews transcripts. The following figure 1- shows the initial findings of this research, which is based on the emerging themes from the participants' interviews in a number of public sector organization of Australian Commonwealth. Figure 1- is based on the inputs from 20 semi-structured interviews of the participants. This figure shows in blue bars, where informants highlighted the existing themes.

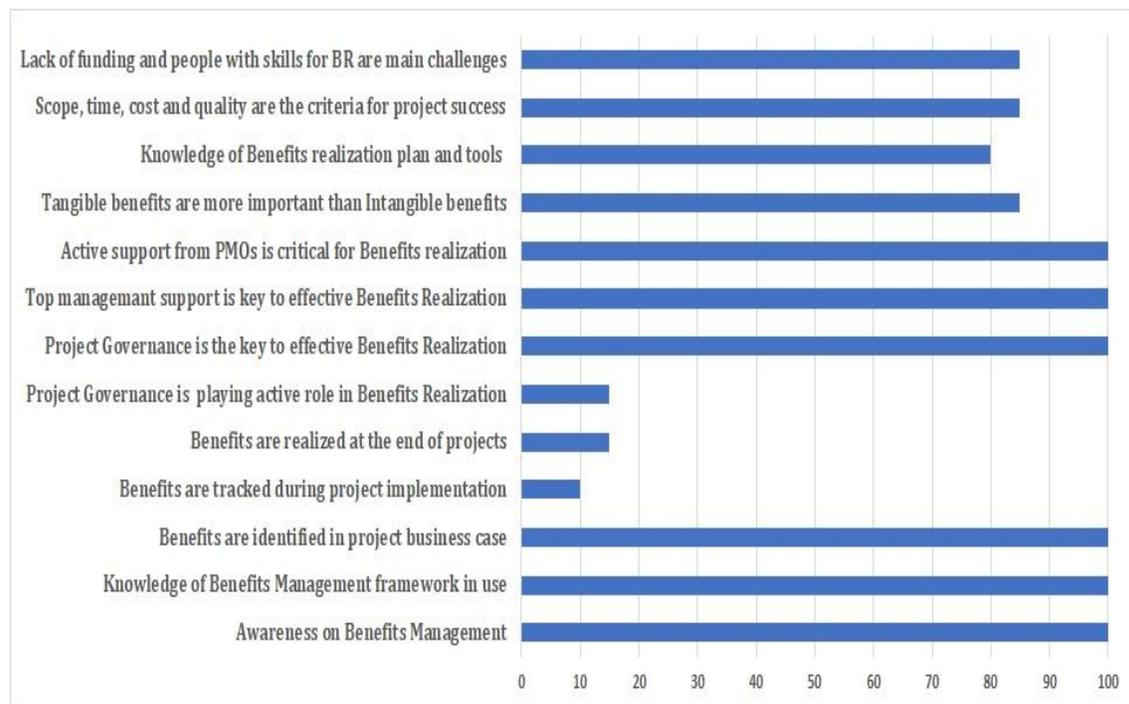


Figure 1- Initial emerging themes of BR practices

Discussion and Analysis:

What practitioners know about Benefits Management:

According to APM (2017) Special Interest Group (SIG) survey the members have reported that there is a growing awareness in organizations that benefits management must be an integral part of project management particularly P3M. The analysis of the initial findings of this research highlights that there is a widespread awareness on the significance of benefits management (BM) and benefits realization (BR) in the case study public sector organizations. All the interview participants in their discussions with the researchers exhibited their knowledge of the BM concepts and informed that in

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the initiation documents of all projects potential benefits are listed in the business cases. They informed that identifying promised benefits of all projects is a common requirement for the approval of a project concept and the business case. Most of the participants also acknowledged that they are aware of BM tools such as benefits profile, benefits mapping, BR plan and benefit owner. Majority of the interviewees informed they are not aware of anything such as benefits realization strategy.

