



Toolkit for a Project Benefits Review

Read through these notes to help you plan a Project Benefits Review session

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Before the Review

1. What's the Scope?

- Make a note of your understanding about the original, intended, objectives of this project. Consider if this might vary for others?
- Is this an interim project review or a post-implementation review? Choose the appropriate set of slides and customize accordingly for your session.

2. Who to involve?

- As well as you, the facilitator, you will need to ensure you have the following in attendance at the session:
 - A Documentor who can take notes at a laptop during the session
 - The Project Sponsor
 - The Project Manager
 - Representatives from the ISS/Technical project team
 - Representatives from the user project team members
 - A supply partner representative if appropriate
 - (Note: 15 people max)
- Do you need an independent facilitator or any independent input? Who could provide this and how easily can you get this resource approved for funding?
- If there are a number of key stakeholder groups who have been involved in the project, consider planning a number of separate sessions.
- Are there any underlying sensitivities that you're aware of which need to be addressed before you run the session? (If the answer to this is 'yes', you may need to seek guidance from the project sponsor or another trusted advisor.)
- From what you know of the people concerned, what will help to get the most out of the review session?
- **Remember, learning largely comes from taking part in the review rather than reading the output, so what will help to entice people to attend?**

3. Pre-Meeting Preparation.

- Send invitations. (Include the session objectives and it's good to pose 2 or 3 questions to participants beforehand to get them thinking.) See Appendix 1 for a sample invitation letter which you can adapt.
- Book a room. Find somewhere conducive to informal discussion and creative thinking. Ideally you want a room with plenty of space for round table discussions and some break out activities at different tables. Consider setting up the room with theatre style seating with a few tables around the edges of the room. (See Appendix 2 for some venue suggestions in the Newcastle area.)
- Gather relevant documentation and evidence.
- Collect relevant resources. See appendix 3 for suggested stationery items available for ordering via **XXXXXXXX**

Planning for Successful Facilitation

Think about the session you're planning and write down your thoughts about:

- How are you going to enable openness and learning?
 - Consider the ground-rules you want to agree with the Group such as:
 - Ensure confidentiality where appropriate; timings; responsibility for generating output; encourage appreciation of what has worked well and learning from what has not worked so well – a 'no-blame' agreement. One person talks at a time.

- How are you going to enable different opinions to be heard?
 - Plan activities where people split into smaller groups and organize different mixes at different times.
 - Ask the group to nominate different people to report back on activities.

Planning for Follow-up After the Session

Make provision to:

- Issue a report or summary document within 5 working days that clearly details the benefits achieved and measures used.

- Clarify how participants can be provide additional feedback, eg, via e-mail to you or A N Other?

- Determine how actions for this project will be taken forward, and with/by whom.

- Forward relevant actions for other projects where learning could be beneficial

- Decide how individuals will take ownership for improvements.

How will you share examples of learning and good practice?

Sometimes you can simply take a digital photograph of output drawn up on a wall or flip-chart, if the writing is clear enough. Or, you can type up a summary of output using the following tables:

Learning	Before	During	After
Positive			
Negative			

<p><u>Positive/Unexpected Benefits - Bonus</u></p> <ul style="list-style-type: none"> Identify, learn from & exploit these further 	<p><u>Positive/Expected Benefits - Justifies Investment</u></p> <ul style="list-style-type: none"> Achieved by good management
<p><u>Unexpected/Negative 'dis-Benefits' – Nasty Surprises</u></p> <ul style="list-style-type: none"> Understand to avoid in future 	<p><u>Expected/Negative 'dis-Benefits' - 'price worth paying'</u></p> <ul style="list-style-type: none"> Recognise & minimize

Other ways in which you can share learning within and outside the group include:

- Updating policy
- Evolving the project framework
- Sharing reusable resources
- Documenting successful practices as patterns
- Writing a short case study
- Recording a podcast
- Running a 'bring your own lunch' session to share ideas with other teams
- Moving key people to other teams to take knowledge / ideas with them
- Updating training courses
- What else?

At the end of the session: Ask group members to reflect on how well it went for 5 minutes (an 'After Action Review').

You can also ask for feedback when you send out any summaries of output.

Appendix 1

Suggested Content of the Invitation to attend.

Dear

BENEFITS REVIEW OF XXXX PROJECT

Date:

Time:

Venue:

We'd welcome your attendance at the forthcoming Benefits Review of the XXX Project, we hope you can join us.

The Objectives of the workshop are:

- To identify and **understand the reasons for success** arising from this project, both **planned and unexpected**;
- To identify and understand the **reasons why some aspects of the project didn't go according to plan**, especially where there were **negative outcomes**;
- To agree on and **record the most important lessons** learned;
- To agree **actions for sharing the lessons learned** - amongst this project team and for the future benefit of others running similar projects.

We intend that the workshop will give us all an opportunity to reflect on what we have learned from being involved in this project and to clarify what more can be done to maximise the value added for all. The session will be informal, interactive and hopefully fun! Refreshments will be on hand to sustain everyone, please let us know if you have any particular dietary requirements.

To help everyone get the most out of the workshop, please can you consider and make a note of your answers to the following questions – and bring them with you on the day:

1. What do you consider to be the main objectives of this project?
2. What benefits do you think have been most successfully achieved to date?
3. What have been the most significant challenges you have encountered as part of this project and what do you think could help to overcome them?
4. What do you most want to get out of attending the Benefits Review workshop?

Many thanks, please confirm your attendance by return e-mail and not later than.....

Look forward to seeing you there!

Appendix 2: Local Meeting Venues for Hire

Newcastle City Library <http://www.spaceontap.com/spaces/view/99/>

McKenna's at Northern Stage <http://www.spaceontap.com/spaces/view/47/>

Tyneside Cinema <http://www.tynesidecinema.co.uk/hire/headspace/>

Live Theatre (Quayside) <http://www.live.org.uk/hirelive/index.php>

Dove Marine (Cullercoats) <http://www.ncl.ac.uk/marine/about/facilities/dove/>

King's Road Centre at Newcastle University

<http://www.ncl.ac.uk/conferenceteam/meetings/oncampus/kingsroad/>

Appendix 3: Resources Checklist

Magic Whiteboard <http://www.magicwhiteboard.co.uk/>

Whiteboard Markers

Large post-its

Digital Camera