BM Frameworks in practice:

Various researchers have proposed a number of frameworks for BM suggesting that these frameworks be implemented in conjunction with the existing PM methodologies (Zwikael and Smyrk 2012, Chih and Zwikael 2015). In the studied organizations for this research, benefits are managed through PM methodologies, specific BM frameworks and at times under risk and quality management frameworks. In some organizations benefits management frameworks have been made available but the use varies from program to program. The use of BM frameworks also depends on the discretion of project and program managers, as some project managers take BM more seriously than others. In one of the case study organizations, which has undergone organizational changes resulting from the mergers of various Commonwealth agencies, has about eight Project Management Offices (PMOs) running in parallel. Therefore, in this organization the application of BM and BR is at various levels and is moving slowly towards maturity, as one participant said, “we have our own [BM] framework, we have our own processes and methodology, but it is bit of journey at the moment”. In order to integrate all the existing PMOs, the case study organization is in the process of developing an Enterprise PMO (EPMO), which is expected to provide more integrated approach towards project management and BM. Explaining the progress towards an EPMO, the same participant said, “We have matured a tremendous amount but we are not quite there yet”.

Is governance to blame:

Bekker and Steyn (2008) state that with the advent of 21st Century, project governance has gained a visible traction in project practice and academic circles. With corporate governance having established itself as a discipline in its own right, the concept of governance has gained acceptance in various other areas, including project management (Bekker and Steyn 2008). This research corroborates Bekker and Steyn’s findings regarding the important role of project governance in the implementation of BR in the case study organizations.

The initial findings paint a consistent picture on the role of governance in the effective implementation of BM and BR. All participants of this study informed that effective PM governance is the key in the pursuit of BM and BR. About 80 percent respondents expressed similar views that the project governance is not playing a proactive role in the implementation of BM and BR in project management processes. The people sitting in project boards and committees are at times not fully aware of their roles and responsibilities and there is no reporting requirement on BR, when the progress reports are submitted and discussed in project boards. One participant said, “They [project board] like when you provide benefits realization plan but if you do not, no body loses their sleep”. Another informant commented, “you may find very professional people sitting in the project board but at times they just sit in the meeting and play with their mobile phones during the meetings”. All

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participants think BR can be taken seriously only when project governance shows its seriousness about it. One participant said, “despite a lot of time of project managers is spent on reporting but benefits do not figure in progress reports to project committees, as mostly these reports focus on cost and time”. “If the project governance makes reporting on benefits tracking mandatory, the project managers will do it, in no time”. Another participant, who is personally committed to the cause of BR said, “people in [project] governance do not understand benefits, they look at it with a scatter-gun approach and do not see at BM as a process from start to the end”.

Young and Poon (2013) argue that top management support (TMS) is more critical for project success than other traditional success factors. They highlighted that TMS has been more critical in necessity than sufficiency, as compared to other success factors, which are stronger in sufficiency than necessity. By necessity, the authors mean that the demonstration of TMS is indispensable even if it may not be sufficient. The majority of participants agreed that the push for BR should come from the top management. The powerful role of project governance in the successful implementation of BR has been demonstrated in one case organization. In this organization BR has been taken seriously at all levels right from the minister level and down to the project manager. This success case study has been discussed in the following pages.

Benefits realization- a persistent challenge:

Chih and Zwikael (2015) state organization do not have the ability to formulate benefits and also do not have processes in place to link the delivered benefits to the promised benefits. In the public sector organizations, all projects cannot be judged for benefits in dollar terms as a large number of the projects are geared towards capability enhancements, which is at time difficult to measure accurately. Therefore, in the business cases for capability enhancements projects, project managers, identify high level benefits and further interdependency of projects with other departments makes it near impossible to measure benefits in such projects. However, benefits are not realized formally in those projects, even where possible such as the induction of new applications and automation of various processes resulting in efficiencies in reduced number of human resources. In a similar tone, another participant said about BR, “it is just like washing a dirty laundry in the public”. However, it does not mean that BR is a mission impossible, as it is being pursued at least in two case study organizations, albeit with a less than desirable success rate and these organizations expect to improve results in a period of three years.

Benefits realization- who’s responsibility:

PM literature has highlighted the role of benefits owner in effective BR. Peppard et al (2007) argue that benefits owners should be nominated and the responsibility for the realization of each benefits must be assigned to benefits owners. Almost all research participants have unanimously agreed on the key role of benefits owners in BR and they pointed out that the benefits owners should be nominated from amongst the operation managers/business managers, whose departments would be the end users of a given project product. However, the nomination of business owner/operations manager, as benefits owner would warrant the involvement of benefit owners in the very early phase of project life cycle. But in one case study organization, where billions are spent on the maintenance and development of new IT applications, three departments (i.e. Business, Delivery (IT) and Operations) are involved in project management. Business department identifies and develops

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project proposals; IT department delivers applications; and on completion the applications are handed over to the Operations department. The participants informed that business department does not frequently involve the managers of operations department, who are the end users, at the initial phase. They also identified a lack of engagement and highlighted existing disconnect between the business and operations departments, which ultimately impacts efforts for BR. In this organization, informants stated that in some projects, nominating a benefits owner can be challenging, if the end user is not confident about the expected benefits of a proposed system. In another case study organization, a participant said, “for effective benefits realization, benefits owners need funding, human resources and skills, which are not provided, neither by the PMO nor as a component of project budget”.

Impediments to effective benefits realization:

Impediments to effective BR have not been given much attention by the researchers and only Coombs (2015) has discussed inhibitors in an IT enabled organization for Information System implementation. This research highlights key impediments to effective BR in the public sector organizations. One of the unique challenges is the election cycle at the Commonwealth level. Since projects get budgets on annual basis and as a result of elections if a new government comes into power, some projects may be entirely shelved or funding can be drastically reduced, which results in a serious blow to expected benefits. In the public sector, overwhelming dependence on contractors for project delivery is posing another challenge, as the contractors are focussed on project delivery by the financial year cycle and that leads to oversight of benefits tracking for intermediate benefits during the delivery. One participant said, some of the project managers are from the era when benefits management was not a component of PM processes. He further said, “I know there are probably a lot of project managers out there, who do not do [BR] well, only for the fact they do not get asked for that.” Another interviewee said, “we do not have funding, time and skills for benefits realization”. In another public sector organization, one informant suggested, “the project funding should also include allocation for benefits realization”, and BR can be completed as post project component. He concurred with Zwikael and Smyrk (2012) who proposed to extend project life cycle to another phase to include BR.

A success story for benefits realization:

Despite slow progress, challenges and impediments, lack of funding and required skills for effective benefits management and realization, one Commonwealth agency has come up as a shining success story. In this organization, Project, Program and Portfolio Offices (P3O) has actively promoted benefits management and realization throughout all PM processes within all departments of this agency. The success story started with a push coming from the top at the minister level. One participant informed, “One of our ministers always asked the question on all project proposals, what would be the benefits to the tax payers and this turned our focus from project outputs to outcomes and benefits”. The department developed a benefits framework three years ago but the last 18 months have seen tangible results in our pursuit of effective BR. The benefits framework is an overarching framework used in the department to identify and measure benefits. This framework works in conjunction with change management and project management framework. However, it has been a slow journey, as the informant said, “For a while, benefits were a kind of afterthought and we were doing it but we really thought about these at the end”. But now benefits have taken a

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central stage and “we have been trying to change the mindset and now we are trying to address benefits at the concept stage”. Now when someone comes up with a project idea, “we ask what the potential benefits could be, and then at the business case stage, we go back and revisit the benefits to revalidate, whether or not the initial assumptions were still true, then at the planning phase, we further articulate and validate potential benefits, and subsequently, we develop benefits profiles and assign owners to benefits”. The identification of benefits owner is the key problem area for effective benefits realization in many case study organizations but in this case study organization, the business benefits owners are required to sign off the possible business benefits, which makes them accountable for benefits harvesting.

In all other organizations studied, PMO has been playing a passive role in project management. But in this organization P3O has been very proactive in the development of benefits management framework. “P3O has been driving the development of framework and policy, which has resulted in the form of a ‘Planning Hub’ which looks after governance, project management and benefit realization”. The journey of benefits management starts with the alignment of benefits to the objectives of the business area, which ultimately aligns to the organizational strategic directions. In this organization normally the project manager initially identifies potential benefits and at times contractors are brought into play if help is required and P3O reaches out to the project manager and help to validate the benefits. A research participant stated that project managers need to know the difference between project outcome and benefits. “At the moment the big challenge is to get people’s minds around what is outcome versus benefit”. However, this lack of clarity around outcomes and benefits have been noted in most of the interviews in other case study organizations, where informants considered outcomes and benefits as similar in meanings.

Unlike other counterparts in the public sector, studied by this research, the studied organization focus on both tangible and intangible benefits at the start of a project. However, tangible benefits are more important for the finance department, as one informant said, “the Chief Financial Officer is always looking at the financial benefits but the department is looking at both [tangible and intangible benefits].” About the measurement of intangible benefits, the informant said,

“In our framework, we do have an allowance for non-quantifiable benefits and generally a lot of time for those benefits, we feel that we have enough evidence to prove that there would be benefits regardless of the quantity. We have to show a very direct linkage to demonstrate that there is without a doubt, a benefit out there, before we claim that”.

The P3O has been instrumental in the implementation of benefits management and realization in the case study organization right from the benefits identification to realization. One informant said, “The Planning Hub is supposed to alert us about the coming up benefits, then we contact the business owners and say look, you have got these benefits and you are supposed to be harvesting, how you are going to do that”. Due to the planning hub, “now all that people have to do is to go to the online system, identify the benefits, put in some measures, open up the benefit profile”, said the informant. The benefits harvesting starts from three, six and twelve months after the handing over of project output but some projects continue for 20 years therefore, benefits tracking could not continue for such a long duration, hence, the informant said, “in such a case what we say to the people, you only need to measure until you are satisfied that you have harvested [early] measures”.

About success of the benefits management journey, the informant said, “We have 50 percent success rate in benefits harvesting. Now we are getting to point where we are quantifying and harvesting [benefits] and we are starting to get to the point, where we are going back [to the benefits owner] and saying okay now where are your benefits”.

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Lack of skills for successful BR has been frequently highlighted in all case study organizations but in this success case study organization BR has been adopted seriously through the training of all staff involved in project management, restructuring of P3O and training of senior executives, who sit in the governance boards for projects, development of BM framework, the availability of IT system in the form of 'Planning Hub' and the commitment of top management through effective project governance.

Conclusion:

The initial findings of this research highlight that there is a widespread awareness on the importance of benefits management and realization in the public sector organizations of the Australian Commonwealth. It shows that benefits are identified in the project initiation documents such as business case as a normal requirement but commitment to benefits realization wanes out as the projects progress. Majority of the respondents agreed that project governance can play a key role in the effective BR but they also expressed disappointment over the lacklustre support from the project governance for BR. However, one organization, discussed in this research, supports the argument that governance can play anchoring role in sending down the top management seriousness on benefits realization. This study finds that PMOs need to play active role in supporting benefits management and realization. Among the factors that impede BR are the lack of funds for conducting BR and required human resources with requisite skills. Effective BR can become a reality with the consistent support of the top management through active project governance, allocation of funds as a component of project budget and training of benefits owners to harvest benefits effectively. This paper is based on initial findings of this research and the findings present the emerging trends and themes. This research endeavoured to explore the benefits realizations frameworks, strategies, plans, processes and practices in six major agencies of Commonwealth government. This is the first qualitative research on benefits realization in the public sector at the Commonwealth level but it is not exhaustive. In order to have a comprehensive understanding of the BR practice across public sector and make sound generalization, more public sector organizations need to be investigated for benefits realization practices.

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